

## defenderData User Manual - US - DSO

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## defenderData User Manual - US - DSO

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# defenderData Version 5 **Client User Manual**





Get Help



Login



Installation



Case Schedule Menu Management





Tasks Menu

Alerts Menu



**Reports Menu** 



Timesheet

Admin

Training

Home Screen

**Features Matrix** 

Cases Menu

**Ticklers Menu** 

**Templates** Menu

Legal Pad







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 Login Get Help Staff Training FAQ Cases Menu Case Management System Requirements Case File



defenderData User Manual - US - DSO

Home > Get Help



The FAQ provides answers to a question that has been asked before.

defenderData Support

Contact our customer support department by email at <a href="mailto:support@justiceworks.com">support@justiceworks.com</a> or by phone on our toll-free support line: (888) 696-9357.



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

Articles in this section



Home > Get Help > 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.



If you're unable to find what you're looking, try the  $\underline{FAQ}$ .

To contact the defenderData support department:

## Email:

support@justiceworks.com
Phone: (888) 696-9357

Organization:	<u> </u>		•
organization.			
	Ok		
			J Enlar
			J <sub>Enlar</sub>
rvalid Pessword			J <sub>Enlar</sub>
The user's password is in	valid. Please try system administra	retyping your pa	
The user's password is in	walid. Please try system administra	ator for help.	

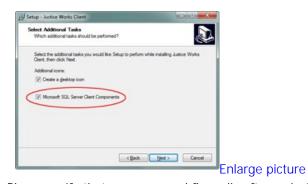
3. When an invalid password is entered at login the following dialog will be displayed. When selecting the "Forgot Password" checkbox an option to have your password sent to you via email is displayed. The email address entered must match the email address that's associated with your defenderData account.

## 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?

- 1. Please be sure that your computer was rebooted after the installation was completed.
- 2. 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.



3. 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 <u>defenderData Support</u> 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



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

#### dD Windows



#### 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



### 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



See also

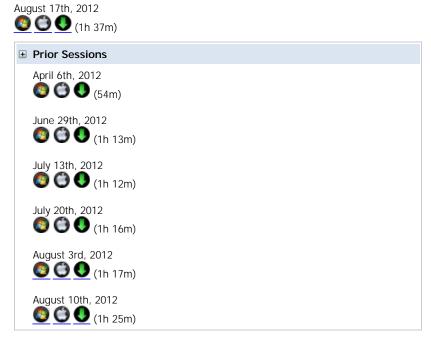
Welcome Get Help Admin Training Features Matrix Installation Login Home Screen Cases Menu Case Management Schedule Menu Timesheet Ticklers Menu Alerts Menu Legal Pad Templates Menu Reports Menu Quick Reference Guide Admin Menu

## Home > Admin Training

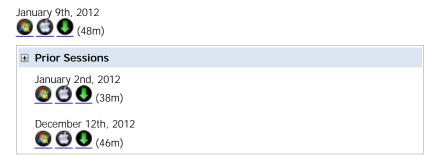


Windows Media Player must be installed to view recorded Webinars. Click select a link below to begin streaming the video.

## dD Windows



## dD Mobile

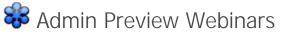


See also

Welcome Get Help Staff 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 Menu > People Admin > Security > Email Login



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 <u>View the recording</u> (1 hr 25m)

Document Management, Reports June 13th, 2012 View the recording (1 hr 5m)

Administrative Tasks June 20th, 2012 <u>View the recording</u> (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



## 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

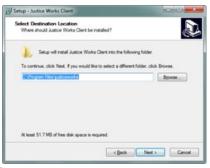
## Installation Instructions

The defenderData client software can be installed using the steps as detailed below. Please contact <u>defenderData Support</u> 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.



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



Q 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.



- 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.



Cale Content C

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 ->



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



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

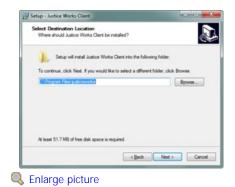
The defenderData client software can be installed using the steps as detailed below. Please contact defenderData Support to obtain your Organization ID and download link for the most current version of the software for your system.

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





- Seniarge picture
- 3. The default destination will is displayed. Change that path if needed and select **Next** to continue.



 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.

Ask Us 🍇
For further assistance, please contact the defenderData support department:
Email: 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
System Requirements
Required:
<ul> <li>Windows XP SP3</li> <li>512 MB RAM</li> <li>Internet connection</li> <li>Minimum Desktop Resolution of 1024x768</li> </ul>



Recommended:

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

Seniarge 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.



Seniarge picture

 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.



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

Enter your User Name and Password to login.

	Version 5.0 Blue
	User Name:
Justice	Password:
WORKS	OK Change Password

🔍 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:



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## Home > Login



## Starting the Application

To start the program, double-click the wdefenderData 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.

	I is invalid. Please try retyping your password our system administrator for help.
court Email Address:	E Forgot Password
Count Cittal Address.	Email Password

## 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.

Login Name:	krichey	
Full Name:	Keith Richey	
Current Password:		
New Password:		
Retype New Password:		
Password must have at lea lower case letters a OK	st 8 characters and con ind at least one number Cancel	

### 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 <u>defenderData Support</u>.

#### See also

Welcome Get Help Staff Training Admin Training Features Matrix Installation 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 > 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 submenus of the system, a **Define** 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.

### Toolbar

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

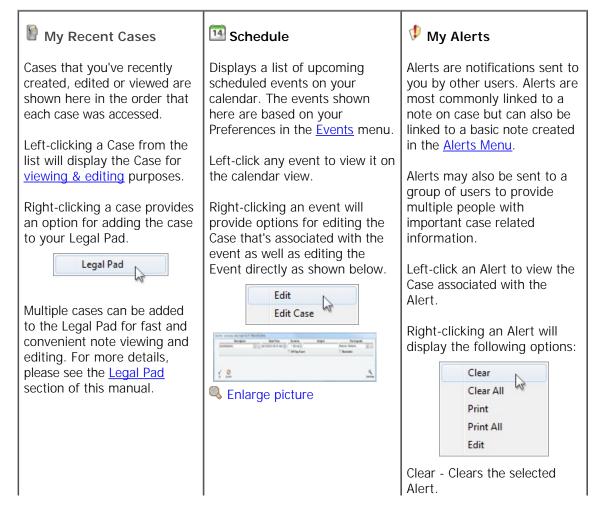


🔍 Enlarge picture

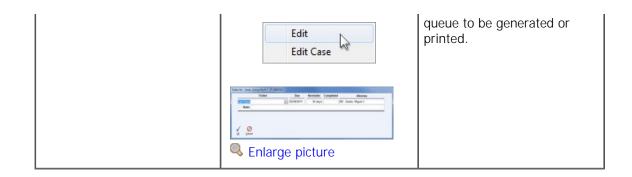


#### Dashboard

Details and instructions for each pane:



		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.
	Time Entries Displays all Time Entries that have been created today and any previously created Time Entries which are still incomplete. Left-click any Time Entry to launch the Timesheet. Right-clicking a Time Entry will provide options for editing the associated Case as shown below.	<ul> <li>My Tasks</li> <li>Displays all Tasks that have be en 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 Tasks Menu.</li> <li>Right-clicking a Task will display the following options:</li> <li>Clear All Print All Edit</li> <li>Clear - Clears the selected Task.</li> <li>Clear All - Clears all Tasks (notes associated with the Tasks will still appear on the Notes tab of the cases).</li> <li>Print - Prints the selected Task.</li> <li>Print All - Prints all Tasks.</li> <li>Edit - Opens the Task in an Edit window.</li> </ul>
🖗 My Recent Reports	ticklers	My Pending Documents
Displays a list of the most recent reports you've run. Selecting a report from the list will select it from the <u>Reports Menu</u> .	Displays all of your tickler reminders. See the Events section for more details. 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.	This section contains all of your Pending <u>Auto Docs</u> . 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



See also

Welcome Home Screen Login Get Help Staff Training FAQ Cases Menu Case Management System Requirements Case File

## Home > Cases Menu



To locate a case in the sytem, select the **Cases** button from the **Cases**. 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

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

## Home > Cases Menu > 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

file #:	Attorney:		Opened:	00/00/0000	00/00/0000
ise #:	Last Name:	۲	Event Type:		
tatus:	First Name:	۲	Event:	00/00/0000	00/00/0000
Flag:	DOB: 00/00/0000		Closed	00/00/0000	00/00/0000

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 "AI" in the First Name field would locate any case beginning with "AI", 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 #:					Attorney			Opened.	00/00/0000	00/00/0000	
Case #	%MC				Last Name:		۲	Event Type:			
Status:	Open	1			First Name		۵	Event	00/00/0000	00/00/0000	
Flag					DOB	00/00/0000		Closed	00/00/0000	00/00/0000	
File #		C	ase #	Atto	eney	Client Name	DOB	5	tatus		Case Flags
GC 07-00000	272	0019010	19MC	MS	Aaron	, Paul	00/00/0000	Open		Plea in Abeys	ance
GC 06-00008	628	0219110	67MC	MS	Aaron	Robert	00/00/0000	Open		Bench Warra	nt
GC 07-0000	1819	0319029	70MC	HC	Adam	is, Jesse Flynn	00/00/0000	Open			
GC 05-00005	5349	03CR08	540MC	00	Addis	on, Michael R.	00/00/0000	Open			
GC 07-00000	1258	03CR08	311MC	RB	Adkin	s, Lawrence	00/00/0000	Open		Bench Warra	nt
GC 05-00004	1695	03CR05	B17MC	RB	Agbe	o, Dennis	00/00/0000	Open			
GC 07-0000	1975	03CR15	303MC	OL	Aguia	r, William A.	00/00/0000	Open			
GC 07-00001	1728	03CR153	338MC	DD	Aguil	ar, Danyelle	00/00/0000	Open		Plea in Abeya	ance
GC 07-00001	1410	03CR14	371MC	WA	Aguila	ar, Karen Mack	00/00/0000	Open		Plea in Abeya	ance
GC 07-0000*	1058	03CR13	271MC	00	Aguil	ar, Todd Ray	00/00/0000	Open			

In the example shown here the search would retreive 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.

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

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2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

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

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, Aliki 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



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

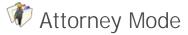
### Multi Edit Modes

Select an option below to learn more:



See also

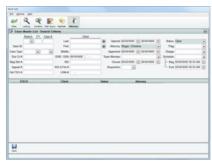
## Home > Cases Menu > Case Search > Multi Edit > Attorney Mode



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:

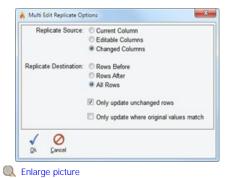


## Q Enlarge picture

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

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



- 5. The default options are to replicate the Changes Columns to All Rows which have not yet been changed. Select 🗸 Ok to apply.
- 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)":

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7. Select **Save** when finished.



Home > Cases Menu > Case Search > Auto Doc



The Auto Doc button in the <u>Case Search</u> 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 Cancer button. Documents marked for "Later" will not be generated or printed. Click the Cancer button to select "Later" for all documents. The Cancer button is used to exit the "Auto Document Generation" window.

STREET, ST	o Generate:				
Case	GC 03-00001714 - James Smith	IR Generate	II Print	10 Later	
Jocument	Latter	Envelope		-	
Case	F 05-00002510 - James Smith	C Generate	C Print	Later	
Jocument.	Latter	Envelope			
Case	STP04-00000002 - James Smith	SE Generate	2 Phint	E Later	
locument	Letter	Envelope:			
Case	F 07-00001961 - James Curtis Smith	C Generate	Print	Later	
<b>Document</b>	Latter	Envelope			
Case	F 07-00001385 - James Daniel Smith	III Generate	IZ Print	Later	
locument	Letter	Envelope:			
Case	F 05-00005715 - James Francis Smith	C Generate	2 Pint	Later	
locument	Latter	Envelope			
Case	F 04-00000567 - James Lish Smith	(R) Generate	III Print	E Later	
<b>Jocument</b>	Letter	Envelope:			
Case	F 03-00004902 - James Marshall Smith	If Generate	C Print	Later	
Jocument.	Letter	Envelope			
Case	F 06-00001725 - James O. Smith	III Generate	III Print	E Later	
locument	Latter	Envelope			
Case			IK Print		

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 is 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.

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C Enlarge picture

See also

Multi Edit

Home > Cases Menu > 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.

Name Search - Criterie Last Name: Jones		First Name: W	]			
Related Person		Role	File #	Case	Defendant	
ones, Wade	Defendant		ST 07-00000614	021400629MS	Jones, Wade	
ones, Wally	Witness -		F 07-00005815	031905108FS	Jones, Joshua	
ones, Wally	Witness -		F 03-00001976	991921006FS	Smith, Kristin	
ones, Walter	Defendant		STP06-00000015	001907075FS	Jones, Walter	
ones, Warren J.	Defendant		ST 04-00000638	001600016MS	Jones, Warren J.	
ones, Wendy	Defendant		F 03-00002933	991923618FS	Jones, Wendy	
ones, William	Defendant Alia	15	F 07-00003078	031908090FS	Caballero, Bill Macias	
ones, William Victor Orland	Defendant		F 07-00003871	031102244FS	Jones, William Victor Orland	
ones, Willie	Defendant Alia	15	F 07-00001559	031906274FS	Martinez, William F.	
ones, Willy	Defendant Alia	15	F 03-00000996	991915442FS	Rios, Willie Patrick	
ones, Willy	Defendant Alia	15	F 03-00001014	991915459FS	Jensen, Willie Bernardo	

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



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 contaning "Joshua" are found.

Vie Search Mode Options Help				
Case/Document Search Criteria:	<u> </u>			
Jocument Content: Joshua				
Type: Attorney:		► St	atus:	
Client Name	File #	Case #	Atty Case Stat	us
Jones, Joshua	"DA08-00000001	1	/F Open	
Jones, Joshua	F 07-00005815	031905108FS Z	M Post Sentencin	9
Memorandum in Support of Motion to Suppress Occurrent/Pictures		Created: 05/21/2010 05:12 pm Modified: 05/21/2010 05:13 pm		
C Motion to Dismiss Occurrents		Created: 11/02/2010 11:37 am Nodified: 01/08/2011 04:59 pm		
C Motion to Dismiss Documental Review		Created: 01/06/2011 09:21 pm Modified: 01/07/2011 08:33 am		
C Motion to Diamiss (Lack of Speedy Trial)		Created: 03/09/2010 04:12 pm Modified: 01/01/2011 01:22 pm		
OPD Sample: My sample locuments		Created: 07/22/2010 11:18 am Modified: 01/04/2011 04:48 pm		
Jones, Joshua	GC 07-00004274	041901444MC H	IC Open	
Smith, Allen	STP07-00000784	971019541FS F	G Closed	
PRISHEET102510A.pdf		Created: 12/01/2010 02:13 pm Modified:	Presenter, defenderData	
etrieved 8 rows.				defenderData Presen

C Enlarge picture

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

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-	XODXAA	8	
Nomal			
e e		······································	Conference
	F 07-00005815		
	STATE OF UTAH,	: SUPPORTING MEMORANDUM	
	Plaintiff, v.	8) 1)	
	Jones, Jonhua	: Case No. 031905108FS	
4	Defendant.	: Judge Burmester*	
		FACTS	
-			
1		ARGUMENT	
	delineating three di (1) an officer may - [sic] and cltizen i will; (2) if the suspicion"	parallels its federal counterpart, istinct levels of police intrusion: approach a citizen at anytime pose questions so long as the is not detained against his an officer may seize a person officer has an "articulable that the person has committed however, the "detention must be	

Q Enlarge picture

See also

Case Search Name Search Note Search

Home > Cases Menu > 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 Sentencing Informatio
    - Additional Client Information
  - Charge NotesEvent 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 contaning "withdrew" are found for Ramon Amador-Duffey's Closed cases.

Andreas Cara	inter man					<b>Leur</b>
0 9		8844	20			
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Case Type		Advenue Amartin Colleg, Ramon	(a) 04	- Cloud		
	Cheel States	1004	Attorney	Case 10	-	
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### Q Enlarge picture

To view each Note either double-click the row from the search results or select the row and then click the V 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

## F Case Management

A new case can be created by selecting  $\bigcirc$  New from the  $\blacksquare$  Find Case screen or from the Ease File tab of an existing case.

An existing case can be viewed by selecting it from the **My Recent Cases** pane on the My Recent Cases pane on the <u>Home Screen</u> or from the results of a search in the <u>Search Menu</u>.

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

## **Case Tabs**

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



Case File

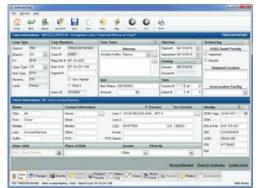




Charges



Linked Cases



## 🔍 Enlarge picture









Appeal





Documents

See	а	Isn

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

defenderData User Manual - US - DSO

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.

Very 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.



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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.

**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.

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Records to be manged	
Nere 00 Cares Anto-Ramed, Votor S206/197 2 Asses Votor N. 1 7	To make changes to the selected client records
Cases that will be under the marged record	
RAX     REV	select the S Back button. To cancel the merge Perform Me V Tip: Once a
EDD # Operand Minoray     Konsey     Konsey     Konsey     Konsey     Konsey	linked together a
Default Case two-benease Preses of marginel record. All unanisched Address & Phone details will be added to the Address & Phone on the marginel record.	Change Lug on the merged record. All Nasses will also be combined
0	Cover Participant

Records to be merged		DOB	Carro							
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Feat Wolar	Work .		Line 2					55N		
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				Male			•	Ref.		
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-				a margari seco				-		
0								0	Patan A	
feet.										

Back button. To

ancel 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 inked together as shown on the OLINKED Cases tab.

Enlarge picture

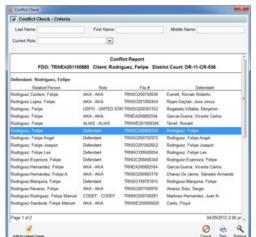
#### Conflict Check:

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  $\checkmark$  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**



Enlarge picture



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.



#### Q Enlarge picture



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.



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 been made





1.

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

**New Case** - This option is used to copy the <sup>2</sup>. selected details into a new case. Once

selected details into a new case. Once selected, various information may be included or excluded using the corresponding checkboxes as shown below.

Copy to: New Case	© Existing Case	
Copy Case	Copy Flags	Copy Related Court
Copy Defendant	Copy Events	Copy Related Non-Court
Copy Charges	E Copy Linked Cases	Copy Case Notes
Da Cancel		

**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.

Copy to: O New Case	Existing Case	
	Copy Flags	Copy Related Court
	Copy Events	Copy Related Non-Court
2 Copy Charges	Copy Linked Cases	🖾 Copy Case Notes
Dk Carcel		

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

the  $\checkmark$  Ok button to proceed or select  $\oslash$  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 Scase Search section of this manual.

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

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rieg			٠	008	00-00-0000		Gasset 30.00.0000	96-95-9696		
The R		Case #		unity .	Clest Bane	008	Status	1	Case Flag	

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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 W 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).



Navigate to the previous case found in the Search Menu.



Navigate to the next case found in the Search Menu.

Y 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.



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

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Charges Events Linked Cases **Related People** Status Log Workload Notes

## 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.



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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.



## Home > Case Management > 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.

#### See also

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

## Home > Case Management > 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.



#### See also

Case File Charges Linked Cases Related People

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Status Log
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Documents

## Home > Case Management > Events > Schedule

# 1 Schedule

To schedule new events on a case, select the  $\underbrace{\text{Events}}_{\text{Events}}$  tab of the case and then the  $\underbrace{\text{Is}}_{\text{Schedule}}$  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 screen.

The Events shown on this tab can be filtered using the  $\mbox{Event Type}$  and  $\mbox{Occurring}$  picklists as shown to the right.

Click  $\bigcirc$  New for each new Event to be 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 **Delete** button in the toolbar to delete an entry

See also

Ticklers Time Entry Expenses

## Home > Case Management > Events > Ticklers



The **Ticklers** screen is used to schedule a tickler which is shown with a Due Date and a Reminder on the **Die 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  $\bigcirc$  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 first icon. Click the **Delete** button in the toolbar to delete an entry

See also

Schedule Time Entry Expenses

Home > Case Management > Events > Time Entry

🕐 Time Entry

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To record your Time, select the S Events tab of the case and then the S 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  $\bigcirc$  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 *first* icon. Click the **Context Delete** button in the toolbar to delete an entry.

See also

Schedule Ticklers Expenses

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## Home > Case Management > Events > Expenses



To log your expenses, select the S <u>Events</u> tab of the case and then the P **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 **Delete** button in the toolbar to delete an entry.

#### See also

Schedule Ticklers Time Entry

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## Home > Case Management > 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.

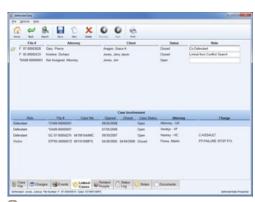
The selected link will be indicated with the  $\prod$  icon. The  $\bigcirc$  New button is used to create a new link and the **XDelete** button is used to delete the selected link.

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 has been found you can either double-click the case or highlight it and use the  $\checkmark$  Select button to choose it from the list of search results.

 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.

#### See also

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



🔍 Enlarge picture

Home > Case Management > Related People

🏶 Related People

The W 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, Witnesse, Co-Defendant, etc.

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

The  $\overset{\text{def}}{\swarrow}$  icon indicates which Related Person is currently selected. Selected people can be edited using the  $\overset{\text{def}}{\lor}$  Edit button or deleted using the  $\overset{\text{def}}{\lor}$  Delete button.

#### See also

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

Home > Case Management > Status Log



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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.
- 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.

#### 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

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#### 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



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:

- Starges
- Sevents
- W Related People
- Documents

The  $\ensuremath{\textit{Search Criteria}}$  section can be used to limit the Date Range of notes displayed in the list.

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

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

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

When selecting Users to be Alerted, the **Ø 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 **OPrevious** and **OPPREVIOUS** 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



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The  $\bigcirc$  **Documents** tab is used to store documents related to the case. Documents can be organized in a folder structure as seen to the right.

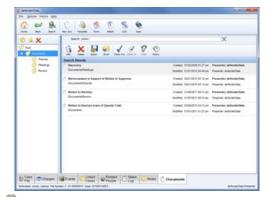
#### **Toolbar Functions**

The primary functions on the Documents tab are separated into two separate Toolbars. Please refer to the following sections for for further details:

- Primary Toolbar
- Secondary Toolbar

#### **Search Function**

The Search bar which is shown above the document list can be used to execute a full-text search of all documents within the selected folder and all sub-folders. Once a search term has been entered select the  $\P$  button or press the **<Enter**> key to execute the search.



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To apply the same search to a different folder simply select the folder from the folder tree on the left-hand side. Select the "Root" folder to apply the search to all folders on the case. To exit the Search select the button which will be shown to the right of the Search field.

#### **Batch Functions**

The following Batch options are available from the File menu:

- Batch Import Used to import a group of defenderData native documents (.JW format) from a specified folder. This feature is useful for copying a large number of documents between cases or from one Attorney to anothers Attorney's Template folder.
- Batch Export This feature can be use to export an entire folder of documents along with any sub-folders that also containing documents. The exported documents will be saved to your computer in the folder structure.
- Batch Attach If you have a large number of documents to attach this feature can be used to attach multiple documents at once from a single folder and any sub-folders.
- Batch Link A network folder and all documents contained within the folder can be Linked to the case using this feature. For more information about Linking documents to a case, please refer to the Link instructions on the <u>Primary Toolbar</u> page.
- Batch Print Select this option to print all documents within a selected folder.

#### Window Resizing

The width of the Folder List can be resized clicking and dragging the blue vertical bar that separates the Folder List from the Document list.

#### Renaming

Documents or Folders can be Renamed using one of the following methods:

- 1. Right-click the Document or Folder and then select Rename.
- 2. Highlight a Document and then select File -> Rename.
- Note: The "Root" folder cannot be modified, deleted or moved.
- 3. Hilight a Document and then press the <F2> key.

#### **Moving Documents**

Existing document can be moved to a different folder by dragging and dropping the document onto the new folder.

#### Attaching from Outlook

Emails can be dragged and dropped directly from Microsoft Outlook and they'll be saved to the case in the Outlook .msg format which includes any attachments to the original email.





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  $\bigcirc$  Documents tab includes many useful functions as described below.

## **Toolbar Button Descriptions**



#### $\langle \cdot \rangle$ Back

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



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.

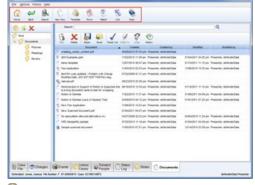
One the new document is saved you'll be prompted to provide a Document Name. Any documents created in this defenderData native format can be edited directly within the application by anyone with edit access to the client's case file. These documents can also be exported to common file formats such as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

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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.

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Enlarge picture

list of available templates.

## 3 Form

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



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.



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.



#### Q 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 includes any attachments to the email.



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 thefile 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.



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 sicon in the folder list. TIF documents can be viewed and Redacted directly within defenderData. For more details, please see the <u>Document Viewer</u> section of this manual.

See also

Secondary Toolbar Document Editor TIF Viewer

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Home > Case Management > Documents > Secondary Toolbar



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

 ${ig V}$  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**



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.

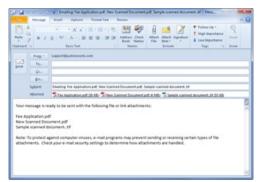


Documents can be exported in a variety of formats on in their native format.

When exporting native defenderData Documents (represented by the igvarpi 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.

### 5 Email

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





# Check Out

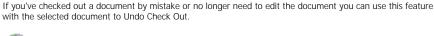
When this function is used a copy of the selected document(s) will be saved to your computer and other users will not be able to edit the documents while you have them checked out for editing. However, users will still be able to view the last version of the document that was saved on the case prior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



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.

Version Comment:	
	-
10	



Undo

History

V





## Enlarge picture

Export



Enlarge picture

defenderData User Manual - US - DSO

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 **Decument Export** button.



Primary Toolbar Document Editor TIF Viewer

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## Home > Case Management > Documents > Document Editor



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

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a l			
	Attorney for Defendant COUNTY DEFENDER		
	6413 Mashington Blwd. City, 87 10000		
	Telephone: 000-555-1212		
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	Ψ.	÷.,	
	(Client Full Name)	1	Case No. (case_shir)
2 - C	(CLIMPE Full Name)		ROMORABLE .

Q Enlarge picture

## **Toolbar Button Descriptions**



Return to the document list and abort any changes.



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>.



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

Insert Template Opens the Template window (See below for details).

J.E

View Pields Unsert Merge Fields Window (See below for details).

ABC 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  $\bigcirc$  **Select** button. To exit without selecting a template, click the  $\bigcirc$  **Close** button.

40

Enlarge picture

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

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 Target: Defendant

Charges - Multiple

Events - Multiple

Attorney
 Attorney
 Case
 Charge

Client

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 **Printer Merge Fields** button.

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

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

#### P Opposing Counse Related People W Related People - Multiple 📥 Merge Field Example of the formatting window used for the Client First Name merge field. nat Op Upper Case Lower Case Proper Case O 0 \$ S Enlarge picture Merge Field Fo Example of the Enlarge picture formatting window at On ٠ used for the Current dd'yyyy Date merge field. m-dd-yyyy Month dd, ywyy Month (Carcel dd ww ong Date th mm am/; dd/mm/yoov dd-mm-yyyy yyy-mm-de w/mm/dd Q Enlarge picture See also

Primary Toolbar Secondary Toolbar TIF Viewer

## Home > Case Management > Documents > TIF Viewer



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

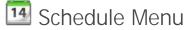
Double-clicking a TIF document will launch an integrated viewer which contains controls for redactions, navigation between pages, zoom, fit to width/height, rotation and print as shown to the right.

See also

Primary Toolbar Secondary Toolbar Document Editor



### Home > 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 **19 Schedule** button from the **10 Home Screen**.

#### Preferences

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

Group View At	torneys	
Attorney 1:	LB - Lovato, Beau	
Attorney 2:	DG - David, George	
Attorney 3:	RB - Reifenberger, Brian	
Attorney 4:	AS - Alires, Stacy	
Attorney 5:		
Default View	Group View	
10	85	

Enlarge picture

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:



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

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

Event		Date/Time	Duration	Attorney	
Apportment		<ul> <li>81/19/2011 12:30 PM</li> </ul>	0.50 Mail:	AS - Aires, Stacy	
Judge:	DA:		Staff	t	
Note:					
All Day Event				Reminder	
0					
A Cared					

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 SFind 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 **OPrevious** and **OPREVIOUS** 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



Select the **Month** button from the <u>Schedule Menu</u> to view events by month for the selected user.

Hold the mouse cursor oven 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



Select the **Agenda** button from the <u>Schedule Menu</u> to view events by work week for the selected user.

Hold the mouse cursor oven 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

Home > Schedule Menu > Week View



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(help)		Series anary

Q Enlarge picture

Select the Week button from the <u>Schedule Menu</u> to view events by week for the selected user.

Hold the mouse cursor oven 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





Home > Schedule Menu > Day View



Select the Day button from the Events Menu to view events by day for the selected user.

Hold the mouse cursor oven 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 **S** Previous and **D** 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

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Q Enlarge picture

## Home > Schedule Menu > Group View



Select the **Group** button from the **Schedule** Menu to view events for a group of users.

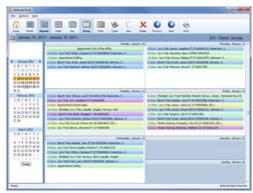
The Group View can be combined with each of the Calendar Views as shown in the samples below.

### Group - Day View

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(Intel	5"				
	6**				

Q Enlarge picture

## Group - Agenda View



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Group - Month View

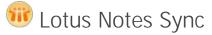


Q Enlarge picture

See also

Month View Agenda View Week View Day View Lotus Notes Sync

Home > Schedule Menu > Lotus Notes Sync



Documentation pending.

In the interim, please refer to the Pilot Training Webinar.

See also

Month View Agenda View Week View Day View Group View

## Home > 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 O <u>Time Entry</u> 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 efficent 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

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Time Entry	Date/Ter	e Roars	Time Extry User	
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Pour in Court Case Jones Johns Natur	PUTKOPT 10		Smith Frank	

Enlarge picture

## Home > 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.

<b>Tickler Attorne</b>	ryrs	
Attorney 1:	DG - David, George	
Attorney 2:	ZM - Zarate, Miguel J	
Attorney 3:	AJ - Alsonso, James	
Attorney 4:		
Attorney 5:		

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

Call Chert	Tickler		Dee Anylor Dee		e) Completed Attorne (A2 - Nourea, James		Comment
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can creat			in march 1	11 0494	To The other	1 11-10050-5	James, Joshua
Reise Case		1	8016-0818	12 days	JAS-Alms, Stacy		
Adapt to Case							

Enlarge picture

#### See also

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

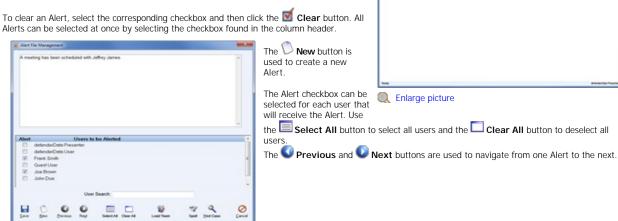
## Home > Alerts Menu



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  $\Psi$ Alerts button from the Determined 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 <u>Notes</u> 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 **V** Edit icon which is displayed next to each note.

Alerts can be selected at once by selecting the checkbox found in the column header.



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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 Admin Menu

## Home > 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  $\bigotimes$  Tasks button from the  $\bigotimes$  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 **C** Edit icon which is displayed next to each note.

To clear a Task, select the corresponding checkbox and then click the  $\mathbf{M}$  **Clear** button. All Tasks can be selected at once by selecting the checkbox found in the column header. The  $\mathbf{N}$ 

This first Management     Prese contact the client to confirm this apportment.	New button is used to create a new Task as shown to the left.
Assignated (Smith, Frank	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.
La C C C C C C C C C C C C C C C C C C C	The <b>O Previous</b> and <b>O Next</b> buttons are used to navigate from one Task to the next.

6

0 0 0

**Enlarge** picture

### See also

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

## Home > 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 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  $\bigcirc$  New button. To delete the selected note, click the  $\checkmark$  Delete button. Once all changes are complete, click the  $\blacksquare$  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.

**V** 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.

- defenderCate Legal R	<b>W</b>	NOTICE MARKED
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	Defendant: Jemes, Daolel F. File #: S1 05.0000128F Charge: S-VEH-Dut	Oate Operant: 64/17/2909
Acord, M GC 07.00004776 Adams, B	Please propers a redice to suppress	2005-86-92 10:54 pm - defender/Data Presenter
GC 05-88888279 Cervin, L GC 07-88881851	Client requested a meeting today with Mr. Alsonse	3000 64 17 63 31 pm - defenderData Presenter
Annes, D ST 05-00001097	Please mine the co-defendant's case.	3005.04.17 K5.51 pm . defenderCala Presenter
Smytha, F F 06-38000002		

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 Tasks Menu Templates Menu Reports Menu Quick Reference Guide Admin Menu

## Home > 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  $\bigcirc$  New Doc button. The selected template may also be deleted using the  $\checkmark$  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.

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

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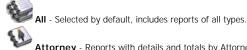
## Home > Reports Menu



The dD Client allows you to print a variety of reports. To print reports, select the 🥯 **Reports** button from the **Mome** Screen as shown to the right.

#### Menu Button Descriptions

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



Attorney - Reports with details and totals by Attorney. E

Charge - Reports with details and totals by Charge.

Case - Reports which include individual case information.

Summary - Statistical Reports.

Time - Time keeping Reports.

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Altumey Oxfendant Rapot	Attorney Pending Cane Load option by Defendant	
Atturney Statistic Report	Statistical Report of Cases by Attorney: File Type/Deposition	
Aturney Trai Report	Total activity by attorney	
Alturney Year End Report.	Attorney Year End Pending Case Load	
Case Flag Report	Case Report by Flag	
Cane Load Report	Attorney Cece Load Statistics Report	
Case Load Report with Flags	Attorney Cene Load Statistics Report with Flags	
Charge Report	Pending Case Laad by Charge	
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Oosed Case Report	Ocourt Gases by Attorney	
Daily Log of New Cases	Raturn a daily log of new cases opened within a date range	
Statistical Report	Statistical Report of Cases by File Type/Disposition	
Summary Chart	Summary Chart d'Rew Cases by Charge	
Summary Ethnicity Report	Summary Report of Cases by Ethnicity	
Summary Report	Burnnary Report of New Cases by Charge	
Summary Statute Horibute Chart	Survivary Chart of Cases by Statute Attribute	
Summary Stature Rebitute Report	Summary Report of Cases by Statute Attribute	
hat		Advantus house

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.

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Welcome Get Help Staff Training 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 Quick Reference Guide Admin Menu

## 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 Lookun

#### F12 Combine Lookup Tab Next Field

# 🕐 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	l:
Т	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
Н	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
С	Date Selection Calendar

#### See also

Welcome Get Help Staff Training Features Matrix Installation Login Home Screen Cases Menu Case Management Schedule Menu Timesheet Ticklers Menu Alerts Menu Tasks Menu

## Documents

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

## Case Edit

Legal Pad Templates Menu Reports Menu Admin Menu

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

# **Dispositions Appendix**

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±	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 (secound 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

±	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 COUNSEL RELIEVED - Defendant Waived Counsel 603 COUNSEL RELIEVED - Conflict of Interest 604 OTHER - Miscellaneous/Services Completed/Consultation 801 OTHER - Defendant Deceased 808 ■ ANCPRO Ancillary Proceedings COUNSEL RELIEVED - Substitution Appointed 601 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 COUNSEL RELIEVED - Conflict of Interest 604 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 815 OTHER - Bond Continued/Revoked (Specify in Notes) OTHER - Charges Not Filed/Action Not Pursued 827 837 OTHER - Restitution Order Amended 🛨 APM Magistrate Decision APPEAL - District Court: Affirmed 301 302 APPEAL - District Court: Reversed/Vacated 303 APPEAL - District Court: Remanded APPEAL - District Court: Dismissed 304 305 APPEAL - District Court: Aff/Rev (in part) COUNSEL RELIEVED - Substitution Appointed 601 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest 701 MISCELLANEOUS - Failure to Appear/Abscond 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 BP Bail / Presentment COUNSEL RELIEVED - Substitution Appointed 601 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation 801 808 OTHER - Defendant Deceased 815 OTHER - Bond Continued/Revoked (Specify in Notes) 🛨 CA Other matters 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

APPEAL - Court of Appeals by Client: Aff/Rev (in part) 315 316 APPEAL - Court of Appeals: OTHER 322 Anders Brief (Specify in Notes the Ruling) 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 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 Circuit Argument Only 🛨 CAO 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel 604 COUNSEL RELIEVED - Conflict of Interest 801 OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased 808 831 OTHER - Circuit Argument Only Completed 🛨 CCA Co-Counsel Appointment **COUNSEL RELIEVED - Substitution Appointed** 601 COUNSEL RELIEVED - Substitution Retained 602 COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 CCC Criminal or Civil Contempt 601 **COUNSEL RELIEVED - Substitution Appointed** COUNSEL RELIEVED - Substitution Retained 602 COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation 801 OTHER - Criminal/Civil Contempt 804 808 OTHER - Defendant Deceased 🛨 CCO Conflict Counsel 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 COUNSEL RELIEVED - Defendant Waived Counsel 603 COUNSEL RELIEVED - Conflict of Interest 604 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 CD Court Directed Prisoner Representation 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 COUNSEL RELIEVED - Conflict of Interest 604 OTHER - Miscellaneous/Services Completed/Consultation 801 808 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
±	СК	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
		Creak assiss retractive amondment (accord round)
±	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
Ŧ	CONS	UL Consultations
Ŧ		
Ŧ	212	Rule 5 - Transferred - District Court
Ŧ	212 601	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed
Ŧ	212 601 602	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained
Ŧ	212 601 602 603	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel
ŧ	212 601 602 603 604	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest
Ŧ	212 601 602 603 604 801	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation
Ŧ	212 601 602 603 604 801 808	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased
	212 601 602 603 604 801 808 827	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation
	212 601 602 603 604 801 808 827 CR	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal
	212 601 602 603 604 801 808 827 CR 101	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court
	212 601 602 603 604 801 808 827 CR 101 102	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court
	212 601 602 603 604 801 808 827 CR 101 102 103	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court
	212 601 602 603 604 801 808 827 CR 101 102 103 104	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Court/Bench Trial - Magistrate Court
	212 601 602 603 604 801 808 827 CR 101 102 103 104 105	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Jury Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court
	212 601 602 603 604 808 827 CR 101 102 103 104 105 106	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Court/Bench Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court
	212 601 602 603 604 808 827 CR 101 102 103 104 105 106 108	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Jury Trial - Magistrate Court Not Guilty After Court/Bench Trial - Magistrate Court Not Guilty After Court/Bench Trial - Magistrate Court Not Guilty After Court/Bench Trial - Magistrate Court
	212 601 602 603 604 808 827 CR 101 102 103 104 105 106 108 109	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Court/Bench Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court OTHER (Specify in the Notes)
	212 601 602 603 604 801 808 827 CR 101 102 103 104 105 106 108 109 201	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Jury Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court DISMISSAL OTHER (Specify in the Notes) Guilty Plea - District Court
	212 601 602 603 604 808 827 CR 101 102 103 104 105 106 108 109	Rule 5 - Transferred - District Court COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Charges Not Filed/Action Not Pursued Criminal Guilty Plea - Magistrate Court Nolo Contendere Plea - Magistrate Court Guilty After Jury Trial - Magistrate Court Guilty After Court/Bench Trial - Magistrate Court Not Guilty After Jury Trial - Magistrate Court OTHER (Specify in the Notes)

204 Guilty After Court/Bench Trial - District Court 205 Not Guilty After Jury Trial - District Court Not Guilty After Court/Bench Trial - District Court 206 DISMISSAL of Complaint - District Court 208 DISMISSAL of Indictment - District Court 209 210 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) COUNSEL RELIEVED - Substitution Appointed 601 COUNSEL RELIEVED - Substitution Retained 602 COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest 701 MISCELLANEOUS - Failure to Appear/Abscond MISCELLANEOUS - Committed/Incompetent 702 801 OTHER - Miscellaneous/Services Completed/Consultation 803 OTHER - Juvenile Delinquent 808 OTHER - Defendant Deceased 826 OTHER - Forfeit of Collateral HC Challenge to state sentence

#### 🛨 D1

	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
±	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
- APPEAL Court of Appeals by US: Reversed/Vacated 307

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

#### 

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

COUNSEL RELIEVED - Conflict of Interest 604 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 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 APPEAL - Court of Appeals by US: Remanded 308 APPEAL - Court of Appeals by US: Dismissed 309 310 APPEAL - Court of Appeals by US: Aff/Rev (in part) 311 APPEAL - Court of Appeals by Client: Affirmed APPEAL - Court of Appeals by Client: Reversed 312 313 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) APPEAL - Court of Appeals: OTHER 316 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 D6 Redesig from D2 : Life Verdict After Trial Guilty After Jury Trial - District Court 203 311 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 COUNSEL RELIEVED - Substitution Appointed 601 COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest 604 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 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 COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel 604 COUNSEL RELIEVED - Conflict of Interest 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 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
±	DCP	Drug Court Participant
	848	OTHER – Drug Court Graduate
	849	OTHER – Drug Court Termination Unsuccessful
	850	OTHER – Drug Court Termination Voluntary
±	DPAC	Capital Case Amicus Curiae
	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
±	DPCC	Capital Case Co-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
±	DPCD	Capital Prisoner Consultation
	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
±	DPCO	Capital Case 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
±	DPSB	Capital Case Stand-by or Advisory Counsel
Ŧ	DPSB 601	Capital Case Stand-by or Advisory Counsel COUNSEL RELIEVED - Substitution Appointed
Ŧ		
Ŧ	601	COUNSEL RELIEVED - Substitution Appointed

	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
+	EXTRA	D 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
Ŧ	FAO	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
±	GCP	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
±	HA	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
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	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
		COUNSEL RELIEVED - Substitution Appointed
	601	coonset Reference - Substitution Appointed
	601 602	COUNSEL RELIEVED - Substitution Retained

6	604	COUNSEL RELIEVED - Conflict of Interest
8	801	OTHER - Miscellaneous/Services Completed/Consultation
8	808	OTHER - Defendant Deceased
± ł	HC	Habeas Corpus (Non-Capital State)
Ę	501	HABEAS CORPUS - Granted
Ę	502	HABEAS CORPUS - Denied
Ę	503	HABEAS CORPUS - Dismissed
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
6	603	COUNSEL RELIEVED - Defendant Waived Counsel
e	604	COUNSEL RELIEVED - Conflict of Interest
8	801	OTHER - Miscellaneous/Services Completed/Consultation
8	808	OTHER - Defendant Deceased
±	JU	Juror Representation
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
6	603	COUNSEL RELIEVED - Defendant Waived Counsel
6	604	COUNSEL RELIEVED - Conflict of Interest
8	801	OTHER - Miscellaneous/Services Completed/Consultation
8	808	OTHER - Defendant Deceased
±١	LU	Line-Up
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
6	603	COUNSEL RELIEVED - Defendant Waived Counsel
e	604	COUNSEL RELIEVED - Conflict of Interest
8	801	OTHER - Miscellaneous/Services Completed/Consultation
8	808	OTHER - Defendant Deceased
8	827	OTHER - Charges Not Filed/Action Not Pursued
± N	M4243	A Mental Disease 4243(a)
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
e	603	COUNSEL RELIEVED - Defendant Waived Counsel
6	604	COUNSEL RELIEVED - Conflict of Interest
	702	MISCELLANEOUS - Committed/Incompetent
8	801	OTHER - Miscellaneous/Services Completed/Consultation
8	808	OTHER - Defendant Deceased
± N	M4243	C Mental Disease 4243(c)
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
6	603	COUNSEL RELIEVED - Defendant Waived Counsel
6	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
± N	M4243	E Mental Disease 4243(e)
6	601	COUNSEL RELIEVED - Substitution Appointed
6	602	COUNSEL RELIEVED - Substitution Retained
6	603	COUNSEL RELIEVED - Defendant Waived Counsel

COUNSEL RELIEVED - Conflict of Interest 604 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased ■ M4243F Mental Disease 4243(f) 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest MISCELLANEOUS - Committed/Incompetent 702 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased M4243G Mental Disease 4243(g) COUNSEL RELIEVED - Substitution Appointed 601 602 COUNSEL RELIEVED - Substitution Retained 603 COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest 604 702 MISCELLANEOUS - Committed/Incompetent 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased COUNSEL RELIEVED - Substitution Appointed 601 602 COUNSEL RELIEVED - Substitution Retained 603 COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest 604 702 MISCELLANEOUS - Committed/Incompetent OTHER - Miscellaneous/Services Completed/Consultation 801 808 OTHER - Defendant Deceased M4246A Mental Disease 4246(a) 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel 604 COUNSEL RELIEVED - Conflict of Interest 702 MISCELLANEOUS - Committed/Incompetent 801 OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased 808 ■ M4246E Mental Disease 4246(e) COUNSEL RELIEVED - Substitution Appointed 601 COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel COUNSEL RELIEVED - Conflict of Interest 604 MISCELLANEOUS - Committed/Incompetent 702 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased + M4246F Mental Disease 4246(f) 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 OTHER - Miscellaneous/Services Completed/Consultation 801 808 OTHER - Defendant Deceased 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest MISCELLANEOUS - Committed/Incompetent 702 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased ■ M4248E Mental Disease 4248(e) 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 603 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 ■ M4248F Mental Disease 4248(f) 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 604 COUNSEL RELIEVED - Conflict of Interest 702 MISCELLANEOUS - Committed/Incompetent 801 OTHER - Miscellaneous/Services Completed/Consultation 808 OTHER - Defendant Deceased 🛨 MA Motion Attacking Sentence - HC (Non-Capital Fed) 501 HABEAS CORPUS - Granted 502 HABEAS CORPUS - Denied 503 HABEAS CORPUS - Dismissed 504 SENTENCE MOTION - Granted SENTENCE MOTION - Denied 505 506 SENTENCE MOTION - Dismissed 601 COUNSEL RELIEVED - Substitution Appointed 602 COUNSEL RELIEVED - Substitution Retained COUNSEL RELIEVED - Defendant Waived Counsel 603 COUNSEL RELIEVED - Conflict of Interest 604 OTHER - Miscellaneous/Services Completed/Consultation 801 808 OTHER - Defendant Deceased H MC Motion to Correct or Reduce (Rule 35) 504 SENTENCE MOTION - Granted SENTENCE MOTION - Denied 505 506 SENTENCE MOTION - Dismissed 601 COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained 602 603 COUNSEL RELIEVED - Defendant Waived Counsel

	604	COUNSEL RELIEVED - Conflict of Interest
	801	OTHER - Miscellaneous/Services Completed/Consultation
	808	OTHER - Defendant Deceased
±	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
-		
±	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
	MOD	Modification of Probation
±	MOP	
	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
±	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
±	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
1		

801	OTHER - Miscellaneous/Services Completed/Consultation

- 807 OTHER Prisoner Transfer

	808	OTHER - Defendant Deceased
+	ОТ	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
-	PA	Parole Revocation
T		
	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
+	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
+	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

	801 808	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased
±	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
_		
±		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
Ŧ	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
÷	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
±	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

🛨 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	
808	OTHER - Prisoner Transfer
000	OTHER - Defendant Deceased
🛨 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
	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
🛨 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
🛨 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
312	APPEAL - Court of Appeals by Client: Reversed APPEAL - Court of Appeals by Client: Remanded
313	APPEAL - Court of Appeals by Client: Dismissed
314	APPEAL - Court of Appeals by Client: Aff/Rev (in part)
315	
316	APPEAL - Court of Appeals: OTHER
	Anders Brief ( Specify in Notes the Ruling)
601 602	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
Ŧ	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
Ŧ	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
±	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
+	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
	. 00	
	801	OTHER - Miscellaneous/Services Completed/Consultation
	801	OTHER - Miscellaneous/Services Completed/Consultation
+	801 808	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased
±	801 808 813	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing
±	801 808 813 SR	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release
±	801 808 813 SR 212	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release Rule 5 - Transferred - District Court
Ŧ	801 808 813 SR 212 213	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release Rule 5 - Transferred - District Court Rule 20 - Transferred - District Court
±	801 808 813 SR 212 213 407	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release Rule 5 - Transferred - District Court Rule 20 - Transferred - District Court PAROLE - Referred to Institution
±	801 808 813 SR 212 213 407 410	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release Rule 5 - Transferred - District Court Rule 20 - Transferred - District Court PAROLE - Referred to Institution SUPERVISE RELEASE - Revoked
	801 808 813 SR 212 213 407 410 411	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased OTHER - Sentencing/Re-Sentencing Supervised Release Rule 5 - Transferred - District Court Rule 20 - Transferred - District Court PAROLE - Referred to Institution SUPERVISE RELEASE - Revoked SUPERVISE RELEASE - Terminated

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
🛨 SS	State Statutes
103	Guilty After Jury Trial - Magistrate Court
105	Not Guilty After Court/Bench Trial - Magistrate Court
601	
602	COUNSEL RELIEVED - Substitution Appointed COUNSEL RELIEVED - Substitution Retained
603	COUNSEL RELIEVED - Defendant Waived Counsel
604	
	COUNSEL RELIEVED - Conflict of Interest
801 808	OTHER - Miscellaneous/Services Completed/Consultation OTHER - Defendant Deceased
▪ 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
+ 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 Count Termination Unsuccessful
856	OTHER - Veterans Court Termination Voluntary

102 Nolo Contendere Plea - Magistrate Court

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

OTHER - Witness Representation Completed

See also

839

### Home > Admin Menu



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



## Home > Admin Menu > 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



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 **W** 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  $\clubsuit$  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 <u>Event Type</u> 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 <u>Templates</u> 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:

You will select the Case icon on the icon bar
 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



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 doubleclicking 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 <u>Event Type</u> 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 <u>Templates</u> 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 are used to designate a secondary status for cases for a variety of purposes. Once applied, Flagged cases can be 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 <u>Case File</u> 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 <u>Event Type</u> Admin menu.

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

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#### Autodoc Maintenance

When adding each Autodoc, the ellipsis [...] button is used to browse and select the Template. Please see the <u>Templates</u> 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



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  $\bigcirc$  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 schedule from the too

#### Ticklers

Once activated, these events will appear on the M Home screen as well as within the M 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 <u>Event Type</u> 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 <u>Templates</u> 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



Documentation pending.

In the interim, please refer to the Pilot Training Webinar.

See also

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



## See also

Case Admin

Home > Admin Menu > People Admin > Role



#### Documentation pending.

In the interim, please refer to the Admin Pilot Training Webinar.

See also

Attorney Security

## Home > Admin Menu > People Admin > 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 <u>here</u> 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



Documentation pending.

In the interim, please refer to the Admin Pilot Training Webinar.

See also

Role Attorney

## Home > Admin Menu > People Admin > Security > 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



Documentation pending.

In the interim, please refer to the Admin Pilot Training Webinar.

See also

Teams