



**defenderData User Manual - US - DSO**

Created: Tuesday, March 25, 2014

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# defenderData User Manual - US - DSO

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## defenderData Version 5 Client User Manual



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[Admin Menu](#)

### Welcome

Welcome to the online help system for the defenderData 5 case management system. Browse through the help pages by clicking on the links above or selecting pages in the table of contents. To quickly find specific product information, enter search criteria in the search box above and click the search button.

For a PDF version of this document: [Download PDF](#)

## Most popular pages

---

[Welcome](#)  
[Home Screen](#)  
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[FAQ](#)  
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[Case Management](#)  
[System Requirements](#)  
[Case File](#)



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Home > Get Help

## Frequently Asked Questions

The [FAQ](#) provides answers to a question that has been asked before.

## defenderData Support

Contact our customer support department by email at [support@justiceworks.com](mailto:support@justiceworks.com) or by phone on our toll-free support line: (888) 696-9357.

## Live Guidance



Remote assistance may be provided by our support team using the Justice Works remote support utility. When speaking with a support technician, you may be asked to initialize a remote connection from the following page:

<http://support.justiceworks.com>

## Ask Us

If you're unable to find what you're looking, try the [FAQ](#).

To contact the defenderData support department:

Email: [support@justiceworks.com](mailto:support@justiceworks.com)  
Phone: (888) 696-9357

Articles in this section



Home > Get Help > FAQ

## FAQ

Please review the solutions below to common issues. If the issue persists, please contact [defenderData Support](#) for additional assistance.

### Q. Invalid Password

1. Passwords are case sensitive, please verify the password is entered exactly as it's shown in the login instructions email.
2. Re-enter your Organization ID which can be found in the installation instructions email. To re-enter your Organization ID, press Ctrl+F1 from the Login window and the following window will be displayed.



[Enlarge picture](#)

- When an invalid password is entered at login the following dialog will be displayed. When selecting the "Forgot Password" checkbox an option to have your password sent to you via email is displayed. The email address entered must match the email address that's associated with your defenderData account.



 [Enlarge picture](#)

If the correct email address is provided a confirmation will be displayed that your password has been sent to you via email. Please allow up to 5 minutes for the email to arrive and check your junk/spam folders in case the email was blocked.

### Q. Why am I receiving Error Code: 0 when attempting to Login?

- Please be sure that your computer was rebooted after the installation was completed.
- When the software is installed, the option for installing "Microsoft SQL Server Client Components" must be selected. This option is selected by default but if it was manually deselected please run the installation again with this option selected.



[Enlarge picture](#)

- Please verify that your personal firewall software isn't preventing the defenderData application from connection to the server. For example, Comodo, Kaspersky, Symantec, McAfee, Trend Micro, ZoneAlarm or even the Microsoft Windows firewall could be blocking the connection.

For instructions about how to add an Exception for the defenderData software please refer to the instruction manual for your firewall software.

 **Note:** The default path to the defenderData program which will need to be added to the Firewall Exception list is as follows:

C:\Program Files\justiceworks\jwclient.exe

If the Error Code: 0 still occurs, please contact [defenderData Support](#) for additional assistance.

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Alpha Training Webinars

### Weekly Alpha Review - Webinar Registration

This Webinar is held every week on Wednesday, from: Feb 15, 2012 to Mar 7, 2012 4:00 PM - 5:00 PM EST

[Register Now](#)

### Previously Recorded Webinars

Windows Media Player must be installed to view recorded Webinars. Click select a link below to begin streaming the video.

**Alpha Phase Training** - February 8th, 2012

[View the recording](#) (2h 9m)

**Weekly Alpha Phase Review** - February 15th, 2012

[View the recording](#) (1h 37m)

**Weekly Alpha Phase Review** - February 29th, 2012

[View the recording](#) (1h 28m)

**Weekly Alpha Phase Review** - March 7th, 2012

[View the recording](#) (1h 6m)

**Weekly Alpha Phase Review** - March 14th, 2012

[View the recording](#) (46m)

**Weekly Alpha Phase Review** - March 21st, 2012

[View the recording](#) (42m)

See also

Home > Staff Training

## Staff Training

Windows Media Player must be installed to view recorded Webinars. Click select a link below to begin streaming the video.

dD Windows

August 9th, 2012

   (2h 3m)

### View Outline

#### Welcome & Intro

00:00:00 - 00:02:00 Introduction and Overview  
00:02:01 - 00:04:49 Discussion of Login Instructions Email

#### Installation & Login

00:04:50 - 00:06:19 Installation Instructions  
00:06:20 - 00:07:21 Logging in and Forgot Password

#### Home Screen

00:07:22 - 00:07:45 Home Screen overview  
00:07:46 - 00:08:32 Recent Cases  
00:08:33 - 00:08:57 My Recent Reports  
00:08:58 - 00:09:56 Schedule  
00:09:57 - 00:36:40 Timesheet and Time Entries  
00:36:41 - 00:37:37 Reports  
00:37:37 - 00:38:20 Ticklers  
00:38:21 - 00:39:30 My Alerts/ Alerts  
00:39:31 - 00:40:26 My tasks / Tasks  
00:40:27 - 00:42:46 My Pending Documents

#### Help Menu (F1)

00:42:47 - 00:44:34 Manual  
00:44:35 - 00:45:34 News Page

#### Search & New Case

00:45:35 - 00:52:35 Cases Master List Using Case and Name Search  
00:52:35 - 01:05:53 Conflict Check, New Case, Required Fields

#### Criminal Cases

01:05:54 - 01:12:44 Criminal Cases, Notes and Charges  
01:12:45 - 01:19:54 Related People

#### Events

01:19:55 - 01:20:29 Event Types  
01:20:30 - 01:26:59 Schedule  
01:27:00 - 01:29:19 Synchronizing Defender Data with Lotus Notes

#### Timeout Function

01:29:20 - 01:32:22 The Idle Timeout Function

#### Event Types

01:32:23 - 01:33:35 Events > Ticklers  
01:33:36 - 01:34:19 Events > Time Entry  
01:34:20 - 01:35:49 Events > Expenses

#### Status & Flags

01:35:50 - 01:36:02 Status Log  
01:36:03 - 01:37:06 Flags

#### Workload, Appeal & Closing

01:37:07 - 01:37:27 Overview  
01:37:28 - 01:38:07 Workload and Notes Entry

01:38:08 - 01:40:14 Close Tab

**Documents**

- 01:40:15 - 01:40:44 Documents Overview
- 01:40:45 - 01:41:26 Attaching and Opening Documents
- 01:41:27 - 01:43:13 Version Control (Check In / Check Out)
- 01:43:14 - 01:44:15 Emailing documents and multiple selections
- 01:44:16 - 01:45:22 Scanning documents
- 01:45:23 - 01:46:39 Linking documents
- 01:46:40 - 01:50:24 Templates

**Legal Pad**

- 01:50:25 - 01:52:05 Legal Pad Overview

**Tips**

- 01:52:06 - 01:53:42 Quick tips and Sticky Notes

**Q&A**

- 01:53:43 - 02:03:00 Questions and Answers

**dD Web**

September 11th, 2012



**dD Mobile**

November 5th, 2012



**dD Windows Focused Training**

Timekeeping & Reporting

April 18th, 2012



Templates

April 25th, 2012



Administrative Tasks

May 2nd, 2012



Document Management & Reports

May 9th, 2012



Tips, Schedule & Lotus Notes Sync

May 16th, 2012



Timesheet

September 17th, 2012



See also

- [Welcome](#)
- [Get Help](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)

Login  
Home Screen  
Cases Menu  
Case Management  
Schedule Menu  
Timesheet  
Ticklers Menu  
Alerts Menu  
Tasks Menu  
Legal Pad  
Templates Menu  
Reports Menu  
Quick Reference Guide  
Admin Menu

Home > Admin Training

# Admin Training

Windows Media Player must be installed to view recorded Webinars. Click select a link below to begin streaming the video.

## dD Windows

August 17th, 2012  
   (1h 37m)

**+** Prior Sessions

April 6th, 2012  
   (54m)

June 29th, 2012  
   (1h 13m)

July 13th, 2012  
   (1h 12m)

July 20th, 2012  
   (1h 16m)

August 3rd, 2012  
   (1h 17m)

August 10th, 2012  
   (1h 25m)

## dD Mobile

January 9th, 2012  
   (48m)

**+** Prior Sessions

January 2nd, 2012  
   (38m)

December 12th, 2012  
   (46m)

See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
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- [Reports Menu](#)

Quick Reference Guide  
Admin Menu

Home > Admin Menu > People Admin > Security > Email Login



## Admin Preview Webinars

Windows Media Player must be installed to view recorded Webinars. Click select a link below to begin streaming the video.

### Topics

System Overview, Case Edit, Timekeeping, Scheduling & Reports

June 6th, 2012

[View the recording](#) (1 hr 25m)

Document Management, Reports

June 13th, 2012

[View the recording](#) (1 hr 5m)

Administrative Tasks

June 20th, 2012

[View the recording](#) (1 hr 6m)

Multi Edit, Reports & Legal Pad

June 27th, 2012

[View the recording](#) (1 hr 13m)

See also



Home > Installation

## Installation

### Articles in this section



System Requirements



Installation Instructions

Home > Installation > System Requirements

## System Requirements

### Required:

- Windows XP SP3
- 512 MB RAM
- Internet connection
- Minimum Desktop Resolution of 1024x768

### Recommended:

- Windows 7
- 2 GB RAM or more
- Cable/DSL Internet connection or faster
- Desktop Resolution of 1280x800 or higher
- 19" Monitor or larger

Home > Installation > Installation Instructions

## Installation Instructions

The defenderData client software can be installed using the steps as detailed below. Please contact [defenderData Support](#) to obtain your Organization ID and download link for the most current version of the software for your system.

1. Double-click the setup.exe file provided by [defenderData Support](#).
2. The following screen will be displayed, select **Next** to continue.



[Enlarge picture](#)

3. The default destination will be displayed. Change that path if needed and select **Next** to continue.



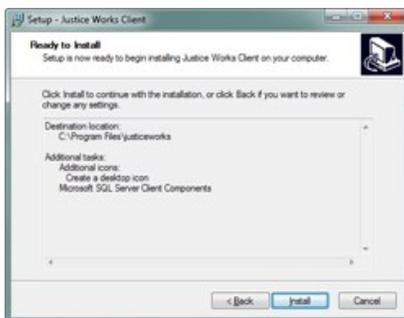
 [Enlarge picture](#)

4. The default Tasks are shown, both selected by default. The desktop icon may be unselected but the Microsoft SQL Server Client Components must be selected. Select **Next** to continue.



 [Enlarge picture](#)

5. The installation summary is now displayed, select **Install** to complete the installation.



 [Enlarge picture](#)

6. After the installation has completed the option to restart your computer is selected by default. Select **Finish** when you're ready to restart your computer. It's not necessary to restart immediately upon completing the installation but please note that your computer will need to be restarted before the software may be used.



 [Enlarge picture](#)

7. After reboot you'll see the **Justice Works Client** shortcut on your desktop. If a desktop shortcut wasn't created, it can also be found under Start ->

Programs -> Justice Works.



Double-click the icon to run the program and you'll be prompted to enter your Organization ID. Please contact [defenderData Support](#) if you haven't received your Organization ID.



 [Enlarge picture](#)

Next, the Justice Works Login Window will be displayed. Enter your User Name and Password to login.



 [Enlarge picture](#)

Please note: Once you've successfully logged in the **Justice Works Client** desktop shortcut will be replaced with the following **defenderData 5** shortcut:



See also

[System Requirements](#)

## defenderData Installation

The defenderData client software can be installed using the steps as detailed below. Please contact defenderData Support to obtain your Organization ID and download link for the most current version of the software for your system.

1. Double-click the setup.exe file provided by defenderData Support.
2. The following screen will be displayed, select **Next** to continue.





 [Enlarge picture](#)

- The default destination will be displayed. Change that path if needed and select **Next** to continue.



 [Enlarge picture](#)

- The default Tasks are shown, both selected by default. The desktop icon may be unselected but the Microsoft SQL Server Client Components must be selected. Select **Next** to continue.



 [Enlarge picture](#)

- The installation summary is now displayed, select **Install** to complete the installation.

## Ask Us

For further assistance, please contact the defenderData support department:

Email: [support@justiceworks.com](mailto:support@justiceworks.com)

Phone:  
(888) 696-9357

## Live Guidance



Remote assistance may be provided by our support team using the Justice Works remote support utility. When speaking with a support technician, you may be asked to initialize a remote connection from the following page:

[support.justiceworks.com](http://support.justiceworks.com)

## System Requirements

Required:

- Windows XP SP3
- 512 MB RAM
- Internet connection
- Minimum Desktop Resolution of 1024x768



 [Enlarge picture](#)

#### Recommended:

- Windows 7
- 2 GB RAM or more
- Cable/DSL Internet connection or faster
- Desktop Resolution of 1280x800 or higher
- 19" Monitor or larger

6. After the installation has completed the option to restart your computer is selected by default. Select **Finish** when you're ready to restart your computer. It's not necessary to restart immediately upon completing the installation but please note that your computer will need to be restarted before the software may be used.



 [Enlarge picture](#)

7. After reboot you'll see the **Justice Works Client** shortcut on your desktop. If a desktop shortcut wasn't created, it can also be found under Start > Programs > Justice Works.



8. Double-click the icon to run the program and you'll be prompted to enter your Organization ID. Please contact defenderData Support if you haven't received your Organization ID.



 [Enlarge picture](#)

9. Next, the Justice Works Login Window will be displayed.

Enter your User Name and Password to login.



 [Enlarge picture](#)

10. Please note: Once you've successfully logged in the **Justice Works Client** desktop shortcut will be replaced with the following **defenderData 5** shortcut:



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Home > Login



## Starting the Application

To start the program, double-click the  **defenderData 5** icon on your desktop. If a desktop shortcut wasn't created, it can also be found under Start -> Programs -> Justice Works.

## Logging In

Before you can perform any functions or view any case information in dD, you must login to the system. Once the application has been started, the Login Window will be displayed as shown here.

To login:

1. Enter your User Name
2. Enter your Password
3. Click OK to login

### Remember Window Position

If enabled, the size and position of all windows will be remembered each time you login to the system from the same PC. To reset all size and position settings to default, simply deselect the "Remember Window Position" checkbox before logging in.



 [Enlarge picture](#)

### Invalid Password

If an invalid password is entered at login, the following dialog will be displayed. Upon selecting the "Forgot Password" an option to have your password sent to you via email is displayed. The email address entered must match the email address that's associated with your defenderData account.



 [Enlarge picture](#)

If the correct email address is provided a confirmation will be displayed that your password has been sent to you via email. Please allow up to 5 minutes for the email to arrive and check your junk/spam folders in case the email was blocked.

### Get Help

If you're receiving an error at login please select the "[Get Help](#)" link for solutions for common login issues or to contact [defenderData Support](#).

### Remember Window Position

When this option is enabled the size and placement of the main application window will be remembered on your computer screen. For multiple monitor configurations, this is particularly useful when viewing documents on your alternate screen.

## Change Password

If you wish to change your password, click the **Change Password** button from the Login Window after entering your User Name and the following window will be displayed.



 [Enlarge picture](#)

To change your password first enter your Current Password followed by the New Password. To verify that your New Password has been entered correctly it

must be entered again in the ReType New Password field. Click "OK" to confirm the password change.



**Note:**

Passwords are case sensitive and for security purposes the initial password that's provided to you will include a combination of upper and lower case characters in addition to at least one number or symbol. Please note that the password can also be copied from your login instructions email and then pasted into the password field.

If you're still unable to login please press Ctrl+F1 from the defenderData login window and you'll be prompted for your Organization ID which is provided in your Login Instructions email. For further assistance please see your District Administrator or contact [defenderData Support](#).

## See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Home Screen](#)
- [Cases Menu](#)
- [Case Management](#)
- [Schedule Menu](#)
- [Timesheet](#)
- [Ticklers Menu](#)
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- [Tasks Menu](#)
- [Legal Pad](#)
- [Templates Menu](#)
- [Reports Menu](#)
- [Quick Reference Guide](#)
- [Admin Menu](#)

Home > Home Screen

# Home Screen

The Home Screen is the first menu shown when you first login to the system. The toolbar buttons at the top of the screen are used to navigate throughout the system. While working within the various sub-menus of the system, a  Home button is available for navigating back to this screen.

Several panes are also included within the main display area of the Home Screen, as shown in the picture to the right. These panes contain information and tools for some of the most frequently accessed areas of the system. Each pane may be  expanded or  collapsed by clicking the button in the upper-right corner.



 [Enlarge picture](#)

## Toolbar

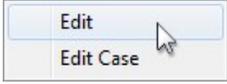
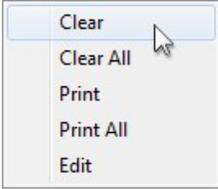
Select from the toolbar options below for more details about each menu:

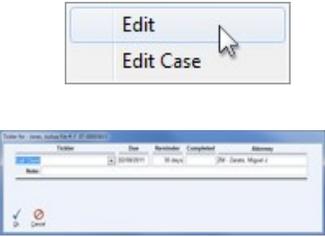


## Dashboard

Details and instructions for each pane:

<p> <b>My Recent Cases</b></p> <p>Cases that you've recently created, edited or viewed are shown here in the order that each case was accessed.</p> <p>Left-clicking a Case from the list will display the Case for <a href="#">viewing &amp; editing</a> purposes.</p> <p>Right-clicking a case provides an option for adding the case to your Legal Pad.</p> <div data-bbox="276 1428 511 1491" style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Legal Pad </p> </div> <p>Multiple cases can be added to the Legal Pad for fast and convenient note viewing and editing. For more details, please see the <a href="#">Legal Pad</a> section of this manual.</p>	<p> <b>Schedule</b></p> <p>Displays a list of upcoming scheduled events on your calendar. The events shown here are based on your Preferences in the <a href="#">Events</a> menu.</p> <p>Left-click any event to view it on the calendar view.</p> <p>Right-clicking an event will provide options for editing the Case that's associated with the event as well as editing the Event directly as shown below.</p> <div data-bbox="657 1491 885 1575" style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Edit </p> <p>Edit Case</p> </div> <div data-bbox="592 1585 917 1690" style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> </div> <p> <a href="#">Enlarge picture</a></p>	<p> <b>My Alerts</b></p> <p>Alerts are notifications sent to you by other users. Alerts are most commonly linked to a note on case but can also be linked to a basic note created in the <a href="#">Alerts Menu</a>.</p> <p>Alerts may also be sent to a group of users to provide multiple people with important case related information.</p> <p>Left-click an Alert to view the Case associated with the Alert.</p> <p>Right-clicking an Alert will display the following options:</p> <div data-bbox="1047 1648 1258 1837" style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Clear </p> <p>Clear All</p> <p>Print</p> <p>Print All</p> <p>Edit</p> </div> <p>Clear - Clears the selected Alert.</p>
--	--	---

		<p>Clear All - Clears all Alerts (notes associated with the Alerts will still appear on the Notes tab of the cases).  Print - Prints the selected Alert.  Print All - Prints all Alerts.  Edit - Opens the Alert in an Edit window.</p>
	<p> <b>Time Entries</b></p> <p>Displays all Time Entries that have been created today and any previously created Time Entries which are still incomplete.</p> <p>Left-click any Time Entry to launch the Timesheet.</p> <p>Right-clicking a Time Entry will provide options for editing the associated Case as shown below.</p> 	<p> <b>My Tasks</b></p> <p>Displays all Tasks that have been assigned to you specifically. Tasks are most commonly linked to a note on case but can also be linked to a basic note created in the <a href="#">Tasks Menu</a>.</p> <p>Right-clicking a Task will display the following options:</p>  <p>Clear - Clears the selected Task.  Clear All - Clears all Tasks (notes associated with the Tasks will still appear on the Notes tab of the cases).  Print - Prints the selected Task.  Print All - Prints all Tasks.  Edit - Opens the Task in an Edit window.</p>
<p> <b>My Recent Reports</b></p> <p>Displays a list of the most recent reports you've run. Selecting a report from the list will select it from the <a href="#">Reports Menu</a>.</p>	<p> <b>Ticklers</b></p> <p>Displays all of your tickler reminders. See the Events section for more details.</p> <p>Right-clicking a Tickler will provide options for editing the Case that's associated with the event as well as editing the Tickler directly as shown below.</p>	<p> <b>My Pending Documents</b></p> <p>This section contains all of your Pending <a href="#">Auto Docs</a>. Auto Docs are documents that have been added to a queue for automatic generation and printing during the case input or edit process. Selecting any document will open a list of all documents that are in the</p>

	 <p><a href="#">Enlarge picture</a></p>	<p>queue to be generated or printed.</p>
--	--	--

See also

- [Welcome](#)
- [Home Screen](#)
- [Login](#)
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- [Case Management](#)
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- [Case File](#)

Home > Cases Menu

## Cases Menu

To locate a case in the system, select the  **Cases** button from the  [Home Screen](#). The various search modes found in this section are designed to help with finding cases using a variety of search methods.

### Search Modes

Select an option below to learn more:



### See also

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[Features Matrix](#)  
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[Reports Menu](#)  
[Quick Reference Guide](#)  
[Admin Menu](#)

Home > Cases Menu > Case Search

## Case Search

Since one of the primary purposes of the dD Client is to maintain a database of information, it provides powerful functions to search for information in the database.

### Search Menu Tools

Select an option below to learn more:



### Case Master List - Search Criteria



The screenshot shows a search criteria form with the following fields:

File #:	<input type="text"/>	Attorney:	<input type="text"/>	Opened:	<input type="text"/> 00/00/0000
Case #:	<input type="text"/>	Last Name:	<input type="text"/>	Event Type:	<input type="text"/>
Status:	<input type="text"/>	First Name:	<input type="text"/>	Event:	<input type="text"/> 00/00/0000
Flag:	<input type="text"/>	DOB:	<input type="text"/> 00/00/0000	Closed:	<input type="text"/> 00/00/0000

[Enlarge picture](#)

Under Search Criteria there are a number of fields which can be used to search cases.

Entering information in these fields allows you to filter the results that are found by the search. If the information you

enter in these fields is specific enough, only one case will appear in the list; the one you are searching for.

To execute a search, enter either full or partial information in one or more of the fields, then press the  **Lookup** button (or press the <Enter> key). The system will search through the database and display the cases that match your search criteria. If you enter some letters or numbers in a Search Criteria field, the system will search for any fields matching or beginning with the same letters or numbers that were entered.

To begin a new search, use the  **Clear** button to clear all fields.

### Search Examples

- Selecting a "Hearing" Event Type and specifying an Event Date range for the current week will retrieve all Cases with a Hearing scheduled for the current week.
- Entering the name "Al" in the First Name field would locate any case beginning with "Al", such as "Albert", "Alan" or "Alice".
- Selecting the "Open" Status and an Attorney will retrieve all Open Cases for the specified Attorney.
- A combination of the above methods can be used. For instance, entering "F" in the File # field and selecting an Attorney would retrieve all Felony Cases for the selected Attorney.

 **Note:** A maximum of 1000 cases can be found with each search. To narrow your search results, enter additional Search Criteria. A  [Report](#) is more suitable when a larger list of cases is needed.

### Name Search Modes

The buttons next to the Last & First Name fields can be used to toggle between the following search modes:

 **Normal Search** - This is the default search method which retrieves names of an exact match or names beginning with the characters specified.

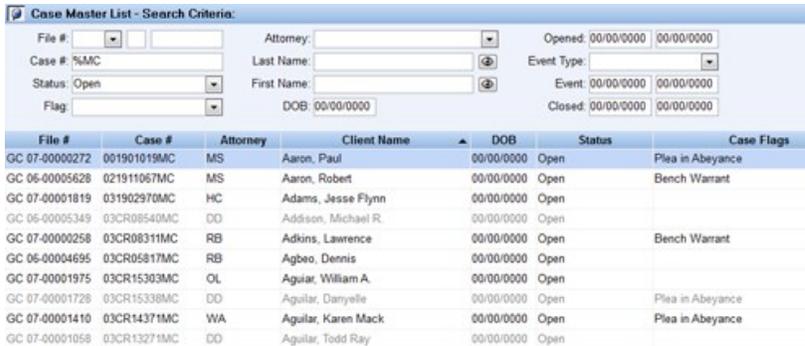
- Searching for "Jim" will find "Jim", "Jimmy", "Jimi", "Jimbo" and "Jiminy"
- Searching for "Mike" will find "Mike", "Mikey", "Mikel" and "Mikela"
- Searching for "Steve" will find "Steve" and "Steven"

 **Name Thesaurus Search** - References a Name Thesaurus dictionary containing over 40 million first & last names with alternate spellings and common nicknames. In the following examples, search results will include the following names in addition to the names found by the Normal Search.

- Searching for "Jim" will find "James", "Jamie" and "Jaime"
- Searching for "Mike" will find "Michael", "Miguel" and "Mickey"
- Searching for "Steve" will find "Stephen", "Stevie" and "Esteban"

### Wildcard Search

In addition to the basic searches, the "wildcard" character (%) can be used to act as a placeholder for unknown letters or numbers that may exist anywhere within a field.



File #	Case #	Attorney	Client Name	DOB	Status	Case Flags
GC 07-00000272	001901019MC	MS	Aaron, Paul	00/00/0000	Open	Plea in Abeyance
GC 06-00005628	021911067MC	MS	Aaron, Robert	00/00/0000	Open	Bench Warrant
GC 07-00001819	031902970MC	HC	Adams, Jesse Flynn	00/00/0000	Open	
GC 06-00005349	03CR08540MC	DD	Addison, Michael R.	00/00/0000	Open	
GC 07-00000258	03CR08311MC	RB	Adkins, Lawrence	00/00/0000	Open	Bench Warrant
GC 06-00004695	03CR05817MC	RB	Agbeo, Dennis	00/00/0000	Open	
GC 07-00001975	03CR15303MC	OL	Aguilar, William A.	00/00/0000	Open	
GC 07-00001728	03CR15338MC	DD	Aguilar, Danyelle	00/00/0000	Open	Plea in Abeyance
GC 07-00001410	03CR14371MC	WA	Aguilar, Karen Mack	00/00/0000	Open	Plea in Abeyance
GC 07-00001058	03CR13271MC	DD	Aguilar, Todd Ray	00/00/0000	Open	

In the example shown here the search would retrieve a list of Open cases with a Case # ending in "MC".

 **Note:** When cases are shown with gray text this indicates that the user has View permissions for these cases but not \*Edit Permissions. These cases may be viewed in the Case Edit screen but changes cannot be made.

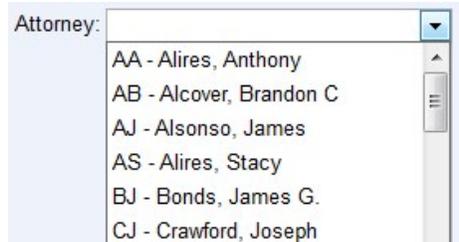
\*Permissions are configured on a per Attorney basis. Only a system administrator may grant Edit

permissions.

### Picklist Fields

Search criteria fields that have picklists (noted by a small box with the  symbol to the right of the field) operate slightly different than other search criteria fields. You can enter information into these fields in one of three ways:

- Use the  button to the right of the field to open the picklist and scroll through the list to find the desired entry and select it.

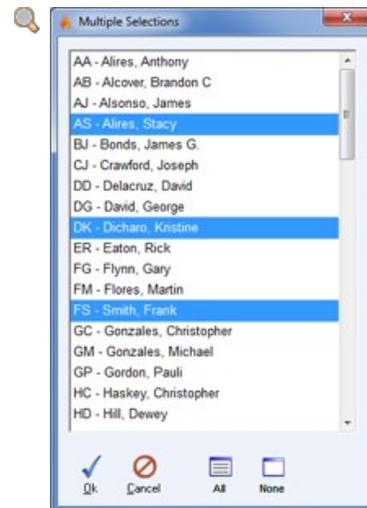


- Place the cursor in the field and enter a letter. A name will immediately appear in the field which will be the first name



in the list that begins with that letter. Additional letters can be entered to locate a more specific name. For example, entering "FS" in the Attorney field select "FS - Smith, Frank".

- Right-click anywhere in the field to make multiple selections as shown in the image to the right. To select multiple names, hold down the <Ctrl> key while selecting each name. To select all names in the list, use the  **All** button. To clear any selections that have been made, use the  **None** button. When multiple selections have been made, the field will appear with a blue background as shown to the right.



[Enlarge picture](#)

## Date Fields

When building a search, you'll find Date fields (such as DOB, Opened and Closed) where dates and date ranges can be keyed in manually. In addition, using the mouse to right-click anywhere over a Date field opens a calendar as seen to the right.

The blue arrow icons are used to step forward and back through each Year or Month. Once the desired month is displayed, simply double-clicking a Day of the month will insert the numerical date into the field.

To close the calendar at any time, press the  button or press the <ESC> key.

Additionally, the picklist can be used to select from a set of predefined dates. These include the following:

Today, Yesterday, This Week, Last Week, Next Week, Selected Week, This Month, Next Month, Last Month, First Quarter, Second Quarter, Third Quarter, Fourth Quarter, This Year, Next Year, Last Year, Selected Year.

**Example:** When entering an "Opened" date range, single-clicking January 16th then choosing "Selected Week" from the picklist would set a range of 01/16/2011 – 01/22/2011 in the date fields.

## Column Sorting

Any of the lists that are displayed in the main display area may be sorted alphabetically or numerically using any of the columns shown. There are two methods that may be used for sorting columns.

1. By clicking the column headers any column can be sorted in  ascending order. Clicking the same column header again would re-sort the list in  descending order.

**Example:** The list shown below is sorted in ascending order by Client Name as indicated by the  icon.



Attorney	Client Name ▲	DOB	Status
BJ	Aaron, Diane M.	00/00/0000	Open
NE	Abdi, Ted T.	00/00/0000	Open
CD	Abeyta, Jill Ann	04/09/1977	Open
BJ	Acebedo, Richard	00/00/0000	Open
CD	Acevez-Feliz, Violet Lynn	00/00/0000	Open
LL	Adams, Michael Daniel	00/00/0000	Open
MR	Adolf, Harold	00/00/0000	Open
LL	Adolph, Sarah Christian	00/00/0000	Open
CD	Affleck, Hugo	03/06/1962	Open
CJ	Aguilar, Cory R.	10/13/1981	Open

2. You may also sort by multiple columns using a secondary sorting method. This is accomplished by first sorting by one column, then holding the <Ctrl> key and clicking the column header of a different column.

**Example:** The primary sorting method for the list shown below is ascending order by Attorney and the secondary sorting method is ascending order by Client Name.

Attorney ▼	Client Name ▲	DOB	Status
MB	Bane, Kenneth Mario	00/00/0000	Open
MB	Burton, Alike Gomez	06/20/1961	Open
MB	Kawakahi, Corey S.	00/00/0000	Open
MB	Marks, Marcello Guy	09/20/1975	Open
MAR	Gallegos, Jean	00/00/0000	Open
MAR	Jones, David	00/00/0000	Open
MAM	Gonzales, Armando	03/17/1973	Open
MAM	Ward, Vu	03/05/1972	Open
LG	Archuleta, Sherrie	00/00/0000	Open
LG	Benally, Terri John	00/00/0000	Open

## Combining Search Results

The  **Combine search** is used to combine the results of your new search with the results found by your previous search.

**Example:** In the search results shown below, the first 3 cases were found by searching for all cases assigned to Attorney "AJ" where the Client Last Name matches "BELL". The last 2 cases were found using the Combine search to add all cases assigned to Attorney "AS" where the Client Last Name also matches "BELL".

Attorney	Client Name ▼	DOB	Status
AJ	Bell, Sheryl Matthew	00/00/0000	Open
AJ	Bell, Robin	00/00/0000	Open
AJ	Bell, Joshua	00/00/0000	Number Only
AS	Bell, Janica	00/00/0000	Closed
AS	Bell, Blake V.	01/23/1973	Closed

### See also

[Name Search](#)  
[Document Search](#)  
[Note Search](#)

[Home](#) > [Cases Menu](#) > [Case Search](#) > [Multi Edit](#)

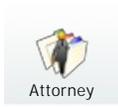


## Multi Edit

The Multi Edit menu is used to make batch edits to multiple cases at once.

## Multi Edit Modes

Select an option below to learn more:



### See also

[Auto Doc](#)

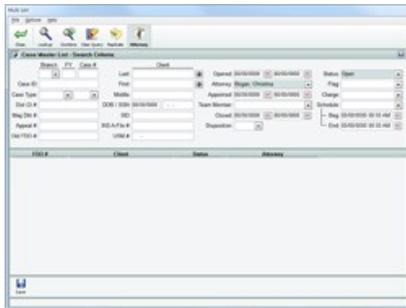
[Home](#) > [Cases Menu](#) > [Case Search](#) > [Multi Edit](#) > [Attorney Mode](#)

## Attorney Mode

Multi Edit - Attorney mode is used to batch reassign the primary Attorney that's assigned to cases. In the following tutorial 146 open cases are reassigned from one Attorney to another.

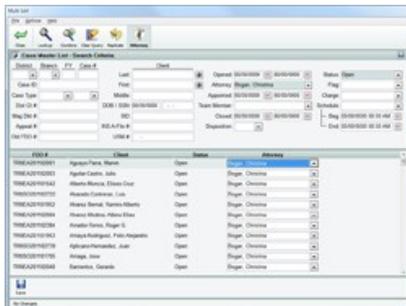
### Batch Reassignment Steps

1. From your search criteria, select the name of the Attorney currently assigned to cases. Select **Open** from the Status field if only open cases are to be reassigned:



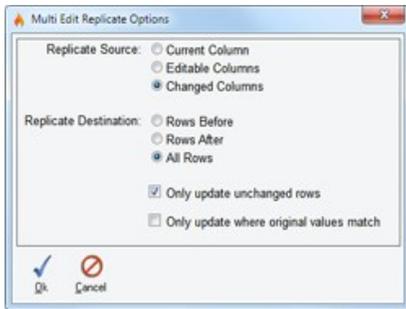
[Enlarge picture](#)

2. Select **Lookup** to retrieve all cases matching your search criteria:



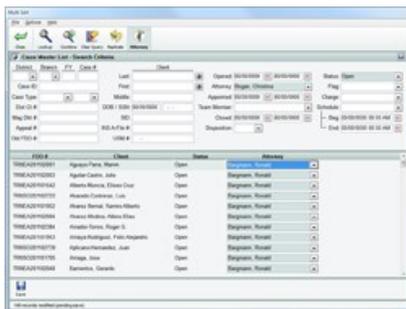
[Enlarge picture](#)

3. Modify the Attorney for one of the cases listed in your search results.
4. Select Replicate to display the following options:



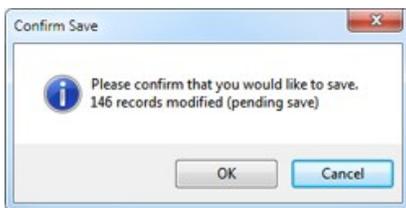
[Enlarge picture](#)

5. The default options are to replicate the Changes Columns to All Rows which have not yet been changed. Select **OK** to apply.
6. The reassignments are now ready to be completed as shown below. Please note the dialog in the lower-left of the status bar which states "146 records modified (pending save)":



[Enlarge picture](#)

7. Select **Save** when finished.



[Enlarge picture](#)

Home > Cases Menu > Case Search > Auto Doc



Auto Doc

The  **Auto Doc** button in the  **Case Search** menu opens the **Auto Document Generation** window as shown to the right. This window is used to generate and print pending documents.

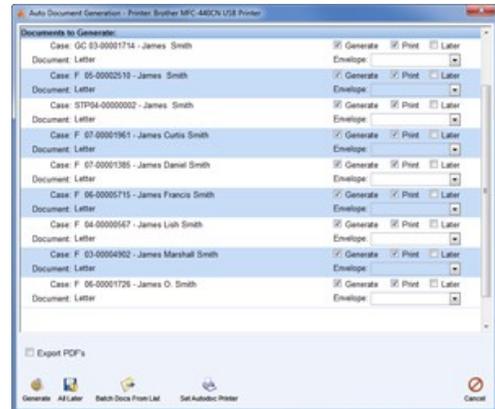
Auto Docs are documents that have been added to a queue for automatic generation and printing when a status change has been made for a case or when a Flag has been added to a case. One of the primary advantages to this feature is that all of the documents can be generated all at once.

**Example 1:** When a case is opened, the application can be configured to automatically generate a "Notice of Appearance" document.

**Example 2:** A Flag called "Bench Warrant" could be used to automatically generate and print a "Notice of Warrant to Client".

Each document may be configured to print an envelope with the name and address of the **Defendant** or any person related to the case, such as the Judge, Parent/Guardian or Opposing Counsel.

The documents that have been selected for "Generate" and "Print" will be generated and printed upon clicking the  **Generate** button. Documents marked for "Later" will not be generated or printed. Click the  **All Later** button to select "Later" for all documents. The  **Cancel** button is used to exit the "Auto Document Generation" window.

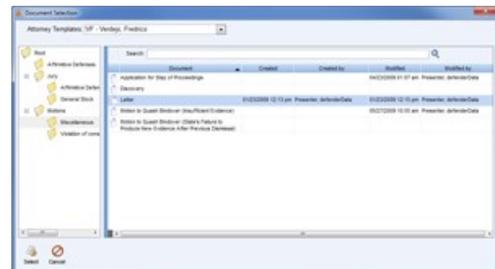


 [Enlarge picture](#)

## Batch Document Generation

The  **Batch Docs From List** button is used to generate and print a document for all cases that were found by the last case search. When selecting this option, the **Document Selection** window will be displayed for selecting the template to generate.

Next, select an attorney from the **Defender Templates** field to see a list of available templates. Once the correct template has been found, double-click the file or highlight it and click the  **Select** button.



 [Enlarge picture](#)

See also

[Multi Edit](#)

[Home](#) > [Cases Menu](#) > [Name Search](#)

## Name Search

The Name Search menu is used to find any client record in the database, regardless of their Role. In the example shown here, all records with a Last Name of "Jones" and a first name beginning with "W" are found. In addition to Defendants, the list includes Witnesses and Defendant Aliases.

defenderData

File Search Mode Options Help

Home Lookup Combine Clear Query Case Name Document New Edit Delete Auto Doc Print

Name Search - Criteria:

Last Name: Jones First Name: W

Related Person	Role	File #	Case	Defendant
Jones, Wade	Defendant	ST 07-0000614	021400629MS	Jones, Wade
Jones, Wally	Witness -	F 07-00005815	031905108FS	Jones, Joshua
Jones, Wally	Witness -	F 03-00001976	991921006FS	Smith, Kristin
Jones, Walter	Defendant	STP06-00000015	001907075FS	Jones, Walter
Jones, Warren J.	Defendant	ST 04-0000638	001600016MS	Jones, Warren J.
Jones, Wendy	Defendant	F 03-00002933	991923618FS	Jones, Wendy
Jones, William	Defendant Alias	F 07-00003078	031908090FS	Caballero, Bill Macias
Jones, William Victor Orland	Defendant	F 07-00003871	031102244FS	Jones, William Victor Orland
Jones, Willie	Defendant Alias	F 07-00001559	031906274FS	Martinez, William F.
Jones, Willy	Defendant Alias	F 03-00000996	991915442FS	Rios, Willie Patrick
Jones, Willy	Defendant Alias	F 03-00001014	991915459FS	Jensen, Willie Barnardo

Retrieved 11 rows.

defenderData Presenter

[Enlarge picture](#)

To view each case the individuals are associated with either double-click the row from the search results or select the row and then click the **Edit** button.

## See also

[Case Search](#)  
[Document Search](#)  
[Note Search](#)

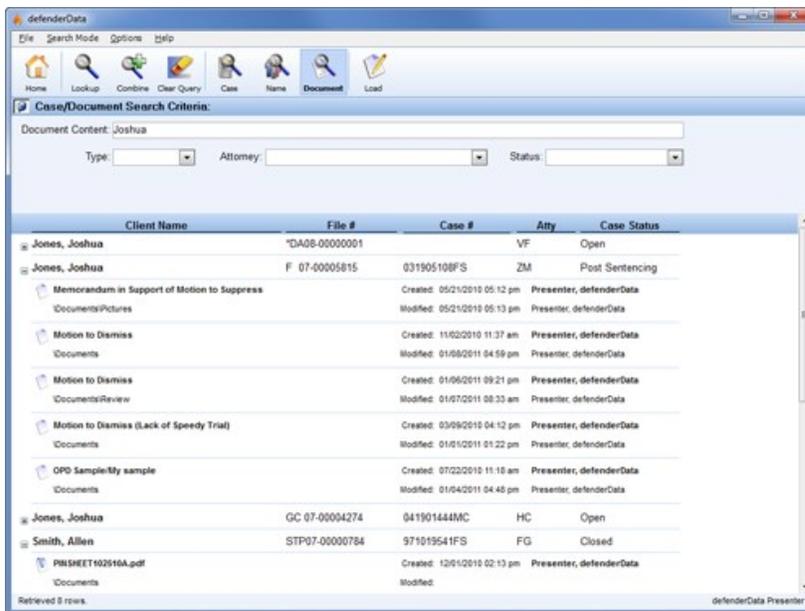
[Home](#) > [Cases Menu](#) > [Document Search](#)

## Document Search

The Document Search menu is used to search all documents in the database. Documents can be found by entering Search Criteria in the following fields:

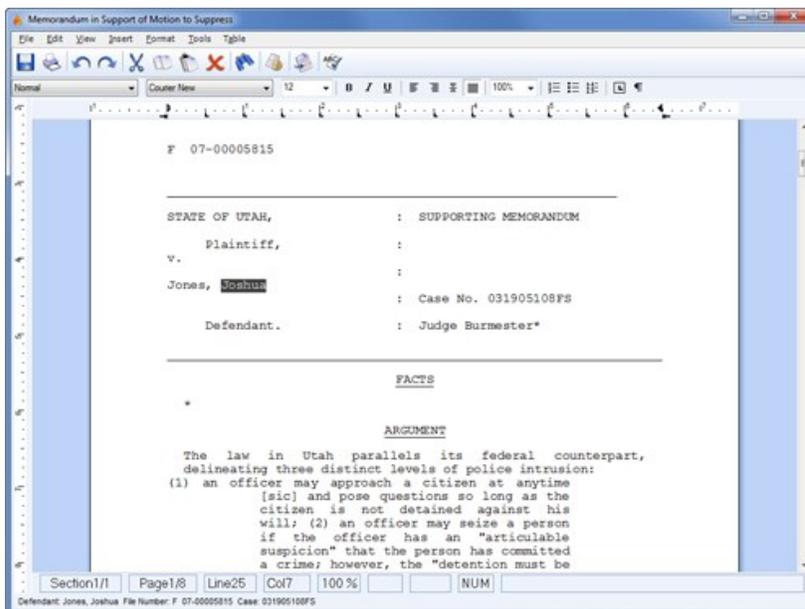
- **Document Content** - This is a powerful full-text search against all searchable document. For example, internally created documents or MS Word, Adobe PDF and even Scanned Documents.
- **Case Type** - Results can be restricted to specific types of cases (CR, SR, OT, PR, etc.)
- **Attorney** - Results can be restricted to cases assigned to a specific Attorney.
- **Status** - By selecting a Case Status such as "Open", only results for Open Cases will be found.

In the example shown below, all documents containing "Joshua" are found.



[Enlarge picture](#)

To view each document either double-click the row from the search results or select the row and then click the **Edit** button. The associated case will be viewed and the document will then be opened in a separate window as shown below.



[Enlarge picture](#)

See also

Case Search  
Name Search  
Note Search

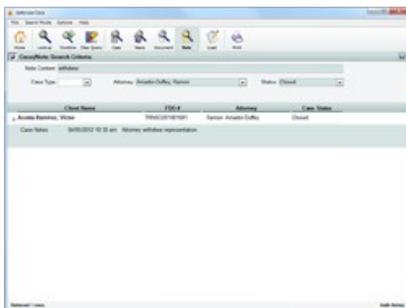
[Home](#) > [Cases Menu](#) > [Note Search](#)

## Note Search

The Note Search menu is used to search all notes in the database. Notes can be found by entering Search Criteria in the following fields:

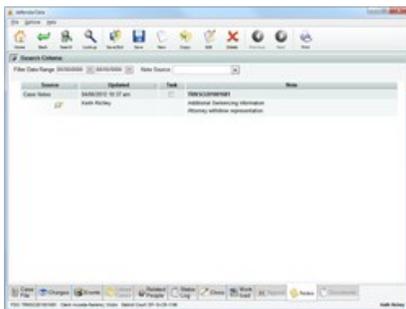
- **Note Content** - This is a powerful full-text search against Notes of all the following types:
  - Case Notes:
    - Additional Opening Information
    - Additional Closing Information
    - Additional Sentencing Information
    - Additional Client Information
  - Charge Notes
  - Event Notes:
    - Schedule
    - Ticklers
    - Time Entry
    - Expenses
  - Related People Notes:
    - Court
    - Non-Court
  - Workload Notes
  - Document Notes
- **Case Type** - Results can be restricted to specific types of cases (CR, SR, OT, PR, etc.)
- **Attorney** - Results can be restricted to cases assigned to a specific Attorney.
- **Status** - By selecting a Case Status such as "Open", only results for Open Cases will be found.

In the example shown below, all Notes containing "withdrew" are found for Ramon Amador-Duffey's Closed cases.



 [Enlarge picture](#)

To view each Note either double-click the row from the search results or select the row and then click the  **Edit** button. The associated case will be viewed with the highlighted Note shown.



 [Enlarge picture](#)

See also

- Case Search
- Name Search
- Document Search

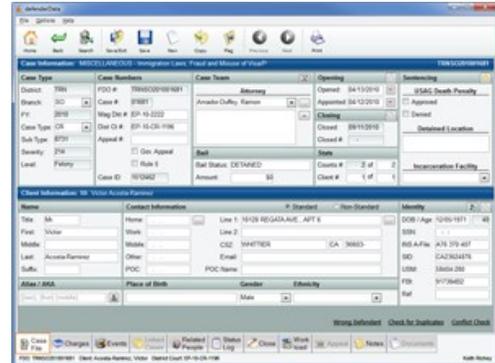
Home > Case Management

## Case Management

A new case can be created by selecting  **New** from the  [Find Case](#) screen or from the  [Case File](#) tab of an existing case.

An existing case can be viewed by selecting it from the  **My Recent Cases** pane on the  [Home Screen](#) or from the results of a search in the  [Search Menu](#).

When editing an existing case or when creating a new case, the screen to the right is displayed with the  [Case File](#) tab selected by default.



### Case Tabs

Select from the following options for more information about each Case Tab:



Case File



Charges



Events



Linked Cases

 [Enlarge picture](#)



Related People



Status Log



Close



Workload



Appeal



Notes



Documents

See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
- [Schedule Menu](#)
- [Timesheet](#)
- [Ticklers Menu](#)
- [Alerts Menu](#)
- [Tasks Menu](#)
- [Legal Pad](#)
- [Templates Menu](#)
- [Reports Menu](#)
- [Quick Reference Guide](#)
- [Admin Menu](#)

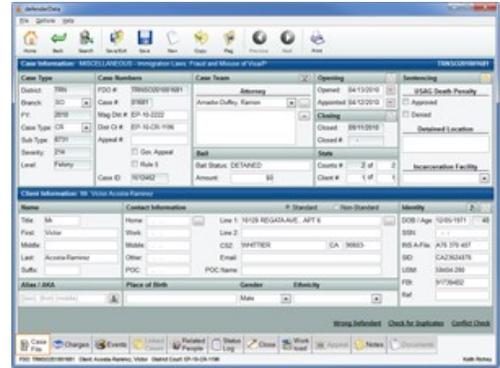
Home > Case Management > Case File

## Case File

This is the default tab which includes the primary Case Information and Client information.

The various tabs shown along the bottom of the screen are used to navigate throughout the case to view all case related details.

While navigating through each case tab, the status bar at the bottom of the application window will continue to display the client name and File Number.



**Note:** When creating a new case, the **Case Type, Client First Name and Last Name** must be specified before the new case can be saved.

The following links are shown in the lower right hand corner of the Case File tab:

**Wrong Client:** This link is used to detach the current client that is associated with the case so that a different client can be associated with the case.

**Check for Duplicates:** This link is used to check for a duplicate client record that already exists in the system. When selected, the **Duplicate Check** window will be displayed as shown below.

[Enlarge picture](#)



The main purpose for this feature is to check for client information that already exists in the system to prevent a duplicate from being created.

It's also possible to merge multiple duplicates together while selecting which client details should be retained. Multiple records can be selected using the **Merge** checkbox next to each record. Once the records to be merged have been selected, the fields to be kept are highlighted with a blue background. For instance, if one record has a Middle Name of "J" while another has a Middle Name of "John", click the Middle Name that you want to keep to highlight it blue.

[Enlarge picture](#)

**Note:** When multiple cases are merged together all Phone details are stored in the Phone Change Log, all Address details are stored in the Address Change Log and all Aliases are stored. The selected Phone, Address and Alias fields will become the primary contact information shown for the merged record.

When you're ready to complete the merge, select

the **Preview Merge** button and a preview of the records to be merged will be displayed as shown to the right.

The new client record is shown previewed along with the total number of cases for each client record included in the merge.

Select the **Case Involvement** tab to view additional details about each case as shown below.



To make changes to the selected client records

select the **Back** button. To

cancel the merge, select the **Cancel** button and to complete the merge select **Perform Merge**.

**Tip:** Once a merge is completed, all of the client's cases will be automatically linked together as shown on the **Linked Cases** tab.



[Enlarge picture](#)

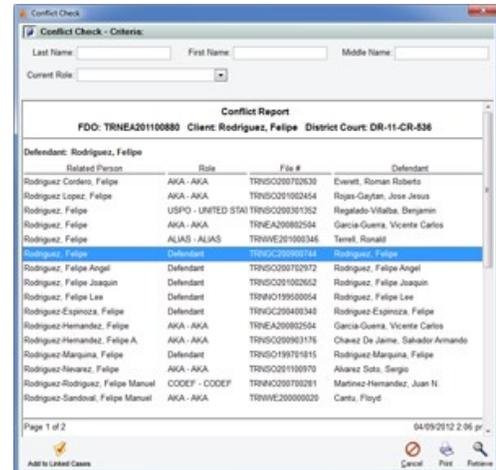
[Enlarge picture](#)

**Conflict Check:**

This link is used to search for potential conflicts that may already exist in the database. When selected, the **Conflict Check** window will be displayed as shown to the right.

A list of potentially conflicting cases will be displayed based on the client name and date of birth. A link can be created to the selected case(s) using the **Add to Linked Cases** button (hold the <Ctrl> key to select more than one case or the <Shift> key to select a range of cases). For more details, please see the [Linked Cases](#) section.

A new search may be executed by entering new criteria in the search fields and then clicking the **Retrieve** button. The **Print** button is used to print the list of conflicting cases and the **Cancel** button is used to close the Conflict Check window.

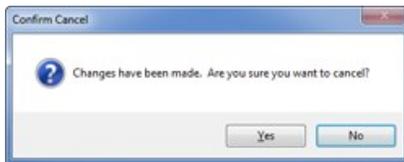


## Toolbar Button Descriptions



### Home

Use this button to cancel any edits and return to the Home Menu. If any changes have been made, you will be prompted to confirm that the changes will be cancelled as shown below.



[Enlarge picture](#)



### Back

Go back to the previous screen. If any changes have been made to the case, you will be prompted to save or cancel the changes.



### Search

This function is used to navigate back to the previously used [Search Menu](#) to find another case. Any results that were found by the previous search will still be displayed so that another match can be easily selected.



### Save

Save any changes that have been made



### New

Create a New Case.



### Copy

This function is used to copy information from the case currently being viewed. There are two options available in this window. Copy to:

1. **New Case** - This option is used to copy the selected details into a new case. Once selected, various information may be included or excluded using the corresponding checkboxes as shown below.



[Enlarge picture](#)

2. **Existing Case** - This option is used to copy details over to a case that already exists in the system. The "Copy Case" and "Copy Defendant" options aren't shown since they aren't applicable for this option.



[Enlarge picture](#)

Once selections have been made for either of the above options and you're ready to continue, select

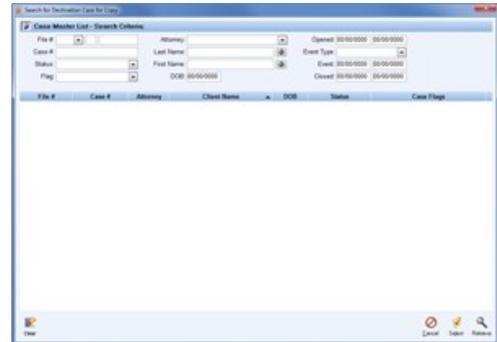
the **Ok** button to proceed or select **Cancel** to abort the copy.

For the **New Case** option you'll be taken into the new case with all of the selected details copied into it.

For the **Existing Case** option a search screen will be displayed as shown to the right so that you can find and select a destination case.

For additional instructions and tips for case search tips please see the [Case Search](#) section of this manual.

Once the destination case has been found, select it from the list and click **Select** to complete the Copy.



[Enlarge picture](#)



**Flag**

This function is used to add or remove Case Flags to the case. As shown to the right, Flags are shown on the lower left-hand corner of the **Case File** tab.

Case Flags can also be used as search parameters or report parameters when statistics are needed.

**Example:** A Red Flag called "Bench Warrant" could be used to automatically generate and print a "Memorandum in Support of Motion to Suppress". The area beneath the Client Information fields shows any Flags that have been added to the case (displayed in order of priority).



[Enlarge picture](#)



**Previous**

Navigate to the previous case found in the [Search Menu](#).



**Next**

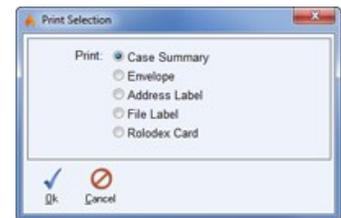
Navigate to the next case found in the [Search Menu](#).

**Tip:** If a case is opened from a list of 10 cases that were found by a search, the Previous and Next buttons could be used to cycle through all 10 cases without needing to return to the list of search results.



**Print**

Opens the **Print Selection** window to print various case-related details as shown to the right. Once an option is selected, click **Ok** to view a Print Preview.



[Enlarge picture](#)

User	Inherited Rights		Case Rights	
	View	Edit	View	Edit
Wright, Joe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case, John	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Smith, Frank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User: AdminData	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User: Guest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



**Security (Admin only)**

This function is used to override the the View and Edit rights to the case as shown to the left. **Inherited Rights** are the permissions inherited by each user based on their current account permissions. Exceptions can be set for the case currently being viewed by modifying the View & Edit rights under the **Case Rights** column.

In the example shown above, Joe Brown does not have access to the case base on his account permissions but he was given View only access and Frank Smith's access to the case was removed.

[Enlarge picture](#)

See also

- Charges
- Events
- Linked Cases
- Related People
- Status Log
- Close
- Workload
- Appeal
- Notes
- Documents

Home > Case Management > Charges

## Charges

While viewing a case select the  **Charges** Tab at the bottom of the screen to add, remove or prioritize charges on the case.

Click within any of the fields to select a Charge. The selected Charge is designated by the  icon.

### Toolbar Button Descriptions



**New**

Add a new Charge.



**Delete**

Delete the selected Charge.



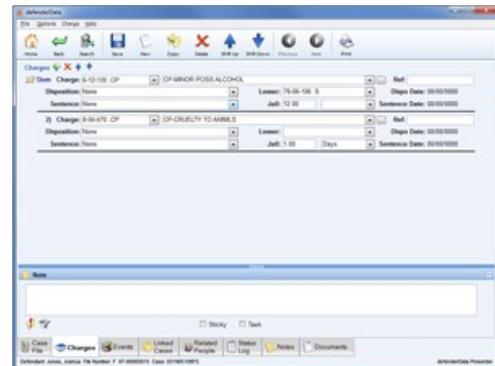
**Shift Up**

Raise the priority of the selected Charge.



**Shift Down**

Lower the priority of the selected Charge.



 [Enlarge picture](#)

### See also

- [Case File](#)
- [Events](#)
- [Linked Cases](#)
- [Related People](#)
- [Status Log](#)
- [Close](#)
- [Workload](#)
- [Appeal](#)
- [Notes](#)
- [Documents](#)

Home > Case Management > Events

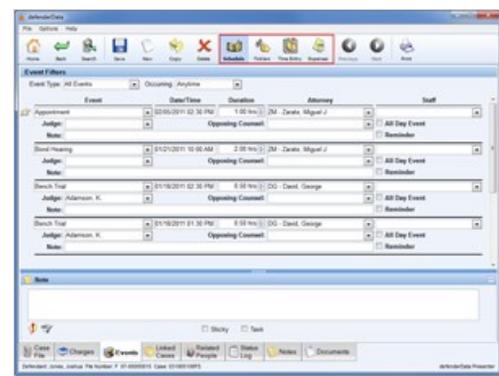
## Events

The  **Events** tab is used to schedule new Events and track a history of all Events related to the case.

Events are grouped into categories which are selected from the main toolbar as shown to the right, highlighted in red.

### Event Types

Selection a category below to learn more.



 [Enlarge picture](#)

### See also

- [Case File](#)
- [Charges](#)
- [Linked Cases](#)
- [Related People](#)

- Status Log
- Close
- Workload
- Appeal
- Notes
- Documents

Home > Case Management > Events > Schedule

## Schedule

To schedule new events on a case, select the  [Events](#) tab of the case and then the  **Schedule** button from the main toolbar.

This screen is used to track all calendared events. Any events scheduled here may also be viewed, modified and rescheduled on a calendar view by selecting the  [Events Menu](#) from the  [Home Screen](#).

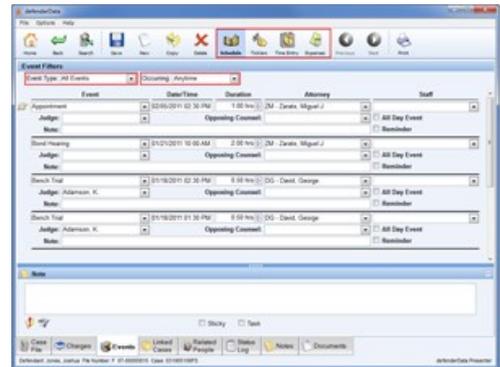
The Events shown on this tab can be filtered using the **Event Type** and **Occurring** picklists as shown to the right.

Click  **New** for each new Event to be added to the case.

To delete an entry, first select an entry by clicking anywhere on the highlighted row. The selected Event will be indicated with the  icon. Click the  **Delete** button in the toolbar to delete an entry

See also

- [Ticklers](#)
- [Time Entry](#)
- [Expenses](#)



 [Enlarge picture](#)

Home > Case Management > Events > Ticklers

## Ticklers

The  **Ticklers** screen is used to schedule a tickler which is shown with a Due Date and a Reminder on the  [Home Screen](#).

The Reminder specifies the numbers of days prior to the Due Date when the Tickler will become activated. Once a Tickler is marked completed, the date of completion will be recorded.

Click  **New** for each new Ticklers that should be added to the case.

To delete an entry, first select an entry by clicking anywhere on the highlighted row. The selected Tickler will be indicated with the  icon. Click the  **Delete** button in the toolbar to delete an entry

See also

- [Schedule](#)
- [Time Entry](#)
- [Expenses](#)



 [Enlarge picture](#)

Home > Case Management > Events > Time Entry

## Time Entry

To record your Time, select the  [Events](#) tab of the case and then the  **Time Entry** button from the main toolbar.

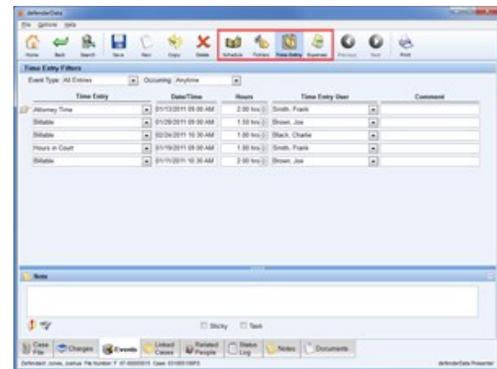
This screen is used to track time for work done related to the case and for reporting purposes. This screen can be configured to track entries such as "Time in Court", "Meeting with Client", "Billable", etc.

Click  **New** for each new Time Entry that should be added to the case.

To delete an entry, first select an entry by clicking anywhere on the highlighted row. The selected Time Entry will be indicated with the  icon. Click the  **Delete** button in the toolbar to delete an entry.

### See also

[Schedule](#)  
[Ticklers](#)  
[Expenses](#)



 [Enlarge picture](#)

[Home](#) > [Case Management](#) > [Events](#) > [Expenses](#)

## Expenses

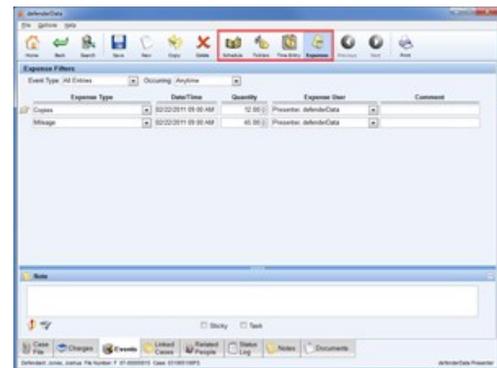
To log your expenses, select the  [Events](#) tab of the case and then the  **Expense** button from the main toolbar.

Click  **New** for each new Expense Entry that should be added to the case.

To delete an entry, first select an entry by clicking anywhere on the highlighted row. The selected Expense Entry will be indicated with the  icon. Click the  **Delete** button in the toolbar to delete an entry.

### See also

[Schedule](#)  
[Ticklers](#)  
[Time Entry](#)



 [Enlarge picture](#)

[Home](#) > [Case Management](#) > [Linked Cases](#)

## Linked Cases

The  **Linked Cases** tab displays links to other cases in the system. A linked case can be viewed by double-clicking anywhere on the row of the case you wish to view.

### Link Types

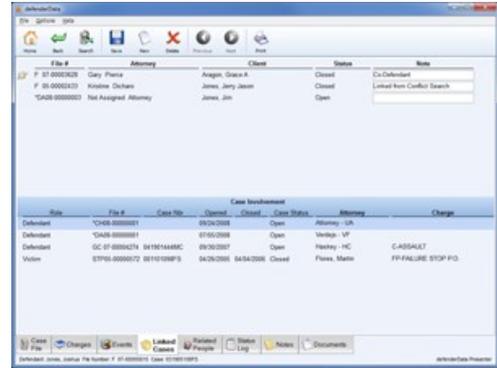
Two types of links are shown on this screen:

1. In the top half of the screen, manually created links to other cases in the system are shown.

The selected link will be indicated with the  icon. The  **New** button is used to create a new link and the  **Delete** button is used to delete the selected link.

When adding a new link, a search window opens which is used to find the desired case. For help with searching for a case, please see the [Case Search](#) section. Once the case has been found you can either double-click the case or highlight it and use the  **Select** button to choose it from the list of search results.

2. In the lower half of the screen links to other cases for the same client record are shown automatically. This list includes all cases regardless of the client's role on the case, such as Victim, Witness, Co-Defendant, etc.



 [Enlarge picture](#)

See also

- [Case File](#)
- [Charges](#)
- [Events](#)
- [Related People](#)
- [Status Log](#)
- [Close](#)
- [Workload](#)
- [Appeal](#)
- [Notes](#)
- [Documents](#)

Home > Case Management > Related People

## Related People

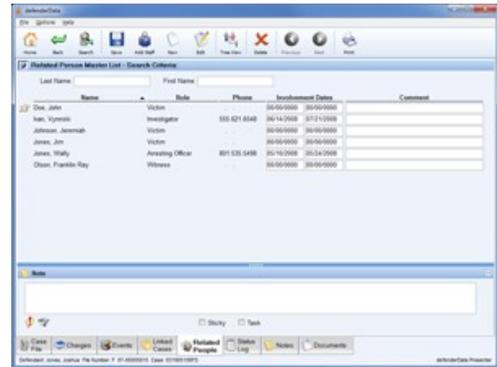
The  **Related People** tab is used to track all individuals related to the case.

There are generally three types of people added on this screen.

1. Staff Roles such as Arresting Officers, Investigators, Paralegals or Physicians for Mental Health type cases.
2. Family Roles such as Parent/Guardian, Mother, Father or Children for Dependency type cases.
3. All other individuals related to the case such as a Victim, Witness, Co-Defendant, etc.

The  **New** button is used to add new Related People to the case. The  **Add Staff** button is used to select staff members to be associated with the case.

The  icon indicates which Related Person is currently selected. Selected people can be edited using the  **Edit** button or deleted using the  **Delete** button.



 [Enlarge picture](#)

See also

- [Case File](#)
- [Charges](#)
- [Events](#)
- [Linked Cases](#)
- [Status Log](#)
- [Close](#)
- [Workload](#)
- [Appeal](#)
- [Notes](#)
- [Documents](#)

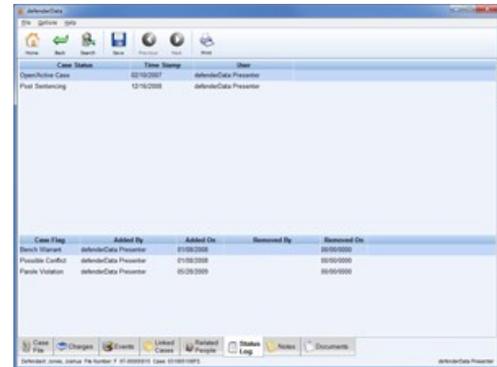
Home > Case Management > Status Log

## Status Log

Any modifications made to the Status of the Case or Flags activity is logged on the **Status Log** tab. 

As shown to the right, this screen is separated into two separate sections:

1. In the top half of the screen the history of when the case was originally opened and the name of the user that opened the case is shown. All additional status changes are also shown in chronological order.
2. In the lower half of the screen any Flags that have been added to the case are also tracked. The date each flag was added and removed along with the name of the individual that completed each action is shown.



The screenshot shows a software interface titled 'Administer Case'. It features two main data tables. The top table, 'Case Status', tracks the history of case status changes. The bottom table, 'Case Flag', tracks the addition and removal of flags on the case.

Case Status	Time Stamp	User
Open/Under Case	02/10/2007	AdministerCase Presenter
Final Reviewing	12/16/2008	AdministerCase Presenter

Case Flag	Added By	Added On	Removed By	Removed On
Search Warrant	AdministerCase Presenter	01/08/2008	00/00/0000	
Possibles Conf/Cl	AdministerCase Presenter	01/08/2008	00/00/0000	
Parole Violation	AdministerCase Presenter	05/08/2009	00/00/0000	

 [Enlarge picture](#)

## See also

[Case File](#)  
[Charges](#)  
[Events](#)  
[Linked Cases](#)  
[Related People](#)  
[Close](#)  
[Workload](#)  
[Appeal](#)  
[Notes](#)  
[Documents](#)

[Home](#) > [Case Management](#) > [Close](#)

## Close

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

## See also

[Case File](#)  
[Charges](#)  
[Events](#)  
[Linked Cases](#)  
[Related People](#)  
[Status Log](#)  
[Workload](#)  
[Appeal](#)  
[Notes](#)  
[Documents](#)

[Home](#) > [Case Management](#) > [Workload](#)

## Workload

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

## See also

[Case File](#)  
[Charges](#)  
[Events](#)  
[Linked Cases](#)  
[Related People](#)  
[Status Log](#)  
[Close](#)  
[Appeal](#)  
[Notes](#)  
[Documents](#)

[Home](#) > [Case Management](#) > [Appeal](#)

## Appeal

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

## See also

Case File  
Charges  
Events  
Linked Cases  
Related People  
Status Log  
Close  
Workload  
Notes  
Documents

## Home > Case Management > Notes

### Notes

All Notes can be created, modified, deleted and printed from this screen.

#### Note Sources

In addition to standard **Case Notes**, notes are grouped by Source for any notes created using the  **Note Panel** found at the bottom of the following case tabs:

-  [Charges](#)
-  [Events](#)
-  [Related People](#)
-  [Documents](#)

The **Search Criteria** section can be used to limit the Date Range of notes displayed in the list.

The  icon indicates which Note is currently selected. The selected Note can be edited or deleted using the  **Edit** and  **Delete** buttons.

To create a new Note, click the  **New** button which opens the **Note File Management** window as shown below.

When a new Note is created, an  **Alert** can be sent out to other users to notify them of the note. For more information please see the  [Alerts Menu](#).

When selecting Users to be Alerted, the  **Default** button can be used to select the default users that have been designated to receive Alerts based on the attorney assigned to the case.

A  **Task** can also be assigned to a Note by first enabling the Task checkbox and then selecting a user from the **Assigned to** picklist. For more information please see the  [Tasks Menu](#).

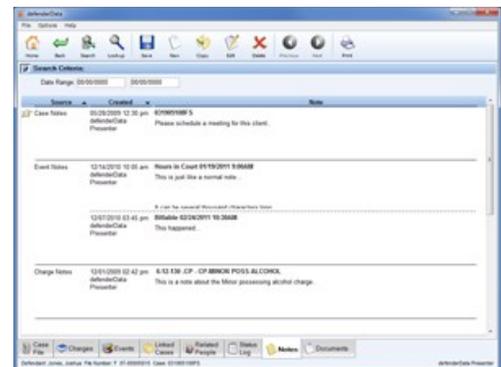
The  **Previous** and  **Next** buttons are used to navigate from one Note to the next.

## See also

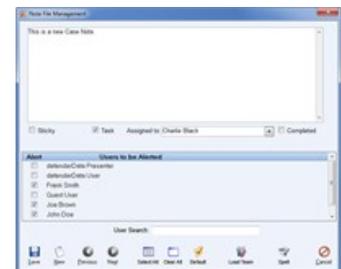
Case File  
Charges  
Events  
Linked Cases  
Related People  
Status Log  
Close  
Workload  
Appeal  
Documents

## Home > Case Management > Documents

### Documents



 [Enlarge picture](#)



 [Enlarge picture](#)





See also

- Case File
- Charges
- Events
- Linked Cases
- Related People
- Status Log
- Close
- Workload
- Appeal
- Notes

Home > Case Management > Documents > Primary Toolbar

## Primary Toolbar

The primary toolbar on the **Documents** tab includes many useful functions as described below.

### Toolbar Button Descriptions



**Home**

Use this button to return to the [Home Screen](#).



**Back**

Select this option to navigate back to the previously viewed case tab.



**Search**

This function is used to navigate back to the previously used [Search Menu](#) to find another case. Any results that were found by the previous search will still be displayed so that another match can be easily selected.



**New Doc**

This button is used to create a new document in the selected folder. When selecting this option a blank new document is created and opened in a new window as shown to the right.

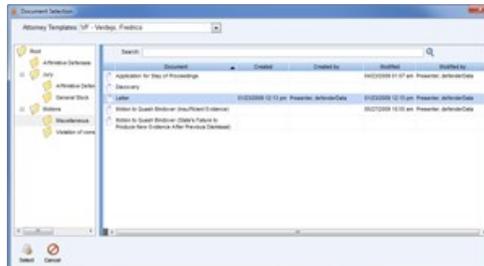
One the new document is saved you'll be prompted to provide a Document Name. Any documents created in this defenderData native format can be edited directly within the application by anyone with edit access to the client's case file. These documents can also be exported to common file formats such as Adobe PDF, MS Word or Rich Text.



**Template**

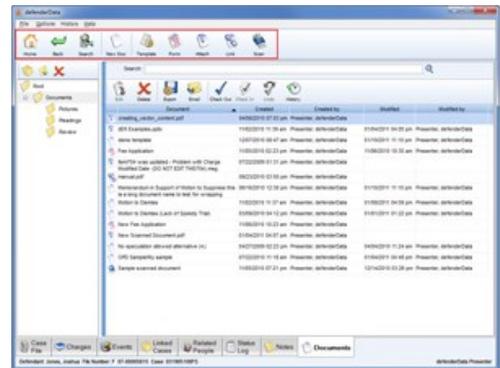
Used to create a new document based on an existing Template. When selecting this option the **Document Selection** window will be displayed for selecting the template to generate.

Next, select an attorney from the **Defender Templates** field to see a list of available templates.

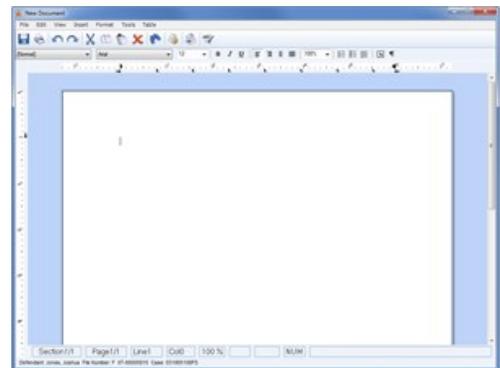


[Enlarge picture](#)

Once the correct template has been found, double-click the file or highlight it and click the **Select** button. **Note:** Automatically generated documents will be stored within an "Auto Docs" folder.



[Enlarge picture](#)

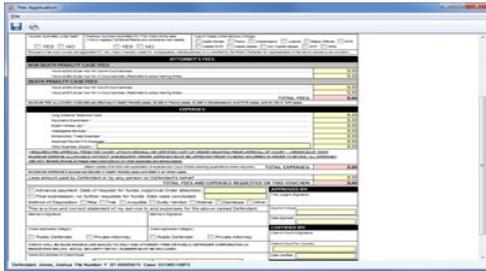


[Enlarge picture](#)



### Form

Forms are designed to restrict which areas of the document users can edit, similar to a fillable PDF.



[Enlarge picture](#)

In the example form shown to the left all fields highlighted red indicate values that are either automatically merged from the case file or automatically calculated. Fields highlighted yellow are the only areas of the document that can be edited by the user.

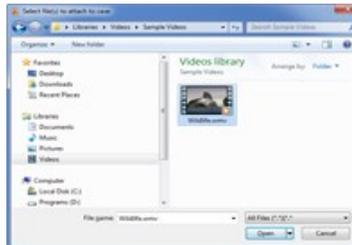


**Note:** Forms cannot be created or modified within the defenderData client software interface. They must be created and maintained by the defenderData Support team.



### Attach

To upload a file from your computer, first select the folder where the file will be saved and then click the Attach button. A file selection window will be opened as shown below. Browse to the location of the file to select it and then click **Open** to attach it to your case.



[Enlarge picture](#)



**Tip:** Emails can be dragged and dropped directly from Lotus Notes to a folder on the Documents tab. The email will be saved to the case in the Lotus Notes .eml format which will also include any attachments to the email.



### Link

This function is used to create a link to a document that's stored on your local network. When a file is Linked it won't actually be attached to the case, instead the Link simply acts as a shortcut to the file allowing you to easily open, view and edit the file.



**Note:** In order for a linked document to be accessible to other users they must be accessing it from the same local network with the ability to access to the file using the same relative path on your network.



### Scan

The Scan button is used to new document in the selected folder. To scan a new document, select the scanner connected to your computer from the Scanner field and then click the Scan button.

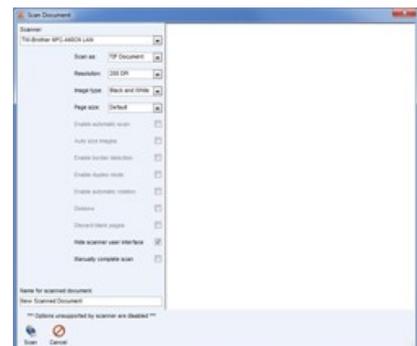
New documents can be scanned in either TIF or PDF format and all preferred scan settings will be remembered for future scans.



**Note:** Scanned TIF documents are indicated by the icon in the folder list. TIF documents can be viewed and Redacted directly within defenderData. For more details, please see the [Document Viewer](#) section of this manual.

### See also

Secondary Toolbar  
Document Editor  
TIF Viewer



[Enlarge picture](#)

[Home](#) > [Case Management](#) > [Documents](#) > [Secondary Toolbar](#)



## Secondary Toolbar

The secondary toolbar on the  **Documents** tab includes many useful functions that are used in conjunction with your existing documents.

 **Tip:** Each of the functions described in this section can be used with multiple documents selected at once. To select more than one document at a time either hold down the <Ctrl> key while clicking each document or hold the <Shift> key to select a range of documents.

### Toolbar Button Descriptions



**Edit**

Documents can be exported in a variety of formats on in their native format.



**Delete**

Documents can be exported in a variety of formats on in their native format.



**Export**

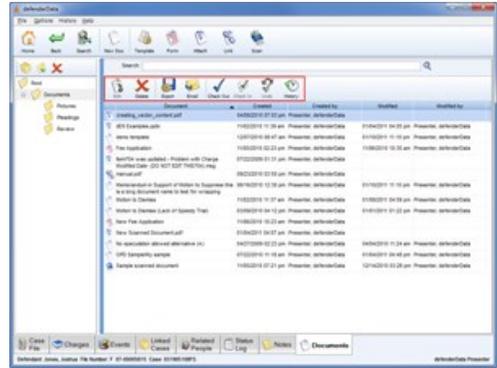
Documents can be exported in a variety of formats on in their native format.

When exporting native defenderData Documents (represented by the  icon) several format options are available as shown to the right. If a combination of document formats are batch exported the native defenderData Documents will be exported to PDF format by default.



**Email**

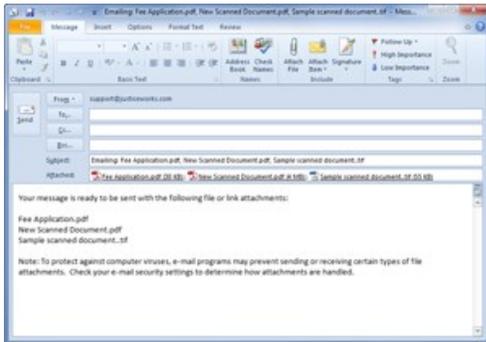
Exports the selected document(s) and attaches them to a new email within your default email program as shown in the example below.



 [Enlarge picture](#)



 [Enlarge picture](#)



 [Enlarge picture](#)



**Check Out**

When this function is used a copy of the selected document(s) will be saved to your computer and other users will not be able to edit the documents while you have them checked out for editing. However, users will still be able to view the last version of the document that was saved on the case prior to your check out.

When documents are checked out they'll automatically be opened in the native application as long as the native application is installed on your computer.



**Check In**

Once you've finished editing your checked out documents this function is used to check them back in. When documents are checked in you'll have the option of providing a **Version Comment** as shown to the right.



**Undo**

If you've checked out a document by mistake or no longer need to edit the document you can use this feature with the selected document to Undo Check Out.



 [Enlarge picture](#)



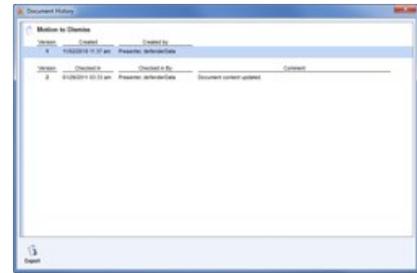
**History**

This feature is used to view a document version history for the selected document as shown to the right.

In the **Document History** window prior versions of the document can be exported by selecting the Version and then using the  **Export** button.

### See also

Primary Toolbar  
Document Editor  
TIF Viewer

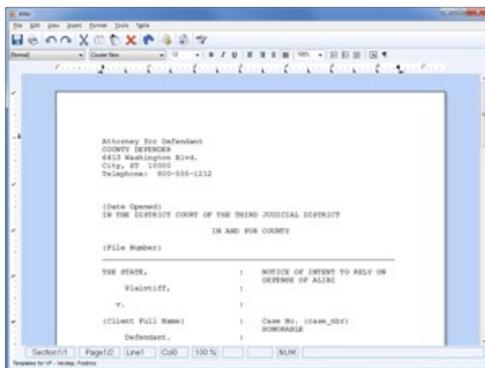


 [Enlarge picture](#)

[Home](#) > [Case Management](#) > [Documents](#) > [Document Editor](#)

## Document Editor

The document editor is used to modify the content of existing documents.



 [Enlarge picture](#)

## Toolbar Button Descriptions



### Back

Return to the document list and abort any changes.



### Save

Save changes to the current document.



### Print

Save changes to the current document.



### Undo

Undo the last modification.



### Redo

Redo the last modification that was removed using Undo.



### Cut

Delete and copy the selected text <Ctrl+X> .



### Copy

Copy the selected text <Ctrl+C> .

**Paste**

Paste text that was previously Copied/Cut <Ctrl+V> .

**Delete**

Delete the selected text or text following the cursor <DEL> .

**Find**

Opens the Find window to search for text <Ctrl+F> .

**Insert Template**

Opens the Template window (See below for details).

**Insert Merge Fields**

Opens the Merge Fields window (See below for details).

**Spell Check**

Checks the document for misspelled words.

## Inserting Templates

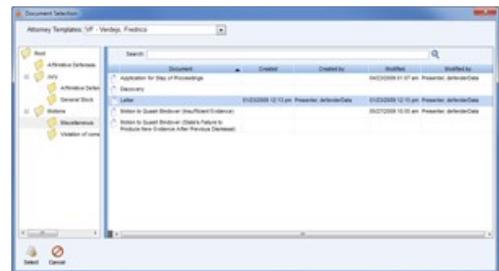
Templates are custom documents with pre-created content that are stored for each attorney. The  **Insert Template** button opens the Templates window as shown to the right.

Templates can be located for each attorney using the Defender Templates pick list at the top of the window. Once the desired template has been found, select it and then click the  **Insert** button to import the template into the current document. To exit without selecting a template, click the  **Close** button.

Next, select an attorney from the **Defender Templates** field to see a list of available templates. Once the correct template has been found, double-click the file or highlight it and click the  **Select** button. To exit without selecting a template, click the  **Close** button.



**Note:** The template will be inserted where the cursor is positioned within the document prior to clicking the  **Insert Template** button.



 [Enlarge picture](#)

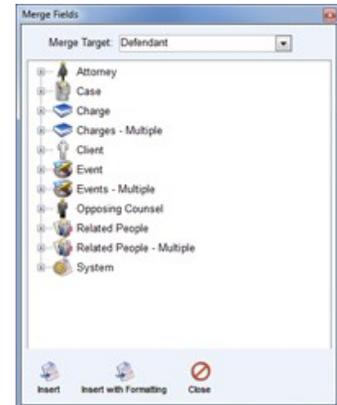
Once a template has been inserted, you will be returned to the document editor where further changes may be made or saved.

## Inserting Merge Fields

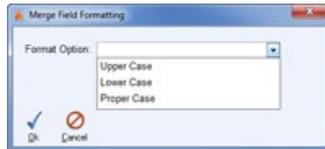
Merge Fields are pre-defined fields that can be inserted into a document. These fields will automatically insert related case details and other information (such as the current date) into the document when it's printed. The Merge Fields window, as shown to the right, is opened when using the  **Insert Merge Fields** button.

To insert a field, double-click the field name from the list or highlight the field and use the  **Insert** button.

To insert a merge field with specific formatting, highlight the field and use the  **Insert with Formatting** button.

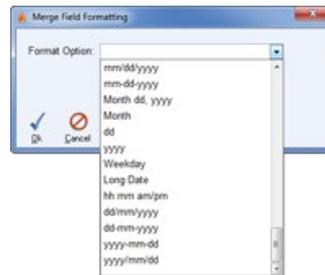


 [Enlarge picture](#)



 [Enlarge picture](#)

Example of the formatting window used for the Client First Name merge field.



 [Enlarge picture](#)

Example of the formatting window used for the Current Date merge field.

See also

Primary Toolbar  
Secondary Toolbar  
TIF Viewer

Home > Case Management > Documents > TIF Viewer

## TIF Viewer

Documents scanned or attached in TIF format can be viewed and redacted within defenderData.

Double-clicking a TIF document will launch an integrated viewer which contains controls for redactions, navigation between pages, zoom, fit to width/height, rotation and print as shown to the right.

See also

Primary Toolbar  
Secondary Toolbar  
Document Editor



 [Enlarge picture](#)

Home > Schedule Menu

## Schedule Menu

The Events Menu is used to manage calendared events for each user in the system. From this menu, events may be scheduled, rescheduled and deleted for each attorney using various viewing modes. To access Events, select the  **Schedule** button from the  [Home Screen](#).

### Preferences

Select the  **Prefs** button from the toolbar to configure your Event Preferences.



The Calendar Preferences window as shown to the left allows up to 5 users to be selected for the Group View. However, if you're primarily interested in just your own calendar, the additional entries can be left blank.

 **Note:** Your Event Preferences also determine which users Schedules are displayed under the  **Schedule** area of your  [Home Screen](#).

The Default View will determine which view is first shown each time you login.

### Calendar Views

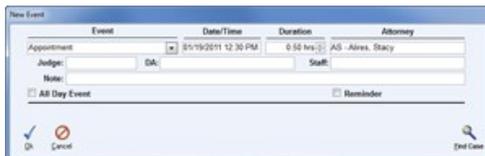
For more details about each view, please select from each of the following options:



 [Enlarge picture](#)

Existing events may be modified by double-clicking the event within any calendar view. New events may be created using the  **New** button. Events can be deleted by highlighting the event and clicking the  **Delete** button.

When creating a new event, the following Event window will be displayed.



 [Enlarge picture](#)

When a new event is created from the calendar it will not be associated to a case yet. If you'd like to associate a case to the Event, use the  **Find Case** button to open the case search window. Once the case has been located, highlight it and then click the  **Select** button. Once all selections have been made within the **New Event** window, select  **OK** to finish or  **Cancel** to abort.

The  **Previous** and  **Next** buttons in the main toolbar are used to cycle from one day to the next.

The  **Date Selection** button in the upper left corner of all calendar views can be used to toggle the mini calendar view off and on.

 **Tip:** In all calendar views, events can be rescheduled by simply dragging and dropping the event to a new timeslot. In addition, the duration of events can be modified by clicking and dragging the top or bottom edge of an event.

### See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
- [Case Management](#)
- [Timesheet](#)
- [Ticklers Menu](#)
- [Alerts Menu](#)

Tasks Menu  
 Legal Pad  
 Templates Menu  
 Reports Menu  
 Quick Reference Guide  
 Admin Menu

Home > Schedule Menu > Month View

## Month View

Select the  **Month** button from the  [Schedule Menu](#) to view events by month for the selected user.

Hold the mouse cursor over an event to see additional details about the event.

The attorney picklist in the upper right corner of each the calendar view is used to select the calendar for a different attorney.

While in the month view, use the  **Previous** and  **Next** buttons to cycle from one month to the next. In addition, the mini-calendar shown on the left-hand side can be used to select a specific month.

### See also

[Agenda View](#)  
[Week View](#)  
[Day View](#)  
[Group View](#)  
[Lotus Notes Sync](#)



 [Enlarge picture](#)

Home > Schedule Menu > Agenda View

## Agenda View

Select the  **Agenda** button from the  [Schedule Menu](#) to view events by work week for the selected user.

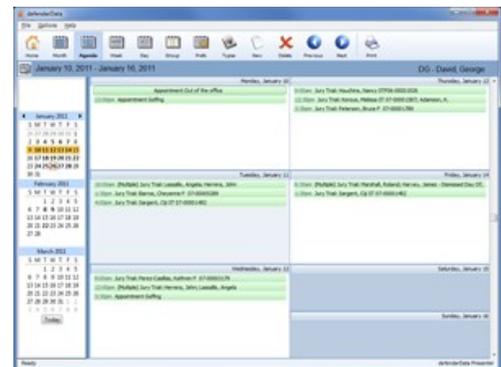
Hold the mouse cursor over an event to see additional details about the event.

The attorney picklist in the upper right corner of each the calendar view is used to select the calendar for a different attorney.

While in the month view, use the  **Previous** and  **Next** buttons to cycle from one week to the next. In addition, the mini-calendar shown on the left-hand side can be used to select a specific month.

### See also

[Month View](#)  
[Week View](#)  
[Day View](#)  
[Group View](#)  
[Lotus Notes Sync](#)



 [Enlarge picture](#)

Home > Schedule Menu > Week View

## Week View

Select the  **Week** button from the  [Schedule Menu](#) to view events by week for the selected user.

Hold the mouse cursor over an event to see additional details about the event.

The attorney picklist in the upper right corner of each the calendar view is used to select the calendar for a different attorney.

While in the month view, use the  **Previous** and  **Next** buttons to cycle from one week to the next. In addition, the mini-calendar shown on the left-hand side can be used to select a specific month.

**See also**

- [Month View](#)
- [Agenda View](#)
- [Day View](#)
- [Group View](#)
- [Lotus Notes Sync](#)



 [Enlarge picture](#)

Home > Schedule Menu > Day View

 **Day View**

Select the  **Day** button from the  [Events Menu](#) to view events by day for the selected user.

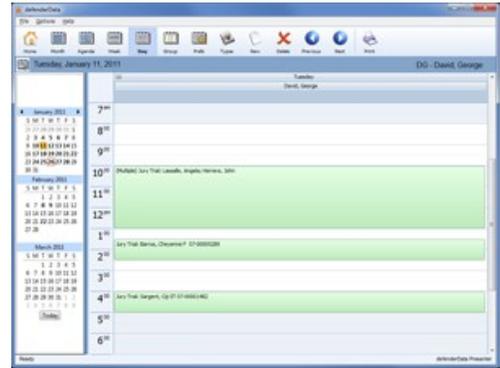
Hold the mouse cursor over an event to see additional details about the event.

The attorney picklist in the upper right corner of each the calendar view is used to select the calendar for a different attorney.

While in the month view, use the  **Previous** and  **Next** buttons to cycle from one day to the next. In addition, the mini-calendar shown on the left-hand side can be used to select a specific month.

**See also**

- [Month View](#)
- [Agenda View](#)
- [Week View](#)
- [Group View](#)
- [Lotus Notes Sync](#)



 [Enlarge picture](#)

Home > Schedule Menu > Group View

 **Group View**

Select the  **Group** button from the  [Schedule Menu](#) to view events for a group of users.

The Group View can be combined with each of the Calendar Views as shown in the samples below.

**Group - Day View**



 [Enlarge picture](#)



Home > Timesheet

## Timesheet

The Time Sheet is launched by selecting the  **Timesheet** icon from the  [Home Screen](#).

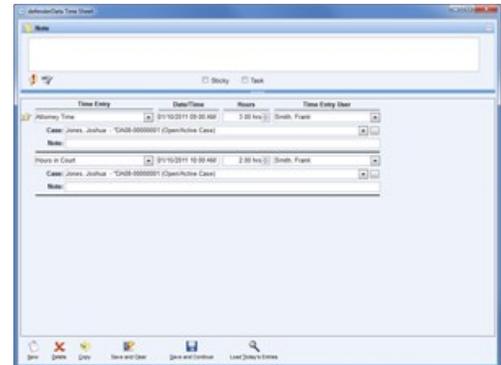
The primary differences with logging time on the Timesheet as opposed to the  [Time Entry](#) screen of the case is that multiple entries can be added for various cases without needing to access each case directly. This is often a more convenience and efficient method for logging time spent on your cases.

While using the Timesheet all edits will be saved automatically when the Timesheet window is closed or they can be saved manually by selecting  **Save and Continue**.

The Timesheet will automatically display new entries that have been added on the current date. However, the  **Save and Clear** button can be used to save your edits and clear them from view if you'd prefer to view a clean slate. To restore all previously cleared entries for the current date select the  **Load Today's Entries** button.

### See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
- [Case Management](#)
- [Schedule Menu](#)
- [Ticklers Menu](#)
- [Alerts Menu](#)
- [Tasks Menu](#)
- [Legal Pad](#)
- [Templates Menu](#)
- [Reports Menu](#)
- [Quick Reference Guide](#)
- [Admin Menu](#)



 [Enlarge picture](#)

[Home](#) > [Ticklers Menu](#)

## Ticklers Menu

The Ticklers Menu provides a full-screen view of your Ticklers as well as the ability to create new Ticklers or modify your existing Ticklers.

When a new Ticklers is created in this menu it's not initially linked to a case. While it's not required that Ticklers are linked to a case the **Attach to Case** button can be used to find and select the case to associate the Tickler with.

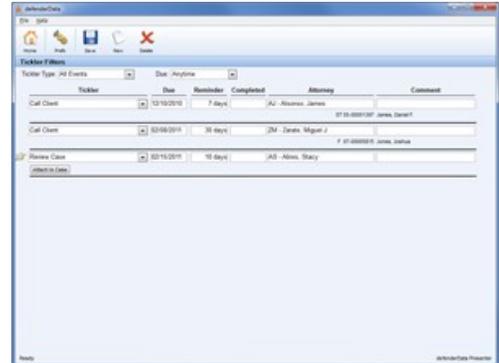
### Tickler Preferences

New Tickler users will need to configure their Preferences before Ticklers can be used. This is done by selecting the  **Prefs** button in the toolbar.



 [Enlarge picture](#)

The user names selected in your Tickler Pref will determine which Ticklers are shown. Up to four names can be selected but if you only wish to see your own Ticklers the four extra slots can be left blank.



 [Enlarge picture](#)

### See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
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- [Schedule Menu](#)
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- [Alerts Menu](#)
- [Tasks Menu](#)
- [Legal Pad](#)
- [Templates Menu](#)
- [Reports Menu](#)
- [Quick Reference Guide](#)
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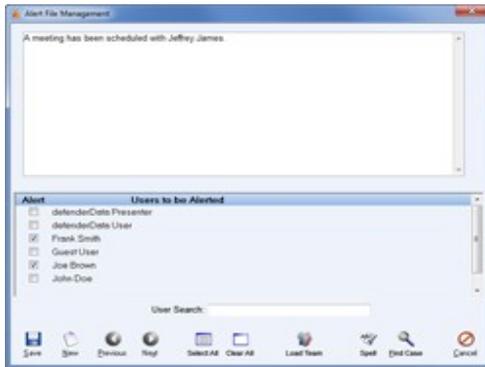
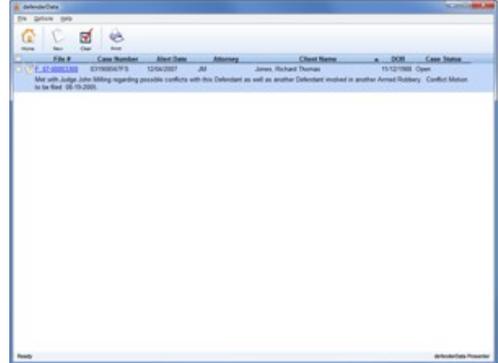
Home > Alerts Menu

## Alerts Menu

Alerts are used to notify users of a Note that has been added to case and other important information that may not be related to a specific case. To access Alerts, select the  **Alerts** button from the  [Home Screen](#).

All of your Alerts will be displayed on this screen, sorted by Client Name. Alerts that have been created from a Case Note (see the  [Notes](#) section for details) will include a blue hyperlink which can be used to access the case directly. Each Alert may be edited by clicking the  **Edit** icon which is displayed next to each note.

To clear an Alert, select the corresponding checkbox and then click the  **Clear** button. All Alerts can be selected at once by selecting the checkbox found in the column header.



The  **New** button is used to create a new Alert.

The Alert checkbox can be selected for each user that will receive the Alert. Use the  [Enlarge picture](#)

the  **Select All** button to select all users and the  **Clear All** button to deselect all users.

The  **Previous** and  **Next** buttons are used to navigate from one Alert to the next.

 [Enlarge picture](#)

See also

- Welcome
- Get Help
- Staff Training
- Admin Training
- Features Matrix
- Installation
- Login
- Home Screen
- Cases Menu
- Case Management
- Schedule Menu
- Timesheet
- Ticklers Menu
- Tasks Menu
- Legal Pad
- Templates Menu
- Reports Menu
- Quick Reference Guide
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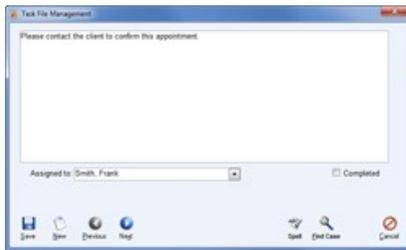
Home > Tasks Menu

## Tasks Menu

Tasks can be assigned to a user in connection to a Note that has been added to a case. Like Alerts, a Task can also be created that isn't associated with a case. To access Tasks, select the  **Tasks** button from the  [Home Screen](#).

All of your Tasks will be displayed on this screen, sorted by Client Name. Tasks that have been created from a Case Note (see the  [Notes](#) section for details) will include a blue hyperlink which can be used to access the case directly. Each Task may be edited by clicking the  **Edit** icon which is displayed next to each note.

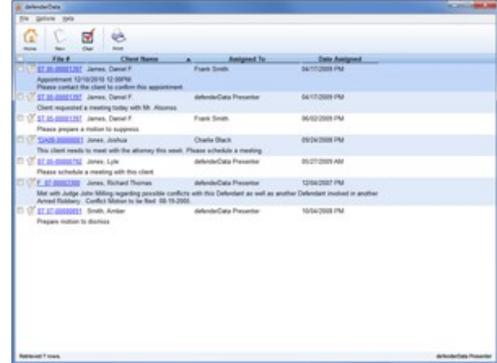
To clear a Task, select the corresponding checkbox and then click the  **Clear** button. All Tasks can be selected at once by selecting the checkbox found in the column header. The  **New** button is used to create a new Task as shown to the left.



 [Enlarge picture](#)

A Task may be assigned to one user by selecting the name from the **Assigned to** picklist. A Task can be cleared by selecting the **Completed** checkbox and then clicking the  **Save** button.

The  **Previous** and  **Next** buttons are used to navigate from one Task to the next.



 [Enlarge picture](#)

### See also

- Welcome
- Get Help
- Staff Training
- Admin Training
- Features Matrix
- Installation
- Login
- Home Screen
- Cases Menu
- Case Management
- Schedule Menu
- Timesheet
- Ticklers Menu
- Alerts Menu
- Legal Pad
- Templates Menu
- Reports Menu
- Quick Reference Guide
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Home > Legal Pad

## Legal Pad

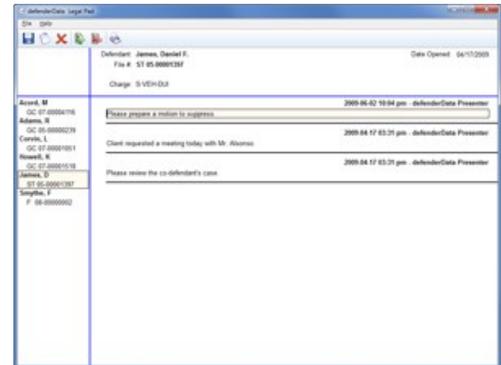
The Legal Pad is used to manage Notes for many cases at once. This tool is particularly useful in trial court where notes are added to many cases. To access the Legal Pad, select the **Legal Pad** button from the  [Home Screen](#).

All cases that have been added to the Legal Pad can easily be accessed from the left column as shown in the image to the right.

To create a new note for the selected case, click the  **New** button. To delete the selected note, click the  **Delete** button. Once all changes are complete, click the  **Save** button to save and exit.

The  **Add Case** button is used to add a new case to the Legal Pad and the  **Remove Case** button will remove the selected case from the Legal Pad.

 **Tip:** Multiple cases can be added to the Legal Pad at once from the Case Search screen by right-clicking the one of the search results and then selecting Add All to Legal Pad.



 [Enlarge picture](#)

### See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
- [Login](#)
- [Home Screen](#)
- [Cases Menu](#)
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- [Ticklers Menu](#)
- [Alerts Menu](#)
- [Tasks Menu](#)
- [Templates Menu](#)
- [Reports Menu](#)
- [Quick Reference Guide](#)
- [Admin Menu](#)

Home > Templates Menu

## Templates Menu

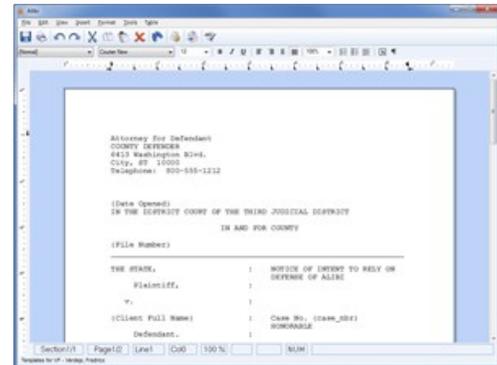
The defenderData client application includes a built in template management tool. To access Templates, select the  **Templates** button from the  [Home Screen](#).

A folder tree is displayed in the main display area which contains the document templates for the selected Attorney.

To create a new template, select the folder where the template will be stored and then click the  **New Doc** button. The selected template may also be deleted using the  **Delete** button or by pressing the <DEL> key.

An existing template may be edited by either double-clicking the template or selecting it and clicking the  **Edit** button. The template will then be displayed in the Document Editor as shown above.

For additional help with the editor, please see the [Document Editor](#) section.



 [Enlarge picture](#)

### See also

- [Welcome](#)
- [Get Help](#)
- [Staff Training](#)
- [Admin Training](#)
- [Features Matrix](#)
- [Installation](#)
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- [Home Screen](#)
- [Cases Menu](#)
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- [Timesheet](#)
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- [Alerts Menu](#)
- [Tasks Menu](#)
- [Legal Pad](#)
- [Reports Menu](#)
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- [Admin Menu](#)

Home > Reports Menu



## Reports Menu

The dD Client allows you to print a variety of reports. To print reports, select the **Reports** button from the  [Home Screen](#) as shown to the right.

### Menu Button Descriptions

These buttons are used to filter the list of available Reports by the following categories:



**All** - Selected by default, includes reports of all types.



**Attorney** - Reports with details and totals by Attorney.



**Charge** - Reports with details and totals by Charge.



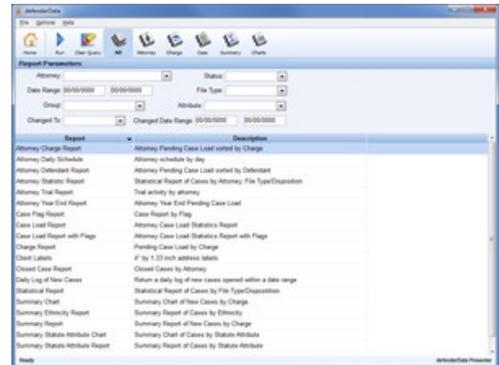
**Case** - Reports which include individual case information.



**Summary** - Statistical Reports.



**Time** - Time keeping Reports.



[Enlarge picture](#)

### Report Parameters

When a report has been selected, the customized Report Parameters will be displayed. These parameters include sorting options and filters which are used to control the scope of documents to be included in the report. Each specific report has its own Report Parameters.



**Caution:** Leaving all Report Parameters blank will cause the report to retrieve as much data as possible. For many reports, this can take a very long time. A report can be aborted at any time by pressing the **<ESC>** key.

The  **Clear** button can be used to reset the Report Parameters. Once the desired Parameters have been set, click the  **Run** button to run the report.



**Note:** While a report is still running it can be aborted by pressing the **<ESC>** key.

### See also

[Welcome](#)  
[Get Help](#)  
[Staff Training](#)  
[Admin Training](#)  
[Features Matrix](#)  
[Installation](#)  
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[Schedule Menu](#)  
[Timesheet](#)  
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[Home](#) > [Quick Reference Guide](#)

## Quick Reference Guide

Various shortcut keys are available throughout the application, the following list details which shortcuts can be used in each area.



### Global

F1	Online Help Manual
F5	Previous Tab
F6	Next
Ctrl+F4	Back
Ctrl+H	Home
Ctrl+P	Print
Alt+C	Clear Query
Alt+F4	Exit
Enter	Execute Query
F12	Combine Lookup
Tab	Next Field



### Documents

Ctrl+N	New Document
Ctrl+D	Deleted selected Document(s)
Delete	Deleted selected Document(s)
F2	Rename selected Document



### Timesheet

Enter	New Entry
Alt+N	New Entry
Alt+S	Save and Continue
Alt+L	Save and Clear
Alt+C	Copy Selected
Alt+D	Delete Selected
Alt+T	Load Today's Entries
Alt+R	Load Custom Range
Ctrl+Tab	Toggle to Note Panel
Date Field:	
T	Today's date
+	Plus a day
-	Minus a day
*	Plus a month
/	Minus a month
]	Plus a year
[	Minus a year
M	First day of the month
H	Last day of the month
Y	First day of the year
R	Last day of the year
Q	First day of the quarter
U	Last day of the quarter
C	Date Selection Calendar



### Case Edit

Ctrl+1	Case File Tab
Ctrl+2	Charges Tab
Ctrl+3	Events Tab
Ctrl+4	Linked Cases Tab
Ctrl+5	Related People Tab
Ctrl+6	Status Log Tab
Ctrl+7	Close Tab
Ctrl+8	Workload Tab
Ctrl+9	Appeal Tab
Ctrl+0	Notes Tab
Ctrl+ -	Documents Tab
Ctrl+F2	Copy Case
Ctrl+S	Save and Exit
F10	Save and New
F11	Save and Continue
Alt+P	Previous Case
Alt+N	Next Case
Alt+C	Conflict Check
Alt+D	Check for Duplicates
Alt+S	Search Existing
Alt+W	Wrong Client

### See also

[Welcome](#)  
[Get Help](#)  
[Staff Training](#)  
[Admin Training](#)  
[Features Matrix](#)  
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[Timesheet](#)  
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Home > Admin Menu > People Admin > Security > Email Login

## Dispositions Appendix

[View PDF](#)

 AA	Amendment Appeal
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
 AA2	Amendment Appeal (second round)
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
 AC	Amicus
321	APPEAL - Supreme Court (Specify in Notes)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased

- ⊕ AF      Appeal of a Civil Asset Forfeiture
  - 306 APPEAL - Court of Appeals by US: Affirmed
  - 307 APPEAL - Court of Appeals by US: Reversed/Vacated
  - 308 APPEAL - Court of Appeals by US: Remanded
  - 309 APPEAL - Court of Appeals by US: Dismissed
  - 310 APPEAL - Court of Appeals by US: Aff/Rev (in part)
  - 311 APPEAL - Court of Appeals by Client: Affirmed
  - 312 APPEAL - Court of Appeals by Client: Reversed
  - 313 APPEAL - Court of Appeals by Client: Remanded
  - 314 APPEAL - Court of Appeals by Client: Dismissed

315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ ANCPRO Ancillary Proceedings</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
815	OTHER - Bond Continued/Revoked (Specify in Notes)
827	OTHER - Charges Not Filed/Action Not Pursued
837	OTHER - Restitution Order Amended
<b>+ APM Magistrate Decision</b>	
301	APPEAL - District Court: Affirmed
302	APPEAL - District Court: Reversed/Vacated
303	APPEAL - District Court: Remanded
304	APPEAL - District Court: Dismissed
305	APPEAL - District Court: Aff/Rev (in part)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ BP Bail / Presentment</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
815	OTHER - Bond Continued/Revoked (Specify in Notes)
<b>+ CA Other matters</b>	
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed

315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
322	Anders Brief ( Specify in Notes the Ruling)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<hr/>	
	CAO Circuit Argument Only
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
831	OTHER - Circuit Argument Only Completed
<hr/>	
	CCA Co-Counsel Appointment
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<hr/>	
	CCC Criminal or Civil Contempt
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
804	OTHER - Criminal/Civil Contempt
808	OTHER - Defendant Deceased
<hr/>	
	CCO Conflict Counsel
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<hr/>	
	CD Court Directed Prisoner Representation
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased

+	CF	Civil Asset Forfeiture Representation
	601	COUNSEL RELIEVED - Substitution Appointed
	602	COUNSEL RELIEVED - Substitution Retained
	603	COUNSEL RELIEVED - Defendant Waived Counsel
	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
+	CK	Crack cocaine retroactive amendment
	504	SENTENCE MOTION - Granted
	505	SENTENCE MOTION - Denied
	506	SENTENCE MOTION - Dismissed
	601	COUNSEL RELIEVED - Substitution Appointed
	602	COUNSEL RELIEVED - Substitution Retained
	603	COUNSEL RELIEVED - Defendant Waived Counsel
	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
+	CK2	Crack cocaine retroactive amendment (second round)
	504	SENTENCE MOTION - Granted
	505	SENTENCE MOTION - Denied
	506	SENTENCE MOTION - Dismissed
	601	COUNSEL RELIEVED - Substitution Appointed
	602	COUNSEL RELIEVED - Substitution Retained
	603	COUNSEL RELIEVED - Defendant Waived Counsel
	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
+	CONSUL	Consultations
	212	Rule 5 - Transferred - District Court
	601	COUNSEL RELIEVED - Substitution Appointed
	602	COUNSEL RELIEVED - Substitution Retained
	603	COUNSEL RELIEVED - Defendant Waived Counsel
	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
	827	OTHER - Charges Not Filed/Action Not Pursued
+	CR	Criminal
	101	Guilty Plea - Magistrate Court
	102	Nolo Contendere Plea - Magistrate Court
	103	Guilty After Jury Trial - Magistrate Court
	104	Guilty After Court/Bench Trial - Magistrate Court
	105	Not Guilty After Jury Trial - Magistrate Court
	106	Not Guilty After Court/Bench Trial - Magistrate Court
	108	DISMISSAL
	109	OTHER (Specify in the Notes)
	201	Guilty Plea - District Court
	202	Nolo Contendere Plea - District Court
	203	Guilty After Jury Trial - District Court

204	Guilty After Court/Bench Trial - District Court
205	Not Guilty After Jury Trial - District Court
206	Not Guilty After Court/Bench Trial - District Court
208	DISMISSAL of Complaint - District Court
209	DISMISSAL of Indictment - District Court
210	DISMISSAL of Information - District Court
211	NEW TRIAL - District Court
212	Rule 5 - Transferred - District Court
213	Rule 20 - Transferred - District Court
214	Rule 21 - Transferred - District Court
216	Pretrial Diversion Type 2 - District Court (Charges Filed)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
803	OTHER - Juvenile Delinquent
808	OTHER - Defendant Deceased
826	OTHER - Forfeit of Collateral
<hr/>	
	D1 HC Challenge to state sentence
301	APPEAL - District Court: Affirmed
302	APPEAL - District Court: Reversed/Vacated
303	APPEAL - District Court: Remanded
304	APPEAL - District Court: Dismissed
305	APPEAL - District Court: Aff/Rev (in part)
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<hr/>	
	D2 Fed. Cap. Pros. (& Direct appeal)
201	Guilty Plea - District Court
203	Guilty After Jury Trial - District Court
204	Guilty After Court/Bench Trial - District Court
204	Guilty After Court/Bench Trial - District Court
204	Guilty After Court/Bench Trial - District Court
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated

308 APPEAL - Court of Appeals by US: Remanded  
 309 APPEAL - Court of Appeals by US: Dismissed  
 310 APPEAL - Court of Appeals by US: Aff/Rev (in part)  
 311 APPEAL - Court of Appeals by Client: Affirmed  
 312 APPEAL - Court of Appeals by Client: Reversed  
 313 APPEAL - Court of Appeals by Client: Remanded  
 314 APPEAL - Court of Appeals by Client: Dismissed  
 315 APPEAL - Court of Appeals by Client: Aff/Rev (in part)  
 316 APPEAL - Court of Appeals: OTHER  
 601 COUNSEL RELIEVED - Substitution Appointed  
 602 COUNSEL RELIEVED - Substitution Retained  
 603 COUNSEL RELIEVED - Defendant Waived Counsel  
 604 COUNSEL RELIEVED - Conflict of Interest  
 801 OTHER - Miscellaneous/Services Completed/Consultation  
 808 OTHER - Defendant Deceased

⊕ D3 Motion attacking sentence (2255)

306 APPEAL - Court of Appeals by US: Affirmed  
 307 APPEAL - Court of Appeals by US: Reversed/Vacated  
 308 APPEAL - Court of Appeals by US: Remanded  
 309 APPEAL - Court of Appeals by US: Dismissed  
 310 APPEAL - Court of Appeals by US: Aff/Rev (in part)  
 311 APPEAL - Court of Appeals by Client: Affirmed  
 312 APPEAL - Court of Appeals by Client: Reversed  
 313 APPEAL - Court of Appeals by Client: Remanded  
 314 APPEAL - Court of Appeals by Client: Dismissed  
 315 APPEAL - Court of Appeals by Client: Aff/Rev (in part)  
 316 APPEAL - Court of Appeals: OTHER  
 601 COUNSEL RELIEVED - Substitution Appointed  
 602 COUNSEL RELIEVED - Substitution Retained  
 603 COUNSEL RELIEVED - Defendant Waived Counsel  
 604 COUNSEL RELIEVED - Conflict of Interest  
 801 OTHER - Miscellaneous/Services Completed/Consultation  
 808 OTHER - Defendant Deceased

⊕ D4 Other

306 APPEAL - Court of Appeals by US: Affirmed  
 307 APPEAL - Court of Appeals by US: Reversed/Vacated  
 308 APPEAL - Court of Appeals by US: Remanded  
 309 APPEAL - Court of Appeals by US: Dismissed  
 310 APPEAL - Court of Appeals by US: Aff/Rev (in part)  
 311 APPEAL - Court of Appeals by Client: Affirmed  
 312 APPEAL - Court of Appeals by Client: Reversed  
 313 APPEAL - Court of Appeals by Client: Remanded  
 314 APPEAL - Court of Appeals by Client: Dismissed  
 315 APPEAL - Court of Appeals by Client: Aff/Rev (in part)  
 316 APPEAL - Court of Appeals: OTHER  
 321 APPEAL - Supreme Court (Specify in Notes)  
 322 Anders Brief ( Specify in Notes the Ruling)  
 323 Defendant Executed  
 601 COUNSEL RELIEVED - Substitution Appointed  
 602 COUNSEL RELIEVED - Substitution Retained  
 603 COUNSEL RELIEVED - Defendant Waived Counsel

604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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 D5	Redesig from D2 : No Death Sought by Govt
201	Guilty Plea - District Court
201	Guilty Plea - District Court
203	Guilty After Jury Trial - District Court
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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 D6	Redesig from D2 : Life Verdict After Trial
203	Guilty After Jury Trial - District Court
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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 D7	State Clemency Sought from a State Cap Conv
317	State Clemency Denied
318	State Clemency Granted
323	Defendant Executed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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 D8	Federal Clemency Sought from a Fed Cap Conv

319	Federal Clemency Denied
320	Federal Clemency Granted
323	Defendant Executed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ DCP</b>	<b>Drug Court Participant</b>
848	<b>OTHER – Drug Court Graduate</b>
849	<b>OTHER – Drug Court Termination Unsuccessful</b>
850	<b>OTHER – Drug Court Termination Voluntary</b>
<b>+ DPAC</b>	<b>Capital Case Amicus Curiae</b>
321	APPEAL - Supreme Court (Specify in Notes)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ DPCC</b>	<b>Capital Case Co-Counsel</b>
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ DPCD</b>	<b>Capital Prisoner Consultation</b>
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ DPCO</b>	<b>Capital Case Conflict Counsel</b>
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ DPSB</b>	<b>Capital Case Stand-by or Advisory Counsel</b>
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest

801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ EXTRAD</b> Extradition	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
834	OTHER - Extradited
<b>+ FAO</b> First Appearance Only	
212	Rule 5 - Transferred - District Court
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ GCP</b> Gang Court Participant	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
851	OTHER - Gang Court Graduate
852	OTHER - Gang Court Termination Unsuccessful
853	OTHER - Gang Court Termination Voluntary
<b>+ HA</b> Non-Capital Habeas	
301	APPEAL - District Court: Affirmed
302	APPEAL - District Court: Reversed/Vacated
303	APPEAL - District Court: Remanded
304	APPEAL - District Court: Dismissed
305	APPEAL - District Court: Aff/Rev (in part)
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel

604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/>	HC Habeas Corpus (Non-Capital State)
501	HABEAS CORPUS - Granted
502	HABEAS CORPUS - Denied
503	HABEAS CORPUS - Dismissed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/>	JU Juror Representation
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/>	LU Line-Up
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
827	OTHER - Charges Not Filed/Action Not Pursued
<input type="checkbox"/>	M4243A Mental Disease 4243(a)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/>	M4243C Mental Disease 4243(c)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/>	M4243E Mental Disease 4243(e)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel

604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4243F Mental Disease 4243(f)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4243G Mental Disease 4243(g)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4245A Mental Disease 4245(a)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4246A Mental Disease 4246(a)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4246E Mental Disease 4246(e)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4246F Mental Disease 4246(f)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel

604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4248A Mental Disease 4248(a)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4248E Mental Disease 4248(e)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ M4248F Mental Disease 4248(f)</b>	
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
702	MISCELLANEOUS - Committed/Incompetent
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ MA Motion Attacking Sentence - HC (Non-Capital Fed)</b>	
501	HABEAS CORPUS - Granted
502	HABEAS CORPUS - Denied
503	HABEAS CORPUS - Dismissed
504	SENTENCE MOTION - Granted
505	SENTENCE MOTION - Denied
506	SENTENCE MOTION - Dismissed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+ MC Motion to Correct or Reduce (Rule 35)</b>	
504	SENTENCE MOTION - Granted
505	SENTENCE MOTION - Denied
506	SENTENCE MOTION - Dismissed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel

604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> MHC	Mental Health Court Participant
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
857	OTHER - Mental Health Court Graduate
858	OTHER - Mental Health Court Termination Unsuccessful
859	OTHER - Mental Health Court Termination Voluntary
<b>+</b> MNT	Motion for New Trial
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> MOP	Modification of Probation
400	PROBATION - Modified
402	PROBATION - Restored/Continued
403	PROBATION - Terminated
406	PAROLE - Terminated
408	PROBATION - Extended
414	SUPERVISE RELEASE - Modified
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> ODC	Drug Court Participant
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
848	OTHER - Drug Court Graduate
849	OTHER - Drug Court Termination Unsuccessful
850	OTHER - Drug Court Termination Voluntary
<b>+</b> ODSPT	Prisoner Transfer Assigned by ODS
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest

801	OTHER - Miscellaneous/Services Completed/Consultation
807	OTHER - Prisoner Transfer
808	OTHER - Defendant Deceased
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<input type="checkbox"/> OT	Other
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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<input type="checkbox"/> PA	Parole Revocation
212	Rule 5 - Transferred - District Court
404	PAROLE - Revoked
405	PAROLE - Restored/Continued
406	PAROLE - Terminated
407	PAROLE - Referred to Institution
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<hr/>	
<input type="checkbox"/> PD	Pretrial Diversion
212	Rule 5 - Transferred - District Court
215	Pretrial Diversion Type 1 - District Court (Charges Filed)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
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<input type="checkbox"/> PL	Appeal of a Parole Commission Decision
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
314	APPEAL - Court of Appeals by Client: Dismissed
316	APPEAL - Court of Appeals: OTHER
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest

801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> PO	Petty Offenses
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> PP	Pre-Petition
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> PR	Probation Revocation
212	Rule 5 - Transferred - District Court
213	Rule 20 - Transferred - District Court
400	PROBATION - Modified
401	PROBATION - Revoked
402	PROBATION - Restored/Continued
403	PROBATION - Terminated
408	PROBATION - Extended
409	PROBATION - Dismissed
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> PT	Prisoner Transfer
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> PTR	Pretrial Release
212	Rule 5 - Transferred - District Court
213	Rule 20 - Transferred - District Court
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased

<input type="checkbox"/> PTS	Prisoner Transfer Sentencing
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
807	OTHER - Prisoner Transfer
808	OTHER - Defendant Deceased
<input type="checkbox"/> PTT	Prisoner Transfer and Detention
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
807	OTHER - Prisoner Transfer
808	OTHER - Defendant Deceased
<input type="checkbox"/> RHO	Remanded - Habeas or Other
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/> RTL	Remanded - Trial Level
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<input type="checkbox"/> SA	Appeal of Final Sentence/Conviction Based on Plea
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
322	Anders Brief ( Specify in Notes the Ruling)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond

801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> SB	Standby or Advisory Counsel
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> SC	Supreme Court (cert. granted)
321	APPEAL - Supreme Court (Specify in Notes)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> SI	Simmons
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> SO	Sentencing Only
101	Guilty Plea - Magistrate Court
104	Guilty After Court/Bench Trial - Magistrate Court
201	Guilty Plea - District Court
202	Nolo Contendere Plea - District Court
203	Guilty After Jury Trial - District Court
204	Guilty After Court/Bench Trial - District Court
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
813	OTHER - Sentencing/Re-Sentencing
<b>+</b> SR	Supervised Release
212	Rule 5 - Transferred - District Court
213	Rule 20 - Transferred - District Court
407	PAROLE - Referred to Institution
410	SUPERVISE RELEASE - Revoked
411	SUPERVISE RELEASE - Terminated
412	SUPERVISE RELEASE - Restored/Continued
413	SUPERVISE RELEASE - Dismissed
414	SUPERVISE RELEASE - Modified

415	SUPERVISE RELEASE - Extended
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> SS	State Statutes
103	Guilty After Jury Trial - Magistrate Court
106	Not Guilty After Court/Bench Trial - Magistrate Court
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> TD	Trial disposition
105	Not Guilty After Jury Trial - Magistrate Court
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
311	APPEAL - Court of Appeals by Client: Affirmed
312	APPEAL - Court of Appeals by Client: Reversed
313	APPEAL - Court of Appeals by Client: Remanded
314	APPEAL - Court of Appeals by Client: Dismissed
315	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
316	APPEAL - Court of Appeals: OTHER
322	Anders Brief ( Specify in Notes the Ruling)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
701	MISCELLANEOUS - Failure to Appear/Abscond
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
<b>+</b> VCP	Veterans Court Participant
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
854	OTHER - Veterans Court Graduate
855	OTHER - Veterans Court Termination Unsuccessful
856	OTHER - Veterans Court Termination Voluntary
<b>+</b> WI	Witness
102	Nolo Contendere Plea - Magistrate Court

102	Nolo Contendere Plea - Magistrate Court
202	Nolo Contendere Plea - District Court
202	Nolo Contendere Plea - District Court
202	Nolo Contendere Plea - District Court
205	Not Guilty After Jury Trial - District Court
205	Not Guilty After Jury Trial - District Court
205	Not Guilty After Jury Trial - District Court
205	Not Guilty After Jury Trial - District Court
206	Not Guilty After Court/Bench Trial - District Court
206	Not Guilty After Court/Bench Trial - District Court
206	Not Guilty After Court/Bench Trial - District Court
206	Not Guilty After Court/Bench Trial - District Court
306	APPEAL - Court of Appeals by US: Affirmed
307	APPEAL - Court of Appeals by US: Reversed/Vacated
308	APPEAL - Court of Appeals by US: Remanded
309	APPEAL - Court of Appeals by US: Dismissed
310	APPEAL - Court of Appeals by US: Aff/Rev (in part)
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
839	OTHER - Witness Representation Completed
<hr/>	
+	WW      Witness for a Grand Jury, a Federal Agency or Congress
601	COUNSEL RELIEVED - Substitution Appointed
602	COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	COUNSEL RELIEVED - Conflict of Interest
801	OTHER - Miscellaneous/Services Completed/Consultation
808	OTHER - Defendant Deceased
839	OTHER - Witness Representation Completed

See also

[Home](#) > [Admin Menu](#)

## Admin Menu

The Admin Menu is separated into two categories, select an option below to learn more:



[Home](#) > [Admin Menu](#) > [Case Admin](#)

## Case Admin

Case Admin mode contains the following sub-menus, select an option to learn more:



See also  
[People Admin](#)

[Home](#) > [Admin Menu](#) > [Case Admin](#) > [File Type](#)

## File Type

This menu displays all File Types for the purpose of configuring Autodocs and Ticklers. Edit each File Type by either double-clicking or by selecting  **Edit** for the selected type.

Select from the tabs shown across the bottom of the screen:

- **Disposition** - Includes the valid Dispositions for the edited Case Type.
- **Sentence** - Includes the valid Sentences for the edited Case Type.
- **Status Ticklers** - Manage Case Status Ticklers for the Closed and Open status.
- **Flag Ticklers** - Manage Case Flag Ticklers for each Flag.
- **Access Rights** - Manage View and Edit rights for all users for the selected Case Type.

### Tickler Maintenance

To manage Ticklers for Dispositions and Sentences, select the ellipsis  button in the Tickler column to select one or more Ticklers to be automatically created.

To manage Ticklers for Statuses and Flags, select the  button to add one or more Ticklers to be automatically created for the selected Status/Flag.

When maintaining Ticklers, **Offset Days** is used to specify the number of days after the Tickler is automatically created that it will be due.

If more Tickler types are needed, please refer to the instructions

under the [Event Type](#) Admin menu.

 **Note:** Changes in Tickler Maintenance to not take effect until users login with a new session.

### Autodoc Maintenance

To manage Autodocs for Dispositions and Sentences, select the  ellipsis button in the Autodoc column to select one or more Templates to be automatically created.

When adding each Autodoc, the ellipsis [...] button is used to browse and select the Template. Please see the [Templates](#) menu for more details about Template management.

Once selected, specify the default Generate, Print and Envelope options. Once triggered, these are the default options which will be selected. Users can modify these settings as needed each time a document is generated.

 **Note:** Changes in Autodoc Maintenance to not take effect until users login with a new session.

### See also

[Status](#)  
[Flags](#)  
[Events](#)  
[Lookups](#)

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Statute

The Case Admin Statute option allows admin users to add/edit, remove, or mark as inactive statutes for cases that they work with. This section allows for statutes to be added according to their type and attributes. The options that they are based on can be maintained in the admin options making the criteria for new Statutes fully expandible as the laws change.

In order to add a Statute that will be used in future cases you must have access to the Admin options.

Once in the Admin window:

1. You will select the Case icon on the icon bar
2. Select the Statute icon on the icon bar

Once you have done this you will see a page that looks like this

At this point you have the option to look up Statutes that already exist on the database or create a new Statute, Type or Attribute that can be bound to Statutes.

3. Select the New icon in the icon bar,
4. Enter the information for the new Statute and check the Attributes that you may want attached to the Statute,
5. Click Save.

Now you may want to save a new Statute but the attributes available do not correspond with the Statute. You can create the attributes from here as well, the instructions for this can be found [here](#).

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Statute Types

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Statute Attributes

The ability to add Attributes to a Statute is optional but can make finding specific Statutes easier.

In this section we will go over the process for this adding an Attribute to the Statute category.

1. Select the Admin icon on the icon bar from the Home Page,
2. Select the Case icon on the icon bar,
3. From here select the Attribute icon on the icon bar,

At this point you have the to view or edit attributes already created or create a new attribute.

4. Click the New icon from the icon bar and you will see a screen like this

5. Add the information for the attribute

6. Click the Save icon from the icon bar.

After you have saved the new attribute you can enter a new statute. Those instructions can be found [here](#).

See also

[Home](#) > [Admin Menu](#) > [Case Admin](#) > [Status](#)

## Status

This menu is used to configure which Autodocs and Ticklers are to be generated when cases are opened or closed in the system. Edit either Status by double-clicking or select Edit from the toolbar for the selected Status.

Select from the tabs shown across the bottom of the screen:

- Ticklers
- Autodoc

With the desired File Type selected, use the  button to insert each new Tickler/Autodoc to be generated for the selected Status.

### Tickler Maintenance

When maintaining Ticklers, **Offset Days** is used to specify the number of days after the Tickler is automatically created that it will be due.

If more Tickler types are needed, please refer to the instructions under the [Event Type](#) Admin menu.

 **Note:** Changes in Tickler Maintenance to not take effect

until users login with a new session.

#### Autodoc Maintenance

When adding each Autodoc, the ellipsis [...] button is used to browse and select the Template. Please see the [Templates](#) menu for more details about Template management.

Once selected, specify the default Generate, Print and Envelope options. Once triggered, these are the default options which will be selected. Users can modify these settings as needed each time a document is generated.

 **Note:** Changes in Autodoc Maintenance to not take effect until users login with a new session.

#### See also

[File Type](#)  
[Flags](#)  
[Events](#)  
[Lookups](#)

[Home](#) > [Admin Menu](#) > [Case Admin](#) > [Flags](#)

## Flags

Flags are used to designate a secondary status for cases for a variety of purposes. Once applied, Flagged cases can be found from [Case Search](#).

The Flag Admin menu is used to configure which Autodocs and Ticklers are to be generated for flagged cases. Edit each Flag by double-clicking or select Edit from the toolbar for the selected Status.

 **Note:** Flags shown with gray text are defined at the National level and cannot be deleted. However, custom Ticklers and/or Autodoc rules may still be configured for these Flags.

To create a new Flag, select  **New** from the main toolbar. 1 of 18 Flag colors can be selected, the same color can be used for multiple Flags if necessary.

Flag Priority, while not a required field, can be used to configure the order that Flags appear on the case. When Flags have been added to a case they're shown in the lower-left corner of the [Case File](#) tab.

Select from the tabs shown across the bottom of the screen:

- Ticklers
- Autodoc

With the desired File Type selected, use the  button to insert each new Tickler/Autodoc to be generated for the selected Status.



#### Tickler Maintenance

When maintaining Ticklers, **Offset Days** is used to specify the number of days after the Tickler is automatically created that it will be due.

If more Tickler types are needed, please refer to the instructions under the [Event Type](#) Admin menu.

 **Note:** Changes in Tickler Maintenance to not take effect until users login with a new session.

### Autodoc Maintenance

When adding each Autodoc, the ellipsis [...] button is used to browse and select the Template. Please see the [Templates](#) menu for more details about Template management.

Once selected, specify the default Generate, Print and Envelope options. Once triggered, these are the default options which will be selected. Users can modify these settings as needed each time a document is generated.

 **Note:** Changes in Autodoc Maintenance to not take effect until users login with a new session.

### See also

[File Type](#)  
[Status](#)  
[Events](#)  
[Lookups](#)

[Home](#) > [Admin Menu](#) > [Case Admin](#) > [Events](#)

## Events

The Event Type admin is used to manage events of the following types:

- Schedule
- Ticklers
- Time Tracking
- Expenses

 **Note:** Events shown with gray text are defined at the National level and cannot be deleted. However, custom Ticklers and/or Autodoc rules may still be configured for these Events.

To create a new Event Type, select  **New** from the toolbar.

### Schedule

These events will appear on the calendar view which can then be synchronized to Lotus Notes. Once created, users can manage them by accessing the  [Schedule](#) menu, or by selecting  **Schedule** from the toolbar of the  [Events](#) tab while editing a case.

### Ticklers

Once activated, these events will appear on the  [Home](#) screen as well as within the  [Ticklers](#) menu.

When creating or editing Ticklers, the **Reminder** field is used to specify the default number of days before a Tickler becomes active for the user(s) the Tickler was sent to. For example, if a Tickler is due on 1/14/2013 with a 7 day reminder then the Tickler will appear on 1/7/2013. When new Ticklers are created the Reminder will be set to the default value and the number of days can be modified as needed.

### Tickler Maintenance

When maintaining Ticklers, **Offset Days** is used to specify the number of days after the Tickler is automatically created that it will be due.

If more Tickler types are needed, please refer to the instructions under the [Event Type](#) Admin menu.

 **Note:** Changes in Tickler Maintenance to not take effect until users login with a new session.

### Autodoc Maintenance

When adding each Autodoc, the ellipsis [...] button is used to browse and select the Template. Please see the [Templates](#) menu for more details about Template management.

Once selected, specify the default Generate, Print and Envelope options. Once triggered, these are the default options which will be selected. Users can modify these settings as needed each time a document is generated.

 **Note:** Changes in Autodoc Maintenance to not take effect until users login with a new session.

#### See also

[File Type](#)  
[Status](#)  
[Flags](#)  
[Lookups](#)

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Results

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

#### See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Resources

Documentation pending.

In the interim, please refer to the [Pilot Training Webinar](#).

#### See also

[Home](#) > [Admin Menu](#) > [Case Admin](#) > [Lookups](#)

## Lookups

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

#### See also

[File Type](#)  
[Status](#)  
[Flags](#)  
[Events](#)

[Home](#) > [Admin Menu](#) > [People Admin](#)



## People Admin

People Admin mode contains the following sub-menus, select an option to learn more:



### See also

[Case Admin](#)

[Home > Admin Menu > People Admin > Role](#)



## Role

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

### See also

[Attorney](#)  
[Security](#)

[Home > Admin Menu > People Admin > Attorney](#)



## Attorney

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

### See also

[Role](#)  
[Security](#)

[Home > Admin Menu > People Admin > Security > Email Login](#)

## ADA/ Counsel

The ADA/ Counsel option under the People Admin mode allows admin users to add ADA/ Counsel and information about them to the application. This information can later be used in the creation of cases and anywhere else applicable to dD.

In order to perform this function the admin will select the Admin icon in the icon bar  
The screen will look like this

To add a new ADA/ Counsel to your database,

1. Select Admin from the icon bar at top
2. Select the People icon in the icon bar
3. Select the ADA/ Counsel icon in the icon bar

From here as the screen shot shows you can search or edit existing ADA/ Counsels as well as create new ADA/ Counsels.

Step 5 and on go over creating new ADA/ Counsel.

5. Click the New icon on the icon bar
6. Enter the information on the ADA/ Counsels
7. Click Save.

Now that the new ADA/ Counsel is saved you can view this information throughout dD where this field is accessible. If you should have a problem viewing this information after you have completed these steps then click [here](#) for further information on refreshing the new data.

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Judge

The Judge option under the People Admin mode allows admin users to add Judges and information about them to the application. This information can later be used in the creation of cases and anywhere else applicable to dD.

In order to perform this function the admin will select the Admin icon in the icon bar  
The screen will look like this

To add a new Judge to your database,

1. Select Admin from the icon bar at top
2. Select the People icon in the icon bar
3. Select the Judge icon in the icon bar

From here as the screen shot shows you can search or edit existing Judges as well as create new Judges.

Step 5 and on go over creating new Judge.

5. Click the New icon on the icon bar
6. Enter the information on the Judges
7. Click Save.

Now that the new Judge is saved you can view this information throughout dD where this field is accessible. If you should have a problem viewing this information after you have completed these steps then click [here](#) for further information on refreshing the new data.

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Court

This option allows the Admin user to add courts in their districts here. This information is populated throughout the dD application where applicable to your needs.  
in cases is where this is seen the most when a new case is added.

To add a new court to your database,

1. Select Admin from the icon bar at top
2. Select the People icon in the icon bar
3. Select the Court icon in the icon bar

From here as the screen shot shows you can search or edit existing Courts as well as create new Courts.

Step 5 and on go over creating new Court.

5. Click the New icon on the icon bar
6. Enter the information on the Courts
7. Click Save.

Now that the new Court is saved you can view this information throughout dD where this field is accessible. If you should have a problem viewing this information after you have completed these steps then click [here](#) for further information on refreshing the new data.

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Ethnicity

The Ethnicity option under the People Admin mode allows admin users to add Ethnicity to the dD application. This information can later be used in the creation of cases and anywhere else applicable to dD.

In order to perform this function the admin will select the Admin icon in the icon bar  
The screen will look like this

To add a new Ethnicity to your database,

1. Select Admin from the icon bar at top
2. Select the People icon in the icon bar
3. Select the Ethnicity icon in the icon bar

From here as the screen shot shows you can search or edit existing Ethnicity as well as create new Ethnicity.

Step 5 and on go over creating new Ethnicity.

5. Click the New icon on the icon bar,
6. Enter the information on the Ethnicity,
7. Click Save.

Now that the new Ethnicity is saved you can view this information throughout dD where this field is accessible. If you should have a problem viewing this information after you have completed these steps then click [here](#) for further information on refreshing the new data.

See also

[Home](#) > [Admin Menu](#) > [People Admin](#) > [Security](#) > [Email Login](#)

## Gender

This option allows the Administrator to list the genders that applicable in their Division, District or Circuit.

To do this

You will need to login with an admin account and select the Admin icon in the icon tray at top.

Once there click on the People mode next to the Case icon.

The option for Gender will appear and you will select that icon, the page will look like this

you can now edit,delete, or add new Genders that are tracked in your database  
From this point click the New icon in order to create a gender that you want to track.  
Once you have entered the Gender and the Description then you can click the Save icon in the icon bar in order to have the change be applied throughout the application.

See also

[Home > Admin Menu > People Admin > Security](#)



## Security

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

See also

[Role Attorney](#)

[Home > Admin Menu > People Admin > Security > Teams](#)



## Teams

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

See also

[Email Login](#)

[Home > Admin Menu > People Admin > Security > Email Login](#)



## Email Login

Documentation pending.

In the interim, please refer to the [Admin Pilot Training Webinar](#).

See also

[Teams](#)