ACMS

Appellate Case Management System

User's Manual

Table of Contents

Detailed Table of Contents

MOVING FROM FIELD TO FIELD

Use the **tab** key to move from field to field within a screen. (Enter will not work.)

CLICKING WITH THE MOUSE

Single-Click unless otherwise instructed by ACMS. Under most circumstance, double-clicking will not work to select items. Data Grids are the exception to this (like the lists of Zip Codes, Cases within County). All data grids state that double-clicking is required, with cursor positioned in leftmost column.

ATTORNEY

Ability to search by full name, last name, or registration number when joining an attorney to a party.

CLIPBOARDS

Usable on Case Caption, Attorney Address, and Party Address.

CONSOLIDATIONS

Screen (in Tools) shows all cases consolidated into a number and provides single-click link to any listed.

COUNTY

When entering a county, enter up to 3 letters of the county name if county number is unknown.

CONFLICTS

Conflict information may be established by case, by attorney, by trial court judge, or by party name. Conflicts pertinent to a specific case can be viewed while in Assignments, Events, or Case screens.

ENVIRONMENTAL

Click this command button in Tools to enter data unique to the district court.

INQUIRIES

Search by case number and trial court number, party name or attorney name from one screen.

Definitions

CODES FILES

Many of the fields used draw their information from a specific list (for example, the filing abbreviation). In this document, those lists are referred to as "Codes Files". The code file contains the abbreviation used on other forms as well as the description of that abbreviation. The Codes Files can be found on the Tools Form.

COMMAND BUTTONS

Rectangular Boxes with labels that when clicked open another form or open a list view. If a button's label is gray, it is inactive.

CONTROL

Refers to any item on a form allowing user interaction – a command button, a field, a list view, a data grid, etc.

DATA GRID

Often when a search for records is done, those records are displayed in a box in a list format. Sometimes, the list is so lengthy that the box is a grid, like a spreadsheet, and is called is a data grid. Double-clicking will select records in a data grid. See below:

DATE CALCULATOR

Many of the date fields have an icon next to them that when clicked displays the date calculator. (see below) It will calculate the desired date based on the criteria the user enters. For instance, one can enter a start date, indicate that the new date should be 20 days from that start date, and then select the option to exclude weekends. Then when "Calculate" is clicked, the program will calculate the desired date. Click "use this date" to put the computed value into the field. Simply pressing compute will use today's date.

DIALOG WINDOW

A pop-up window that requires input of some kind from the user before any action can be performed by the program.

FIELD
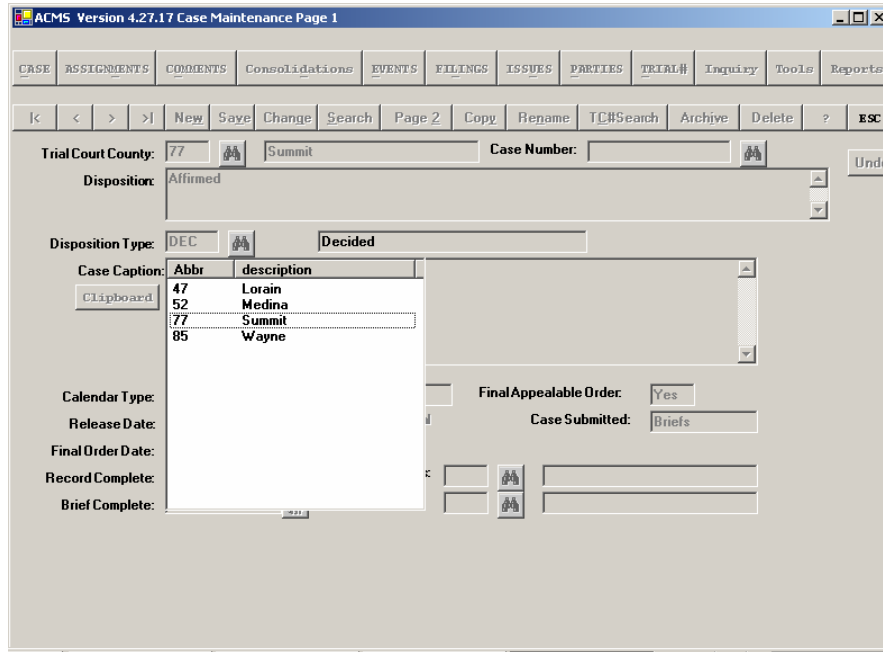
Any individual piece of information on a form (for example, "first name" is one field; "last name" is another).

FORM

The screen at which you are looking at any given time. The name of the current form is found at the top left.

LIST VIEW

Often when a search for records is done, those records are displayed in a box in a list format. This is referred to as a list view. Single clicking will select records in a list view. See below:

RECORD

One set of information identified uniquely. For example, one case and its related information is a record, one filing and its related information is a record, etc.

SEARCH BINOCULARS

A command button which has a picture of binoculars for its label. This label is always associated with a specific field. Clicking the button will display a list of information. The associated field will only accept information from that list.

BUTTONS IN ALL CAPS – WHAT DO THEY MEAN?

If there is information in another form that is related to the current record, the label on the command button that opens that form will be in all capital letters. The label will refresh when the Save button is pressed.

ENTERING INFORMATION IN FIELDS WHICH PULL FROM A LIST

You can either:
1. Type the information. If it is not correct the program will issue a warning.
2. Click on the binoculars and select from the list
3. Click F5 and select from the list.

ESCAPING

There are three ways to escape a form or an action being performed on that form:
1. X button in the top right hand corner of the form
2. Clicking on the ESC command button on the form
3. Pressing the ESC key on the keyboard

When one escapes a portion of the application and information has not been saved, the application will issue a warning. To save data, click no and then click save.

MOVING FROM FIELD TO FIELD

Use the tab key to move from field to field on the screen. The enter key will not work to move from field to field.

MOVING FROM FORM TO FORM

Command Buttons

The main screen, as well as many of the other forms, contains a row of command buttons at the top. Use the mouse to click on the appropriate button. If a button's label is gray, it is inactive.

Hot Keys

Most of the command buttons have "hot keys" enabled, for example, the "Case" command button in the upper left hand corner of the Main form has "C" as its hot key. Pressing "C" while your cursor is not in a text field will take you to the Case screen.

The hot keys for the main command buttons are as follows:
C=Case
M=Assignments
O=Comments
D=Consolidations
E=Events
L=Filings
U=Issues
P=Parties
T=Trials

MOVING FROM RECORD TO RECORD

Navigational Buttons

Many forms use navigational buttons to move from one record to another:
|< go to first record,
< go to previous record,
> go to next record, and
>| go to last record)

If you are on the first or last record and try to go beyond that record, the system will warn you or flash a message box saying "ACMS".

The set of records the navigational buttons scroll through changes according to which form is being used. Here are a few examples:

Form	Record Set
Case Maintenance Form (when entered from the main menu)	All Cases in the database for a county.
Filings Maintenance Form	All files pertaining to the current case number
Party Maintenance Form	All parties pertaining to the current case number
Attorney Address Form	All addresses pertaining to the current Attorney

Selecting a Record from a List

1. Many forms contain a **"Search"** command button or search binoculars.
2. When clicked, a **list view** or **data grid** will appear which can be sorted by any of its columns.
3. **Select** the desired record by clicking on it.
Note: Unless otherwise indicated by the tool tip, a single mouse-click should be used

Select a Record By specifying a County and Case Number (CHANGE Button)

1. From most forms, click on **Change.**
2. **Specify the county** by entering the county number or the first few letters of the county name or by pressing F5 or clicking on the binoculars to select the county from a list view.
3. If the first letters entered could indicate more than one county, the application will select the first county the letters match and warn the user:
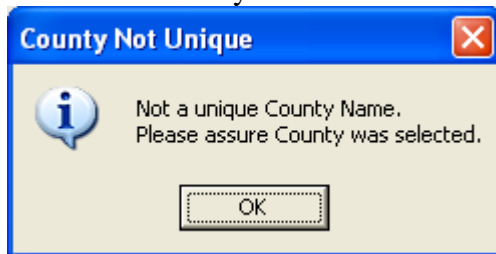
4. **Verify** that the county is correct; enter **Tab** to move to **case number** field.
5. Select the **case number** by entering it or by pressing F5 or clicking on the binoculars to select the case number from a data grid.
6. If you type the case number rather then selecting it from the data grid, you must then press **Tab.**
7. If it is a valid case number, the new record will become active.

SORTING LISTS

Lists may be sorted by columns into ascending or descending order. If a column is sorted in ascending order, its first letter will capitalized. If it is in descending order, the first letter will be lower case. **Click on the column header** to sort by that column and to switch the sort order.

Note: the width of the columns of the list view can be adjusted by positioning the mouse on the dividing line between columns, holding down the left hand mouse button and sliding either left or right.

TOOL TIPS

Every control has a "tool tip." **Placing the mouse cursor over a control** for a moment will display the associated tool tip (tool tips will only display for a few seconds).
Note: a tool tip will only appear if the control is enabled for use.

Saving and Undoing Changes

SAVING

The system <u>automatically</u> saves all data changes to a short-term memory bank. Therefore, even if one does not save data changes, they will still appear, as long as the application is not closed. ONCE THE APPLICATION IS CLOSED, ANY INFORMATION NOT SAVED TO THE DATABASE WILL BE LOST. For this reason, it is recommended that the user save after every entry or modification.

Pressing the "save" command button saves all data changes on ALL screens to the database. Changes saved to the database cannot be undone.

When one escapes (or exits) a portion of the application and information has been changed but not yet saved, the application will warn the user of this fact. For example:
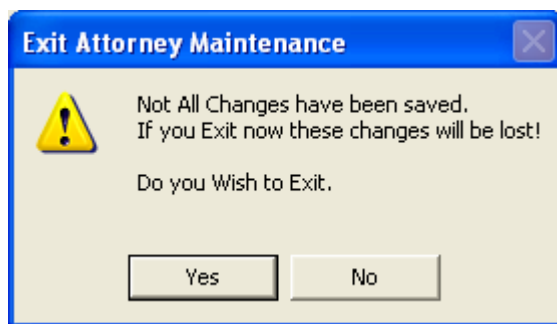
To save data, click "No," select the "Save" command button, and then exit again.

UNDOING

Pressing the "undo" button will remove all data changes on the current screen since the last save.

DELETIONS CANNOT BE UNDONE.

8

Deleting a Record

Pressing the delete command button will delete the current record. DELETIONS CANNOT BE UNDONE.

If the delete command button is pressed, the system will give a warning like the following:

Confirm Delete

⚠ Really Delete code <<ACT>> ?

Yes   No
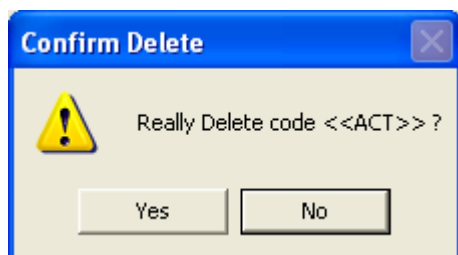
If a record being deleted has references elsewhere in the database, the system will not delete the record and will give the user a warning message like the following:

In Use

⚠ Code <<FIL>>
Is currently In use and can not be deleted.

OK
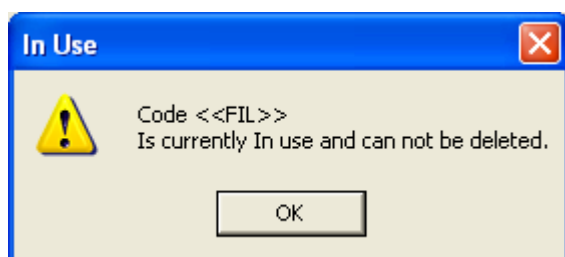
For example, if the user tried to delete a party but there were filings related to that party, a message would flash warning the user of that fact and the party would not delete.

An exception to this is the Case Files. If a Case is deleted **ALL RELATED RECORDS** (filings, parties, etc.) will be deleted with it!

Forms

MAIN FORM

The main form is the first screen seen upon opening the program. Escaping from other forms will return the user to the main screen. Command buttons to all the major forms are found on the main screen. (See below)

ACMS Version 4.28.25 - ACMS_9 Main											
Case	Assignments	Comments	Consolidations	Events	Filings	Issues	Parties	Trial#	Inquiry	Tools	Reports

TIPS   ?   ESC
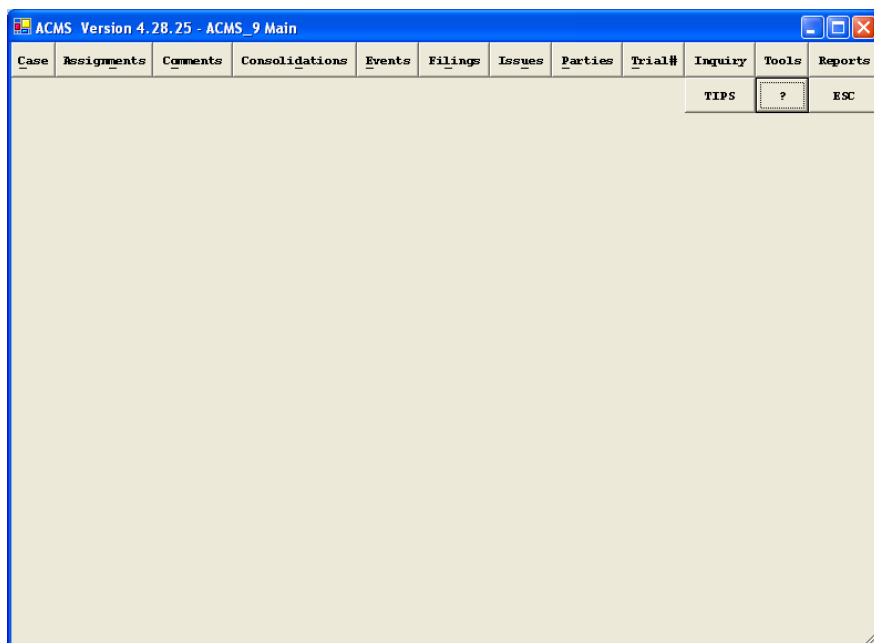
CASE MAINTENANCE FORM

The purpose of the case maintenance form is to allow addition, modification, and deletion of case information. The case maintenance form is reached from the main menu (and many other forms) by clicking the case command button.

There are two pages of case information.
Page 1:

Field	Length	Required	Value
Case Number	15	X	
County	3	X	County Maintenance Form
Disposition	500		Text
Disposition Type	3		Disposition Type Maintenance Form
Caption	500		Text
Calendar Type	12		Calendar Type Maintenance Form
Release Date	10		Date value
Final Order Date	10		Date value
Record Complete	10		Date value
Brief Complete	10		Date value
Related Appeal	1		Check = yes, unchecked = no
Settlement Checkbox	1		Check = yes, unchecked = no
Settlement Status	3		Settlement Status Maintenance Form
Final Appealable Order	3		Yes, No, ?
Case Submitted	1		B (briefs), O (oral argument)
Sensitivity Type	3		Sensitivity Type Maintenance Form

and Page 2

Field	Length	Required	Value
Supreme Court Case Type	2	X	Supreme Court Case Type Maintenance Screen
Trial Court Type	3		Trial Court Type Maintenance Screen
Trial Court Name	6		Trial Court Name Maintenance Screen
Trial Court Judge	6		Trial Court Judge Maintenance Screen
Trial Court Case Number	20		Trial Court Case Number
TC Final Order	10		Date value
TC Disposition	120		Text (Trial Court Disposition)
Original Action Type	3		Original Action Type Maintenance Form
Related Description	60		Text

ASSIGNMENT MAINTENANCE FORM

The purpose of the assignment maintenance form is to allow the user to add, delete, and modify which judges are assigned to cases. The assignment maintenance form is reached from the main menu (and many other forms) by clicking the assignments command button.

Field	Length	Required	Value
Individual Assigned	3	X	Individual Assigned Maintenance
Assignment Type	3	X	Assignment Type Maintenance
Assignment Start Date	10	X	Date
Assignment End Date	10		Date
Assignment Report Date	10		Date
Filing Number	7		From Filings Maintenance Form
Assignment Description	60		Text
Conflicts	60		Text
Assignment Disposition	60		Text
Comments	500		Text

COMMENTS MAINTENANCE FORM

The purpose of the comments maintenance form is to allow the user to add, delete, and modify case comments. The comments maintenance form is reached from the main menu (and many other forms) by clicking the comments command button.

Using the "Show All" button on this screen will concatenate the comment records into one viewable, scrollable box listing all of the comments text.

CONSOLIDATIONS MAINTENANCE FORM

The purpose of the Case Consolidations form is to allow the user to add, delete, and modify case consolidation information. This screen is used to link a case to a consolidation number created via the Tools section. The consolidations maintenance form is reached from the main menu (and many other forms) by clicking the consolidations command button.

Events Maintenance Form
The purpose of the Events maintenance form is to allow the user to add, delete, and modify event information. The Events maintenance form is reached from the main menu (and many other forms) by clicking the event command button.

Field	Length	Required	Value
Event Abbr	3	X	Event Type in Codes File
Filing Number	7		Filing Maintenance Form
Event Date	10	X	Date Value of Event
Event Time	10		Time value
Description	68		Text describing event
Event Room	3		Event Room Maintenance Form
Address (1)	60		Address Line 1
Address (2)	60		Address Line 2
City	30		City name
State	2		State Maintenance Form
Zip	10		Zip Code Maintenance Form
Comments	500		Text

FILING MAINTENANCE FORM

The purpose of the Filing Maintenance form is to allow the user to add, delete and modify case filings information. The maintain filings form (see below) is reached from the main menu (and many other forms) by clicking the filings command button.

Field	Length	Required	Value
Filing Number	Auto filled	X	Display Only
Filing Order Date	10		Date value
Category	3	X	Category Maintenance Form
Filing Type	3	X	Filing Maintenance Form
Description	500		Text
Docket Date	10		Date value
Filed By	10		A for "Attorney" or P for "Party"
Due Date	10		Date value
Motion Resolved	1		Y for Yes; N for No
Comment	500		Text

ISSUES MAINTENANCE FORM

The purpose of the issues maintenance form is to allow the user to add, delete, and modify case issues information. The issues maintenance form is reached from the main menu (and many other forms) by clicking the issues command button.

There are two pages of the Issues Maintenance Form.
Page 1 provides a description of a case's issues:

and Page 2 allows for entry of an issue's rating, related statutes, and comments:

PARTY MAINTENANCE FORM

The purpose of the parties maintenance form is to allow the user to add, delete, and modify case party and attorney party information. The party maintenance form is reached from the main menu (and many other forms) by clicking the parties command button.

There are two pages for the Party Maintenance Form.

Page 1 describes the party:

Field	Length	Required	Value
First Name	30		Text
Middle Name	30		Text
Last Name	60	X	Used for business and government entities
Appellation	6		Text
Title	30		Text
Party Status	8		(A)ctive/(I)nactive
Party Status Date	8		Date value
Rep Status	3		Representation Status Maintenance Form
Rep Status Date	8		Date value
Party Type [1-5]	3		Party Type Maintenance Form
Prisoner ID	8		A/N
Party Designator	3		Party Designator Maintenance Form
Party Order	3		Numeric

and Page 2 provides additional data (address information) and allows for an attorney link:

Field	Length	Required	Value
Address	60 in each line		
Institution	3		Institution Maintenance Form
City	30		
State	2		State Maintenance Form
Zip	10		Zip Code Maintenance Form
Phone	13		
Phone Extension	9		
FAX	13		
FAX Extension	6		
Email Address	40		Text
Comments	500		Text

The "Atty-Party" button on this screen will present a list box displaying all of the case's parties and the attorneys linked to each party.   Selecting an entry within the box will immediately display the party information (page1/page2).

Party-Attorney Maintenance Form

Clicking "Attorney" from the Party Maintenance Form will show the form below. This form allows the user to connect an attorney to a party.

Field	Length	Required	Value
Sequence Number	2	X	From Attorney Maintenance form
Appearance Date	10		Date
Date Completed	10		Date
Notification	1		Check = yes, unchecked =no
Lead Counsel	1		Check = yes, unchecked =no
Appointed	1		Check = yes, unchecked =no
Registration number	6	X	Attorney maintenance form

The "Atty-Party" button on this screen will present a list box displaying all of the case's parties and the attorneys linked to each party. Selecting an entry within the box will immediately display the party information (page1/page2) and the appropriate attorney data record.

TRIAL COURT NUMBER MAINTENANCE FORM

The purpose of the trial court number maintenance form is to allow the user to add, delete, and modify trial court numbers related to an appeals case. The trial court number maintenance form is reached from the main menu (and many other forms) by clicking the "Trial#" command button.

INQUIRY FORM

The Inquiry form allows searches for attorneys and parties by name and cases by Supreme Court case numbers or Trial Court Case Number. The final destination of all inquiries is the Case Maintenance screen. Use this form to find cases through attorneys, parties, case numbers, or trial court case numbers.

TOOLS FORM

Many of the maintenance forms such as conflicts and the codes files can be found on the tools maintenance form. These are reached by clicking on the Tools button on the Main Form.

Tools

Users

The purpose of the Users maintenance form is to allow the user to add, delete, and modify users and their access security levels. The security maintenance form is reached from the main menu (and many other forms) by clicking the Tools command button and then clicking on "Users."

Main Security Form:

Capabilities Form:

<u>Tables</u>

<u>Consolidations</u>

The purpose of the Consolidations Maintenance Form is to allow the user to add, delete, and modify consolidation numbers.

The consolidation number maintenance form is reached from the main menu (and many other forms) by clicking the Tools command button and then clicking on Consolidations.

Attorneys

The purpose of the Attorney maintenance form is to allow the user to add, delete, and modify attorneys and attorney address information. The attorney maintenance form is reached from the main menu by clicking the Tools command button and then clicking on "Attorneys."

There is one main form for the Attorney information:

Field	Length	Required	Value
Registration Number	6	X	Must be unique
Last Name	20	X	
First Name	15		
Middle Name 1	15		
Middle Name 2	15		
Appellation	5		
Title	50		
Comments	500		
Ohio Attorney	1		If unchecked, number is generated by ACMS

And there is also a form for entering the attorney's address:

Field	Length	Required	Value
Employer Name	40		
Employer Address line 1	60		
Employer Address line 2	60		
City	30		
State	2		State Maintenance Form
ZIP	10		Zip Code Maintenance Form
Phone	14		Letters and numbers okay
Phone Extension	6		Letters and numbers okay
FAX	14		Letters and numbers okay
FAX Extension	6		Letters and numbers okay
Email Address	40		
Invalid Address	1		Check = yes, unchecked=no
Primary Address	1		Check = yes, unchecked=no
Comment	500		Text
Archived	3		N(No); Y(Yes)

Re-Number Attorney

The purpose of the Re-Number Attorney form is to allow the user to alter or merge attorney registration information without having to delete and re-enter attorneys and attorney address information. The Re-Number Attorney form is reached from the main menu by clicking the Tools command button and then clicking on "Re-Number Attorney."

Form for re-numbering an attorney:

Form to merge two attorney numbers:

Conflicts

Conflicts with Case Maintenance Form

The conflict with case maintenance form allows the user to add, modify, and delete conflicts between individuals and a specific case number. The conflict maintenance form can be reached by clicking the Tools Command Button on the Main Form and then clicking "Conflicts With Case".

Field	Length	Required	Value
Individual	3	X	Individual Assigned Maintenance
Trial Court County	2	X	Trail Court County Maintenance
Case Number	15	X	Case Maintenance Form
Conflict Type	3	X	Conflict Type Maintenance Form
Comments	500		Text

Conflicts with Attorneys Maintenance Form

The conflict with attorneys maintenance form allows the user to add, modify, and delete conflicts between individuals and a specific attorney. The conflict maintenance form can be reached by clicking the Tools Command Button on the Main Form and then clicking "Conflicts With Attorneys". Creating conflict records via this form will result in automatically generating specific case conflict records when the named attorney is linked to a party within a case.

Field	Length	Required	Value
Individual	3	X	Individual Assigned Maintenance
Ohio Attorney	1		If checked=yes; unchecked=no
Attorney Number	7	X	Attorney Maintenance Form
Conflict Type	3	X	Conflict Type Maintenance Form
Comments	500		Text

Conflicts with TC Judges Maintenance Form

The "Conflict with TC Judges" maintenance form allows the user to add, modify, and delete conflicts between appellate court individuals and a specific trial court judge. The conflict maintenance form can be reached by clicking the Tools Command Button on the Main Form and then clicking "Conflicts With TC Judges". Creating conflict records via this form will result in automatically generating specific case conflict records when the named trial court judge is entered on the Case Maintenance Page 2 data field.

Field	Length	Required	Value
Individual	3	X	Individual Assigned Maintenance
Trial Court Judge	6	X	Trial Court Judge Maintenance
Conflict Type	3	X	Conflict Type Maintenance Form
Comments	500		Text

Conflicts with Parties Maintenance Form

The "Conflict with TC Judges" maintenance form allows the user to add, modify, and delete conflicts between appellate court individuals and a party to a case. The conflict maintenance form can be reached by clicking the Tools Command Button on the Main Form and then clicking "Conflicts With Parties". Creating conflict records via this form will result in prompting someone saving case party record data to choose to create specific case conflict records. This is useful for creating conflict records for appellate staff that may own stock in a company, or be part of a board of directors.

Field	Length	Required	Value
Individual	3	X	Individual Assigned Maintenance
Appellation	6		
First Name	30		
Middle Name	30		
Last Name	50		Can be business/state entities
Title	30		
Matching:	3		NOT = Do Not Match (default) CON= Must contain STA=Starts with
Conflict Type	3	X	Conflict Type Maintenance Form
Party or Entity	500		Text

Preferences

The Preferences Maintenance Form allows the user to modify how each function within ACMS is presented on the screen. The Preferences Maintenance Form can be reached by clicking the Tools Command Button on the Main Form and then clicking "Personal".

Personal

Codes Files

Assignment Type Maintenance Form

When this form is initialized, current Assignment Types and their descriptions are shown in a list view display area. If more assignment types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Assign Type Abbr:	3	X	Must be unique
Assign Type Desc:	20	X	
Archived	3		N=No (default);Y=Yes

Attorney Status Type Form

The purpose of the Attorney Status Type Maintenance form is to allow the user to add, delete, and modify Attorney Status. The Attorney Status Type Maintenance Form is reached from the "Attorney Statuses" command button of the Tools Form.

When this form is initialized, the current Attorney Statuses and their descriptions are shown in a list view display area. If more status types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Attorney Status Abbr:	3	X	Must be unique
Attorney Status Desc:	20	X	
Archived	3		N=No (default);Y=Yes

Calendar Type Maintenance Form

The Calendar Type Maintenance Form is reached from the "Calendar Type" command button of the Tools Form.

When this form is initialized, current Calendar Types and their descriptions are shown in a list view display area. If more Calendar types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Calendar Type Abbr:	3	X	Must be unique
Calendar Type Desc:	20	X	
Archived	3		N=No (default); Y=Yes

Category Maintenance Form

The Categories Maintenance Form (see below) is reached from the "Categories" command button of the Tools Form. When this form is initialized, current categories and their descriptions are shown in a list view display area. If more categories exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Category Type Abbr:	3	X	Must be unique
Category Type Desc:	20	X	
Archived	3		N=No (default); Y=Yes

Conflict Types Maintenance Form

The Conflict Types Maintenance Form is reached from the "Conflict Types" command button of the Tools Form. When this form is initialized, current Conflict Types and their descriptions are shown in a list view display area. If more Conflict types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Conflict Type Abbr:	3	X	Must be unique
Conflict Type Desc:	20	X	
Archived	3		N=No (default); Y=Yes

Disposition Type Maintenance Form

The Disposition Type Maintenance Form is reached from the "Disposition Type" command button of the Tools Form. When this form is initialized, current Disposition Types and their descriptions are shown in a list view display area. If more Disposition types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Disposition Type Abbr:	3	X	Must be unique
Disposition Type Desc:	20	X	
Associated Filing Type	3		Filing Types Maintenance
Associated Filing Category	3		Categories Maintenance
Archived	3		N=No (default); Y=Yes

Environment Constants

The Environment Constants Maintenance Form is reached from the "Environment Constants" command button of the Tools Form. ACMS uses values in this form for multiple functions and reports. Entry fields are labeled accordingly.

Field	Length	Required	Value
Court Name			
Address (Line 1 & 2)	30 each		
City	20		
Zip	10		
Phone	12		
FAX	12		
District			
District (Label)			
Presiding Judge			
Default County Number			Trial Court Counties Codes
District Reports Path			
AdHoc Reports Path			

Event Types

The Event Type Maintenance Form is reached from the "Events" command button of the Tools Form. When this form is initialized, current Event Types and their descriptions are shown in a list view display area. If more Event Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Event Type Abbr:	3	X	Must be unique
Event Type Desc:	20	X	
Usual Frequency	1		Numeric; 0 = default
Archived	3		N=No (default); Y=Yes

Event Rooms

The Event Rooms Maintenance Form is reached from the "Event Rooms" command button of the Tools Form. When this form is initialized, current Event Rooms and their descriptions are shown in a list view display area. If more Event Rooms exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Event Room Abbr:	1-3	X	Must be unique
Event Room Desc:	1-20	X	
Address (Line 1 & 2)	60 each		
City	30		
State	2		States Maintenance
Zip	10		Zip Codes Maintenance
Comments	500		Text
Archived	3		N=No (default); Y=Yes

Filing Types

The Filing Type Maintenance Form is reached from the "Filing Types" command button of the Tools Form. When this form is initialized, current Filing Types and their descriptions are shown in a list view display area. If more Filing types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Filing Type Abbr	3	X	Must be unique
Filing Type Desc	20	X	
Update Record Complete Date	3		No/Yes
Update Brief Complete Date	3		No/Yes
Usual Frequency	3		Numeric; default = 0
Cause Reactivation Clearing	3		No/Yes
Archived	3		N=No (default);Y=Yes
(Event) Associated Filing Category	3		Categories Maintenance
(Event) Associated Event Type	3		Events Maintenance
(Dependent) Filing Category	3		Categories Maintenance
(Dependent) Filing Type	3		Filing Types Maintenance
(Dependent) Party Type	3		Party Types Maintenance
(Dependent) Number Days	3		Numeric; Default = 0

Holidays

The Holiday Maintenance Form is reached from the "Holiday" command button of the Tools Form. When this form is initialized, current Holidays and their descriptions are shown in a list view display area. If more Holidays exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Date of Holiday	8	X	Date field
Holiday Desc:	20	X	

Individuals Assigned

The Individuals Assigned Maintenance Form is reached from the "Individuals Assigned" command button of the Tools Form. When this form is initialized, current Individuals Assigned and their descriptions are shown in a list view display area. If more Individuals Assigned exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Individual Abbr:	3	X	Must be unique
Last Name	19	X	
First Name	14		
Middle Name	15		
Attorney Number	7		Default = 0
Seniority	7		Default = 0
Archived	3		N=No (Default); Y=Yes

Institution Address

The Institution Address Maintenance Form is reached from the "Institution Address" command button of the Tools Form. When this form is initialized, current Institution Address codes and their descriptions are shown in a list view display area. If more Institution Addresses exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Institution Abbr	1-3	X	Must be unique
Description	1-20	X	
Address (Line 1 & 2)	60 each	X	
City	30	X	
State	2	X	States Maintenance
Zip	10	X	Zip Codes Maintenance
Phone	14		
Phone Extension	6		
FAX	14		
FAX Extension	6		
Email Address	40		
Comments	500		Text
Archived	3		N=No (default); Y=Yes

Original Action Types

The Original Action Type Maintenance Form is reached from the "Original Action Type" command button of the Tools Form. When this form is initialized, current Original Action Types and their descriptions are shown in a list view display area. If more Original Action Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Original Action Type Abbr:	3	X	Must be unique
Original Action Type Desc:	20	X	
Archived	3		N=No;Y=Yes

Party Designators

The Party Designators Maintenance Form is reached from the "Party Designators" command button of the Tools Form. When this form is initialized, current Party Designators and their descriptions are shown in a list view display area. If more Party Designators exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Party Designator Abbr:	3	X	Must be unique
Party Designator Desc:	20	X	
Archived	3		N=No (default); Y=Yes

Party Types

The Party Types Maintenance Form is reached from the "Party Types" command button of the Tools Form. When this form is initialized, current Party Types and their descriptions are shown in a list view display area. If more Party Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Party Type Abbr:	3	X	Must be unique
Party Type Desc:	20	X	
Archived	3		N=No;Y=Yes

Ratings

The Rating Maintenance Form is reached from the "Rating" command button of the Tools Form. When this form is initialized, current Ratings and their descriptions are shown in a list view display area. If more Ratings exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Rating Abbr:	3	X	Must be unique
Rating Desc:	20	X	
Archived	3		N=No; Y=Yes

Representation Status

The Representation Status Maintenance Form is reached from the "Representation Status" command button of the Tools Form. When this form is initialized, current Representation Status and their descriptions are shown in a list view display area. If more Representation Statuses exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Representation Status Abbr:	3	X	Must be unique
Representation Status Desc:	20	X	
Archived	3		No/Yes

Sensitivity Types

The Sensitivity Types Maintenance Form is reached from the "Sensitivity Types" command button of the Tools Form. When this form is initialized, current Sensitivity Types and their descriptions are shown in a list view display area. If more Sensitivity Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Sensitivity Type Abbr:	3	X	Must be unique
Sensitivity Type Desc:	20	X	
Archived	3		No/Yes

Settlements

The Settlement Maintenance Form is reached from the "Settlement" command button of the Tools Form. When this form is initialized, current Settlements and their descriptions are shown in a list view display area. If more Settlements exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Settlement Abbr:	3	X	Must be unique
Settlement Desc:	20	X	
Archived	3		No/Yes

States

The States Maintenance Form is reached from the "State" command button of the Tools Form. When this form is initialized, current State and their descriptions are shown in a list view display area. If more States exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
State Abbr:	3	X	Must be unique
State Desc:	20	X	
Archived	3		No/Yes

Statute Rules

The Statute Rules Maintenance Form is reached from the "Statute Rules" command button of the Tools Form. When this form is initialized, current Statute Rules and their descriptions are shown in a list view display area. If more Statute Rules exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Statute Rules Abbr:	3	X	Must be unique
Statute Rules Desc:	20	X	
Archived	3		No/Yes

Statute Rule Types

The Statute Rule Type Maintenance Form is reached from the "Statute Rule Type" command button of the Tools Form. When this form is initialized, current Statute Rule Types and their descriptions are shown in a list view display area. If more Statute Rule Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Statute Rule Type Abbr:	3	X	Must be unique
Statute Rule Type Desc:	20	X	
Archived	3		No/Yes

Supreme Court Case Types

The Supreme Court Case Type Maintenance Form is reached from the "Supreme Court Case Type" command button of the Tools Form. When this form is initialized, current Supreme Court Case Types and their descriptions are shown in a list view display area. If more Supreme Court Case Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Supreme Court Case Type Abbr:	3	X	Must be unique
Supreme Court Case Type Desc:	20	X	
Archived	3		No/Yes
(Guidelines) Pending	3		Numeric
(Guidelines) No Record	3		Numeric
(Guidelines) No Brief	3		Numeric
(Guidelines) Not Argued	3		Numeric
(Guidelines) Not Journalized	3		Numeric

Trial Court Counties

The Trial Court County Maintenance Form is reached from the "Trial Court County" command button of the Tools Form. When this form is initialized, current County Names and their descriptions are shown in a list view display area. If more County Names exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
County Number	3	X	Must be unique
County Name	20	X	
Archived	3		No/Yes

Trial Court Judges

The Trial Court Judge Maintenance Form is reached from the "Trial Court Judge" command button of the Tools Form. When this form is initialized, current Trial Court Judges and their descriptions are shown in a list view display area. If more Trial Court Judges exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Trial Court Judge Abbr:	3	X	Must be unique
Last Name	19	X	
First Name	14		
Middle Name	15		
Attorney Number	7		Numeric
Archived	3		No/Yes

Trial Court Names

The Trial Court Name Maintenance Form is reached from the "Trial Court Name" command button of the Tools Form. When this form is initialized, current Trial Court Names and their descriptions are shown in a list view display area. If more Trial Court Names exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Trial Court Name Abbr:	3	X	Must be unique
Trial Court Name Desc:	20	X	
Archived	3		No/Yes

Trial Court Types

The Trial Court Type Maintenance Form is reached from the "Trial Court Type" command button of the Tools Form. When this form is initialized, current Trial Court Types and their descriptions are shown in a list view display area. If more Trial Court Types exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Trial Court Type Abbr:	3	X	Must be unique
Trial Court Type Desc:	20	X	
Archived	3		No/Yes

Version Control

The Version Control Maintenance Form is reached from the "Version Control" command button of the Tools Form. When this form is initialized, current Versions and their descriptions are shown in a list view display area. If more Versions exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Version (3 fields)	3	X	Must be unique
Runable	3	X	No/Yes
Comment	500		Text

ZIP Codes

The Zip Code Maintenance Form is reached from the "Zip Code" command button of the Tools Form. When this form is initialized, current Zip Codes and their descriptions are shown in a list view display area. If more Zip Codes exist than can be displayed, then a vertical scroll bar will be included in the display.

Field	Length	Required	Value
Zip	10	X	
City	16	X	
State	2	X	States Maintenance

Reasonability Checks

SC Type vs Event Type

The SC Type vs Event Type Form is reached from the "SC Type vs Event Type" command button of the Tools Form.

Field	Length	Required	Value
Supreme Court Case Type	3	X	
Event Type	3	X	

SC Type vs Filing Type

The SC Type vs Filing Type Form is reached from the "SC Type vs Filing Type" command button of the Tools Form.

Field	Length	Required	Value
Supreme Court Case Type	3	X	
Filing Type	3	X	

SC Type vs Party Type

The SC Type vs Filing Party Form is reached from the "SC Type vs Party Type" command button of the Tools Form.

Field	Length	Required	Value
Supreme Court Case Type	3	X	
Party Type	3	X	

SC Type vs TC Type

The SC Type vs TC Party Form is reached from the "SC Type vs TC Type" command button of the Tools Form.

Field	Length	Required	Value
Supreme Court Case Type	3	X	
Trial Court Type	3	X	

Filing Type vs Category

The Filing Type vs Category Form is reached from the "Filing Type vs Category" command button of the Tools Form.

Field	Length	Required	Value
Supreme Court Case Type	3	X	
Trial Court Type	3	X	

Inquiries (Searching for Cases)

BY ATTORNEY
1. From the Main Screen and most other forms, click on the **Inquiries Command Button.**
2. **Enter all or part of the person's name** (not case sensitive). The more specific the search information, the more quickly the application will complete the search.
   Note: entering more than 20 characters in the last name field will result in no matches.

3. Click the **"Find Attorney" Command Button.**

4. **Click on the attorney** to see the parties the attorney has represented.
5. **Click on a party** to open the specific case data.

BY PARTY

1. From the Main Screen and most other forms, click on the **Inquiries Command Button.**
2. **Enter all or part of the person's name** (not case sensitive).
    Note: The more specific the search information, the more quickly the application will complete the search.

3. Click **"Find Party" Command Button**

4. **Click on the party** to open the case the specific case data.

BY APPELLATE COURT CASE NUMBER

1. From the Main Screen and most other forms, click on the **Inquiries Command Button.**
2. Enter the **Case Number** in the appropriate field, being sure to include any dashes.
3. Click on the **Find Case command button** to display a list view of all cases with that case number.

4. **Click on the case** to open it.

BY TRIAL COURT CASE NUMBER
1. From the Main Screen and most other forms, click on the **Inquiries Command Button.**
2. **Enter the Case Number** in the appropriate field, being sure to include any dashes.
3. Click on the **Find Trial Court Case command button** to open a list view of all cases with that trial court case number.

4. **Click on a case** to open it.

Assignments

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered.

ADD A NEW ASSIGNMENT
1. From the Main Menu or most other forms, click the **Assignments Command Button.**
2. The Assignment that appears will be for the case currently active in the case maintenance form.

3. **"Change" to the desired case**.
4. Check for conflicts by clicking **"Show Conflicts."**
5. Press **ESC** to close the conflicts.
6. Click **"New."**

7. **Enter** information.
8. Press **Save.**

SEARCH FOR ASSIGNMENTS

1. From the Main Menu or most other forms, click the **Assignments Command Button.**
2. The assignments that appear will be for the case currently active in the case maintenance form.
3. **"Change"** to the desired case.
4. Use the **navigational buttons** to scroll through all the assignments for the active case or use the **Search button** to show a list view of all assignments for the active case.

DELETE AN ASSIGNMENT

1. From the Main Menu or most other forms, click the **Assignments Command Button.**
2. **"Change" to the desired case**.
3. **Search** for the desired assignment.
4. Once on the desired assignment, press the **delete command button.**
5. **Confirm** deletion.

Attorneys

ADD A NEW ATTORNEY

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. Click **"New."**
4. **Enter** all information (lead zeros not required for attorney registration number).

5. Click **"Save."**

SEARCH FOR AN ATTORNEY

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. Click "**Search.**"
4. *Enter* search criteria. *Note: the attorney registration number does not require leading zeros. The name fields accept partial entry, for example "jo" for Jones, Johnson, etc.*
5. Click "**Search for Attorney.**"

6. **Click on desired attorney** to display information.

DELETING AN ATTORNEY

Note: Attorney Addresses must be deleted before an attorney can be deleted.

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. "**Search**" for desired attorney.
4. Once on the desired attorney, click on **delete.**
5. **Confirm** deletion.

Note: If there are any addresses in the system for the current attorney, system will issue a warning and will not delete the attorney. The addresses must be deleted first and then the attorney can be deleted.

ATTORNEY ADDRESSES

Add a new Attorney Address

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. **"Search"** for desired attorney
4. Click on "**Address**."
5. Click "**New"**
6. **Enter** information.

7. Click **"Save."**

Search for an Attorney Address

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. **"Search"** for desired attorney.
4. Click on "**Address."**
5. If there are any addresses in the system for the current attorney, the first one will appear. Use the **navigation buttons** to scroll through them or press the **Search** button to see them in a list view.

Deleting an Attorney Address

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. **"Search"** for the desired attorney.
4. Click on **Address.**
5. **Search** for the desired address.
6. Once on the desired address, click on the **delete** button.
7. **Confirm** deletion.

Copy an Attorney Address for an Envelope or Letter

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Attorneys" Command Button.**
3. "**Search"** for the desired attorney.
4. **Search** for the desired address.
5. Press the **clipboard button** to copy the attorney and address in letter or envelope ready format.

6. Then the user can go into a word document and press **paste or CTRL-V** to paste it.

CONNECTING AN ATTORNEY TO A PARTY

Connecting an Attorney to a Party

DELETING AN ATTORNEY'S CONNECTION TO A PARTY

Deleting an Attorney's Connection to a Party

ADD A NEW CASE
1. From the main form or most other forms, click on the **Case Command Button**.
2. Click the **"New"** command button
3. Specify the **county.**
Note: Either type the county number or the first few letters of the county name or search using either the F5 command or the binoculars to display a list view of all counties.

4. Enter the **case number.**
5. Enter information on page 1 of the case screen.
     ▪ **Case Caption**
     ▪ **Calendar Type**
6. Click **"Page 2"** to go the second page of the case screen.
7. Enter information:
     ▪ **SC Case Type**
     ▪ **Original Action Type OR**
     ▪ **TC Type**
     ▪ **TC Name**
     ▪ **TC Number**
     ▪ **TC Judge**
     ▪ **TC Disposition**
If there is more than one TC Number, type over the first one entered and answer "YES" to the "ADD" question provided.

8. Click **save.**
After the Case Screen is refreshed, if there is only one TC Number it will appear on page 2 of the case form. If there are multiple TC numbers, press on "V" next to the TC Number field to see a list view of them.

SEARCHING FOR A CASE

From a List

1. From the main form or most other forms, click on the **Case Command Button**.
2. Click on the **"Search"** command button.
3. **Double-click** on the desired case in the data grid.

By Trial Court Case Number

1. From the main form or most other forms, click on the **Case Command Button**.
2. From the Case Maintenance form, click on the **"TC#Search"** command button.
3. **Double-click** on the desired case in the data grid.

By County and Case Number (CHANGE Button)

1. From the main form or most other forms, click on the **Case Command Button**.
2. Click on **Change.**
3. Select the **county** and **case number.**

4. If typing in the fields instead of using the list views, you will need to press **tab.**
Note: Most forms have a change button – they all work exactly the same way.

COPY THE CASE CAPTION FOR JUDGMENT ENTRIES

1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change" to the desired case**.
3. Press the **clipboard button** to copy the case caption in judgment entry ready format.

4. Then the user can go into a word document and press **paste or CTRL-V** to paste it.

COPYING A CASE

1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change"** **to the desired case**.
3. From the Case Maintenance Form, click the **Copy Command button**
4. In the dialog window enter the **County and Case Number** (must be a unique combination).
5. Click the **Copy Case command button.**

6. **Confirm** copy.
7. Confirm whether or not the **filing information** should be copied.
8. In the new case, the following information be copied from the original:
   - Case Caption
   - Calendar Type
   - Supreme Court Case Type
   - Trial Court type
   - Trial Court Name
   - Trial Court Judge
   - Trial Court Disposition
   - Final Appealable Order
   - All party and party-attorney information is copied.
   - The user will be prompted to copy all filing, order, motions, connect information.
9. After a case has been copied, the copy will appear on the screen. The user may continue by **editing this new case information or adding data.**
10. Click **Save** when done.

CHANGE THE COUNTY OR CASE NUMBER OF AN EXISTING CASE (RENAME)

1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change" to the desired case**.
3. Click the **Rename** command button
4. In the dialog window, specify the **county** and **case number** fields.
5. Click the **Rename Case Command Button**.

6. **Confirm** Rename.
7. All case related information (Case, Comment, Party, Filing, Event, etc.). and all linked information (party to attorney, party to filings, etc.) will be changed accordingly.
8. **Save**
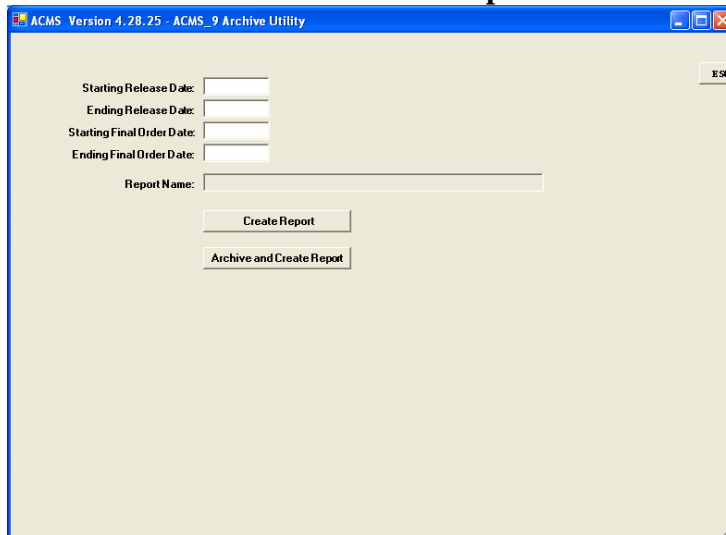
ARCHIVING/RETRIEVING A CASE

Archiving one case at a time
1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change"to the desired case**.
3. Click the **Archive** command button (if Archive is in ALL CAPS the case is already archived.)
4. **Confirm** Archive.
5. **Save**

Archive cases over a range of dates
1. From the Main Menu or most other forms, click on the **Tools Command Button.**
2. Click on the **Archive** command button.
3. Enter the desired **date ranges.**
4. Select **Archive and create report.**

Retrieving a case

Note: it is not possible to retrieve more than one case at a time.
1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change"** to the desired case.
3. Click the **Archive** command button (if Archive is in ALL CAPS the case is archived.)
4. **Confirm** Retrieve.
5. **Save**

DELETE A CASE
1. From the main form or most other forms, click on the **Case Command Button**.
2. **"Change"** to the desired case.
3. Once on the desired case, click **"Delete".**
Note: All related information in other forms will be deleted with the case.

Case Comments

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered.

ADD A NEW COMMENT
1. From the Main Menu or most other forms, click on the **Comments Command Button.**
2. **"Change"** to the desired case.
3. When on the desired case, press **"new"** to add a new comment.
4. Enter information.

5. Press **"Save."**

SEARCH FOR COMMENTS
1. From the Main Menu or most other forms, click on the **Comments Command Button.**
2. **"Change"** to the desired case.
3. Use the **navigational buttons** to scroll through all the comments for a case or click the **Search** button to see them in a list view.

DELETE A COMMENT
1. From the Main Menu or most other forms, click on the **Comments Command Button.**
2. **"Change" to the desired case**.
3. **Search** for the desired comment.
4. When on the desired comment, press the **"Delete" command button** to delete the comment.
5. **Confirm** deletion.

SHOW ALL COMMENTS
1. From the Main Menu or most other forms, click on the **Comments Command Button.**
2. **"Change" to the desired case**.
3. Press the "SHOW ALL" button to display the comments concatenated into one list view.

4. Use **ESC** to end the list view of the comments.
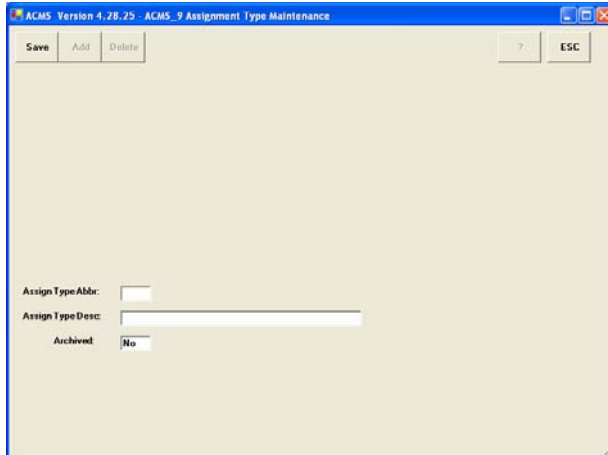
ASSIGNMENT TYPE

Adding an Assignment Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Assignment Types."**
3. Click the **"Add"** command button.

4. Enter the **Assignment Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Assignment Type Description.**
6. Click **Save.**

Modifying an existing Assignment Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Assignment Types."**
3. Click on the existing **Assignment Type** in the list view display.

4. Edit the **Assignment Type Description** or Required fields. Assignment Type Abbreviation may not be modified.
5. Click **Save.**

Deleting an Assignment Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Assignment Types."**
3. Click on the existing **Assignment Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Assignment Type is in use the program will not allow it to be deleted.

ATTORNEY STATUS TYPE

Adding a New Attorney Status

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Attorney Status Type."**
3. Click the **"Add"** command button.

4. Enter the **Attorney Status Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Attorney Status Type Description.**
6. Click **Save.**

Modifying an Attorney Status

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Attorney Status Type."**
3. Click on the existing **attorney status** in the list view display.

4. Edit the **Attorney Status Type Description** or Required fields. Attorney Status Type Abbreviation may not be modified.
5. Click **Save**

Deleting an Attorney Status

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Attorney Status Types."**
3. Click on the existing **Attorney Status Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Assignment Type is in use the program will not allow it to be deleted.
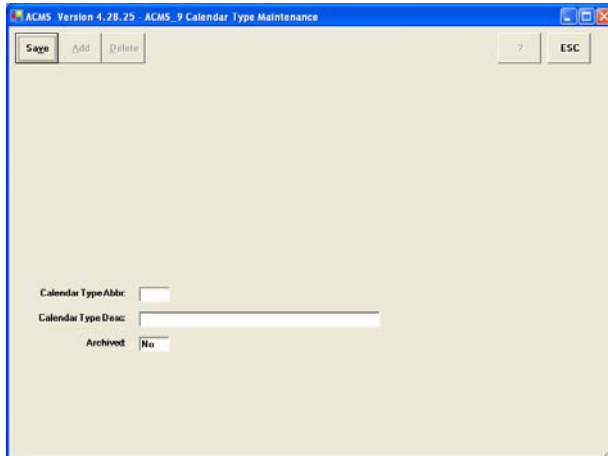
CALENDAR TYPE

Adding a Calendar Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Calendar Types."**
3. Click the **"Add"** command button.

4. Enter the **Calendar Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Calendar Type Description.**
6. Click **Save.**

Modifying an existing Calendar Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Calendar Types."**
3. Click on the existing **Calendar Type** in the list view display.

4. Edit the **Calendar Type Description** or Required fields. Calendar Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Calendar Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Calendar Types."**
3. Click on the existing **Calendar Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Calendar Type is in use the program will not allow it to be deleted.
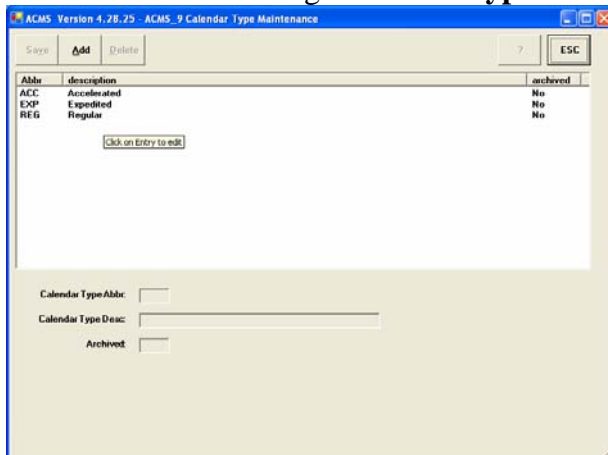
CATEGORY

Adding a Category

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Categories."**
3. Click the **"Add"** command button.

4. Enter the **Category Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Category Description.**
6. Click **Save.**

Modifying an existing Category

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Categories."**
3. Click on the existing **Category** in the list view display.

4. Edit the **Category Description** or Required fields. Category Abbreviation may not be modified.
5. Click **Save.**

Deleting a Category
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Categories."**
3. Click on the existing **Category** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Category is in use the program will not allow it to be deleted.

CONFLICT TYPES

Adding a Conflict Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Conflict Types."**
3. Click the **"Add"** command button.

4. Enter the **Conflict Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Conflict Type Description.**
6. Click **Save.**

Modifying an existing Conflict Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Conflict Types."**
3. Click on the existing **Conflict Type** in the list view display.

4. Edit the **Conflict Type Description** or Required fields. Conflict Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Conflict Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Conflict Types."**
3. Click on the existing **Conflict Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Conflict Type is in use the program will not allow it to be deleted.
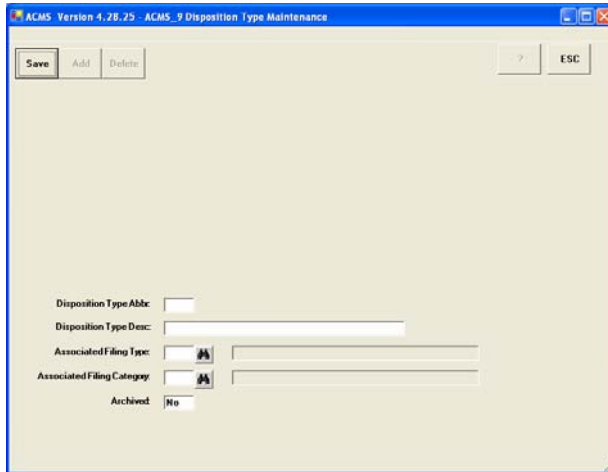
DISPOSITION TYPES

Adding a Disposition Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Disposition Types."**
3. Click the **"Add"** command button.

4. Enter the **Disposition Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Disposition Type Description.**
6. Enter the **Associated Filing Type**
7. Enter the **Associated Filing Category.**
8. Click **Save.**

Modifying an existing Disposition Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Disposition Types."**
3. Click on the existing **Disposition Type** in the list view display.

4. **Edit** any of the fields except the Disposition Type Abbreviation.
5. Click **Save.**

Deleting a Disposition Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Disposition Types."**
3. Click on the existing **Disposition Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Disposition Type is in use the program will not allow it to be deleted.

ENVIRONMENT CONSTANTS

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Environment Constants."**
3. **Edit** information.
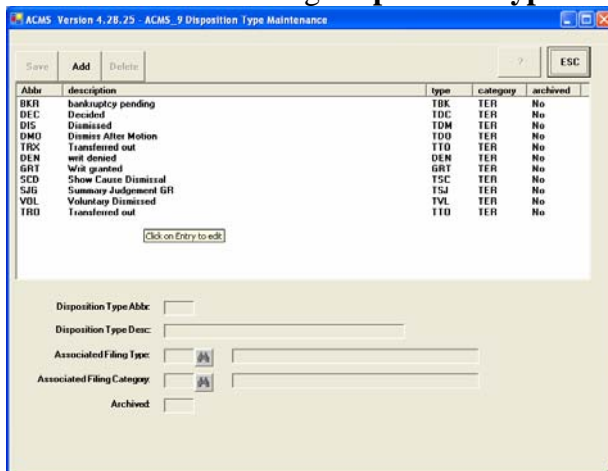4. Click **Save.**

EVENT TYPES

Adding an Event Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Types."**
3. Click the **"Add"** command button.

4. Enter the **Event Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Event Type Description.**
6. Click **Save.**

Modifying an existing Event Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Types."**
3. Click on the existing **Event Type** in the list view display.

4. Edit the **Event Type Description** or Required fields. Event Type Abbreviation may not be modified.
5. Click **Save.**

Deleting an Event Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Types."**
3. Click on the existing **Event Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Event Type is in use the program will not allow it to be deleted.
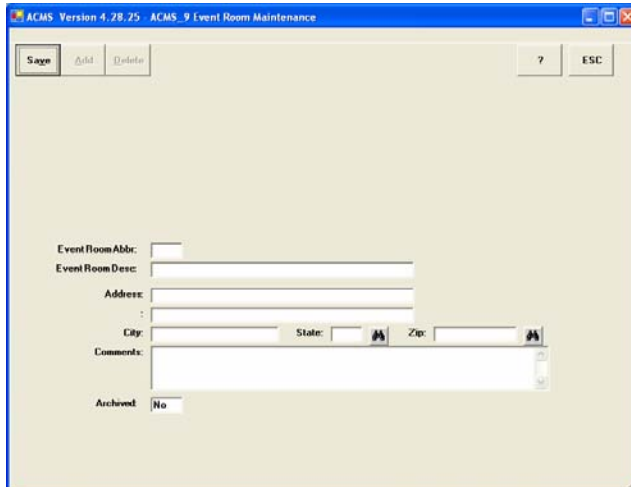
EVENT ROOMS

Adding an Event Room

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Rooms."**
3. Click the **"Add"** command button.

4. Enter the **Event Room Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Event Room Description.**
6. Enter **Address, Zip, City, State, Comments** if desired.
7. Click **Save.**

Modifying an existing Event Room

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Rooms."**
3. Click on the existing **Event Room** in the list view display.

4. Edit the **Event Room Description** or other fields.
5. Click **Save.**

Deleting an Event Room

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Event Rooms."**
3. Click on the existing **Event Room** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Event Room is in use the program will not allow it to be deleted.
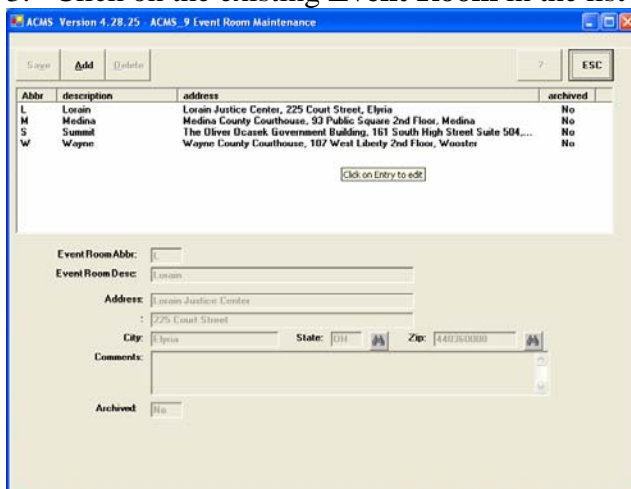
FILING TYPES

Adding a Filing Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Filing Types."**
3. Click the **"Add"** command button.

4. Enter the **Filing Type Abbreviation.** This is the code that will be referenced on other forms in the application. It is not possible to modify this field later.
5. Enter the **Filing Type Description.**
6. Set **Update Record Complete Date** to "Yes" if this filing should update Case Page 1.
7. Set **Update Brief Complete Date** to "Yes" if this filing should update Case Page 1.
8. If the filing is to trigger an event, enter the **Associated Filing Category, Associated Event Type** within the "Event Generation" shaded area.
9. If the filing is to create a dependent filing with a due date, enter **Filing Category, Filing Type, Party Type, Number Days** within the "Dependent Filing Generation shaded area.
10. Click **Save.**

Modifying an existing Filing Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Filing Types."**
3. Click on the existing **Filing Type** in the list view display.

4. **Edit** any of the fields except the Filing Type Abbreviation.
5. Click **Save.**

Deleting a Filing Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Filing Types."**
3. Click on the existing **Filing Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Filing Type is in use the program will not allow it to be deleted.

Event Generation

If **Associated Event Type** is filled in, then any time this filing type is used to create a case filing record, an event record of the indicated type will be created. For example, filing type ALB has an associated event type of SET. Thus, any time an ALB filing is created, the system will ask if you wish to also create a SET event type.

Do note that the **Associated Filing Category** must match the category choice entered when creating the case filing record. Specifically, if this value is set to "FIL", then an event of the type contained in the **Associated Event Type** will be created when a filing of value in **Filing Type Abbr,** Category = "FIL" will be created. If the **Associated Filing Category** is blank, then the associated event will NOT be created.

Dependent Filing Generation

HOLIDAYS

Adding a Holiday
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Holidays."**
3. Click the **"Add"** command button.

4. Enter the **Date of Holiday.** This field will not be able to be updated later.
5. Enter the **Holiday Description.**
6. Click **Save.**

Modifying an existing Holiday
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Holidays."**
3. Click on the existing **Holiday** in the list view display.

4. Edit the **Holiday Description**. It is not possible to edit the Date of Holiday.
5. Click **Save.**

Deleting a Holiday

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Holidays."**
3. Click on the existing **Holiday** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Holiday is in use the program will not allow it to be deleted.

INDIVIDUALS ASSIGNED

Adding an Individual Assigned

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Individuals Assigned."**
3. Click the **"Add"** command button.

4. Enter the **Individual Assigned Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Last Name** data **(required).**
6. Enter the **First Name; Middle Name** data**.**
7. Optional fields are **Attorney Number, Seniority.**
8. Click **Save.**

Modifying an existing Individual Assigned

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Individuals Assigned."**
3. Click on the existing **Individual Assigned** in the list view display.

4. Edit the **Name fields** or Required field. Individual Assigned Abbreviation may not be modified.
5. Click **Save.**

Deleting an Individual Assigned
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Individuals Assigned."**
3. Click on the existing **Individual Assigned** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Individual Assigned is in use the program will not allow it to be deleted.

INSTITUTION ADDRESS

Adding an Institution Address

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Institution Address."**
3. Click the **"Add"** command button.

4. Enter the **Institution Abbr.** This field will not be able to be updated later.
5. Enter the **Institution Description.**
6. Enter the **Address (two lines).**
7. Enter the **Zip** code; **City and State** will be automatically filled.
8. Enter **Phone/Phone Extension/FAX/FAX Extension/Email Address/Comments** if desired.
9. Click **Save.**

Modifying an existing Institution Address

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Institution Address."**
3. Click on the existing **Institution Address** in the list view display.

4. Edit the fields as needed.
5. Click **Save.**

Deleting an Institution Address

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Institution Address."**
3. Click on the existing **Institution Address** in the list view display.
4. Click **Delete.**
5. **Confirm** deletion.

Note: If the existing Holiday is in use the program will not allow it to be deleted.

ORIGINAL ACTION TYPES

Adding an Original Action
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Original Actions."**
3. Click the **"Add"** command button.

4. Enter the **Original Action Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Original Action Description.**
6. Click **Save.**

Modifying an existing Original Action
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Original Actions."**
3. Click on the existing **Original Action** in the list view display.

4. Edit the **Original Action Description**.
5. Click **Save.**

Deleting an Original Action

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Original Actions."**
3. Click on the existing **Original Action** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Original Action is in use the program will not allow it to be deleted.

PARTY DESIGNATORS
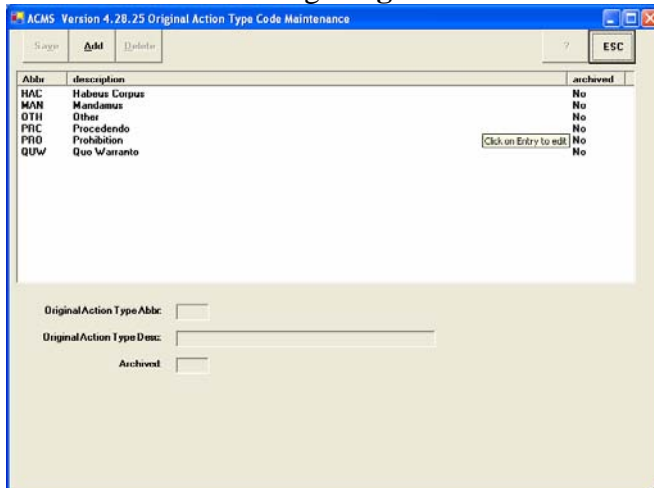
Adding a Party Designator

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Designators."**
3. Click the **"Add"** command button.

4. Enter the **Party Designator Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Party Designator Description.**
6. Click **Save.**

Modifying an existing Party Designator

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Designators."**
3. Click on the existing **Party Designator** in the list view display.

4. Edit the **Party Designator Description** or Required fields. Party Designator Abbreviation may not be modified.

5. Click **Save.**

Deleting a Party Designator

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Designators."**
3. Click on the existing **Party Designator** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Party Designator is in use the program will not allow it to be deleted.

PARTY TYPES

Adding a Party Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Types."**
3. Click the **"Add"** command button.

4. Enter the **Party Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Party Type Description.**
6. Click **Save.**

Modifying an existing Party Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Types."**
3. Click on the existing **Party Type** in the list view display.

4. Edit the **Party Type Description** or Required fields. Party Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Party Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Party Types."**
3. Click on the existing **Party Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Party Type is in use the program will not allow it to be deleted.

RATINGS

Adding a Rating

From the Main Menu and most other forms, click the **Tools** Command Button.
1. Click **"Ratings."**
2. Click the **"Add"** command button.

3. Enter the **Rating Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
4. Enter the **Rating Description.**
5. Click **Save.**

Modifying an existing Rating

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Ratings."**
3. Click on the existing **Rating** in the list view display.

4. Edit the **Rating Description** or Required fields. Rating Abbreviation may not be modified.
5. Click **Save.**

Deleting a Rating

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Ratings."**
3. Click on the existing **Rating** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Rating is in use the program will not allow it to be deleted.

REPRESENTATION STATUS

Adding a Representation Status

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Representation Status."**
3. Click the **"Add"** command button.

4. Enter the **Representation Status Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Representation Status Description.**
6. Click **Save.**

Modifying an existing Representation Status

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Representation Status."**
3. Click on the existing **Representation Status** in the list view display.

4. Edit the **Representation Status Description** or Required fields. Representation Status Abbreviation may not be modified.

5. Click **Save.**

Deleting a Representation Status
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Representation Status."**
3. Click on the existing **Representation Status** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Representation Status is in use the program will not allow it to be deleted.

SENSITIVITY TYPES

Adding a Sensitivity Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Sensitivity Types."**
3. Click the **"Add"** command button.

4. Enter the **Sensitivity Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Sensitivity Description.**
6. Click **Save.**

Modifying an existing Sensitivity Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Sensitivity Types."**
3. Click on the existing **Sensitivity Type** in the list view display.

4. Edit the **Sensitivity Description** or Required fields. Sensitivity Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Sensitivity Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Sensitivity Types."**
3. Click on the existing **Sensitivity Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Sensitivity Type is in use the program will not allow it to be deleted.

SETTLEMENTS

Adding a Settlement

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Settlements."**
3. Click the **"Add"** command button.

4. Enter the **Settlement Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Settlement Description.**
6. Click **Save.**

Modifying an existing Settlement

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Settlements."**
3. Click on the existing **Settlement** in the list view display.

4. Edit the **Settlement Description** or Required fields. Settlement Abbreviation may not be modified.
5. Click **Save.**

Deleting a Settlement
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Settlements."**
3. Click on the existing **Settlement** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Settlement is in use the program will not allow it to be deleted.

STATES

Adding a State

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"States."**
3. Click the **"Add"** command button.

4. Enter the **State Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **State Description.**
6. Click **Save.**

Modifying an existing State

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"States."**
3. Click on the existing **State** in the list view display.

4. Edit the **State Description** or Required fields. State Abbreviation may not be modified.

5. Click **Save.**

Deleting a State

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"States."**
3. Click on the existing **State** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing State is in use the program will not allow it to be deleted.

STATUTE RULES

Adding a Statute Rule

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rules."**
3. Click the **"Add"** command button.

4. Enter the **Statute Rule Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Statute Rule Description.**
6. Click **Save.**

Modifying an existing Statute Rule

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rules."**
3. Click on the existing **Statute Rule** in the list view display.

4. Edit the **Statute Rule Description** or Required fields. Statute Rule Abbreviation may not be modified.
5. Click **Save.**

Deleting a Statute Rule
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rules."**
3. Click on the existing **Statute Rule** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Statute Rule is in use the program will not allow it to be deleted.

STATUTE RULE TYPES

Adding a Statute Rule Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rule Types."**
3. Click the **"Add"** command button.

4. Enter the **Statute Rule Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Statute Rule Type Description.**
6. Click **Save.**

Modifying an existing Statute Rule Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rule Types."**
3. Click on the existing **Statute Rule Type** in the list view display.

4. Edit the **Statute Rule Type Description** or Required fields. Statute Rule Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Statute Rule Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Statute Rule Types."**
3. Click on the existing **Statute Rule Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Statute Rule Type is in use the program will not allow it to be deleted.

SUPREME COURT CASE TYPES

Adding a Supreme Court Case Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Supreme Court Case Types."**
3. Click the **"Add"** command button.

4. Enter the **Supreme Court Case Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Supreme Court Case Type Description.**
6. Click **Save.**

Modifying an existing Supreme Court Case Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Supreme Court Case Types."**
3. Click on the existing **Supreme Court Case Type** in the list view display.

4. Edit the **Supreme Court Case Type Description** or Required fields. Supreme Court Case Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Supreme Court Case Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Supreme Court Case Types."**
3. Click on the existing **Supreme Court Case Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Supreme Court Case Type is in use the program will not allow it to be deleted.

TRIAL COURT COUNTIES

Adding a Trial Court County

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Counties."**
3. Click the **"Add"** command button.

4. Enter the **Trial Court County Number.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Trial Court County Name.**
6. Click **Save.**

Modifying an existing Trial Court County

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Counties."**
3. Click on the existing **Trial Court County** in the list view display.

4. Edit the **Trial Court County Name** or Required fields. Trial Court County Number may not be modified.
5. Click **Save.**

Deleting a Trial Court County

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Counties."**
3. Click on the existing **Trial Court County** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Trial Court County is in use the program will not allow it to be deleted.

TRIAL COURT JUDGES

<u>Adding a Trial Court Judge</u>

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Judges."**
3. Click the **"Add"** command button.

4. Enter the **Trial Court Judge Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Trial Court Judge Last Name** (required)**.**
6. Enter the **Trial Court Judge First Name.**
7. Enter the **Trial Court Judge Middle Name.**
8. Enter the **Attorney Number** of the judge.
9. Click **Save.**

<u>Modifying an existing Trial Court Judge</u>

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Judges."**
3. Click on the existing **Trial Court Judge** in the list view display.

4. Edit the **Name Fields** or Required field. Trial Court Judge Abbreviation may not be modified.
5. Edit the **Attorney Number** if desired.
6. Click **Save.**

Deleting a Trial Court Judge

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Judges."**
3. Click on the existing **Trial Court Judge** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

Note: If the existing Trial Court Judge is in use the program will not allow it to be deleted.

TRIAL COURT NAMES

Adding a Trial Court Name
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Names."**
3. Click the **"Add"** command button.

4. Enter the **Trial Court Name Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Trial Court Name Description.**
6. Click **Save.**

Modifying an existing Trial Court Name
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Names."**
3. Click on the existing **Trial Court Name** in the list view display.

4. Edit the **Trial Court Name Description** or Required fields. Trial Court Name Abbreviation may not be modified.
5. Click **Save.**

Deleting a Trial Court Name
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Names."**
3. Click on the existing **Trial Court Name** in the list view display.
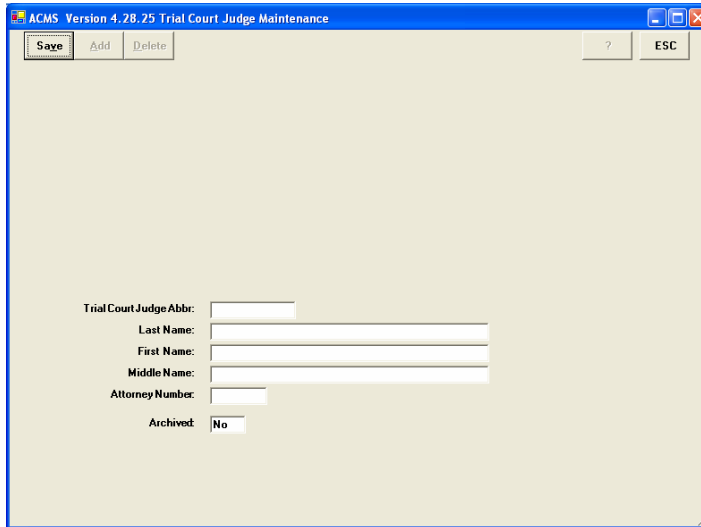4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Trial Court Name is in use the program will not allow it to be deleted.

TRIAL COURT TYPES

Adding a Trial Court Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Types."**
3. Click the **"Add"** command button.

4. Enter the **Trial Court Type Abbreviation.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **Trial Court Type Description.**
6. Click **Save.**

Modifying an existing Trial Court Type
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Types."**
3. Click on the existing **Trial Court Type** in the list view display.

4. Edit the **Trial Court Type Description** or Required fields. Trial Court Type Abbreviation may not be modified.
5. Click **Save.**

Deleting a Trial Court Type

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Trial Court Types."**
3. Click on the existing **Trial Court Type** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.
   Note: If the existing Trial Court Type is in use the program will not allow it to be deleted.

VERSION CONTROL

Adding a Version Control entry
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Version Control."**
3. Click the **"Add"** command button.

4. Enter the **Version** numbers**.**
5. Enter whether the version is **Runable** (Yes/No)**.**
6. Enter a **Comment** describing the version number.
7. Click **Save.**

Modifying an existing Version Control Entry
1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Version Control."**
3. Click on the existing **Version** in the list view display.

4. Edit the **Version** or Required fields.

5. Click **Save.**

Deleting a Version Control Entry

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Version Control."**
3. Click on the existing **Version** in the list view display.
4. Click **delete.**
5. **Confirm** deletion.

ZIP CODES

Adding a Zip Code

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Zip Codes."**
3. Click the **"Add"** command button.

4. Enter the **Zip Code.** This is the code that will be reference on other forms in the application. It is not possible to modify this field later.
5. Enter the **City.**
6. Enter the **State** (must be valid entry from States file)**.**
7. Click **Save.**

Modifying an existing Zip Code

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Zip Codes."**
3. Click on the existing **Zip Code** in the data grid display.

4. Edit the **City** or **State** fields. Zip Code may not be modified.
5. Click **Save.**

Deleting a Zip Code

1. From the Main Menu and most other forms, click the **Tools** Command Button.
2. Click **"Zip Codes."**
3. Click on the existing **Zip Code** in the data grid display.
4. Click **delete.**
5. **Confirm** deletion.
Note: If the existing Zip Code is in use the program will not allow it to be deleted.
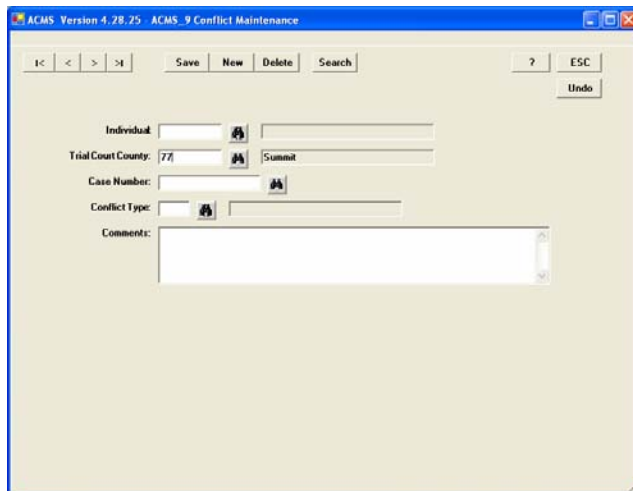
Conflicts

ACMS provides multiple methods for creating and storing conflict records for appellate cases. Users may create a conflict record for a specific individual case, or by creating tables that will create case conflict records based on case data matching certain values. These records are to be created whenever any individual on the appellate staff (most typically panel judges or law clerks) has a potential conflict with a case due to the case's trial court judge, the parties' attorneys, or the named parties within a case.

The sections below describe the creation of "Conflicts with Case", "Conflicts with Attorneys", "Conflicts with Trial Court Judges", and "Conflicts with Parties".

CONFLICTS WITH CASE

Add a New Conflict
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Case" Command Button.**
3. Click **"New."**

4. **Enter** all information.
5. Click **"Save."**
6. If applicable, the program will ask if you want to duplicate this conflict across all consolidated cases. **Click yes or no.**

Search for Conflicts
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Case" Command Button.**
3. Click **"Search."**
4. **Enter** criteria. (*Leaving County value blank will display all conflict records.*)
5. Click "**Search Now."**

6. Select and edit desired conflict data fields.

7. Click **"Save."**

View Conflicts for a Case

On the Case Form, the Assignments Form and the Events Form there is a button called **"Show Conflicts."** Clicking that button will display all existing conflicts for the current case.

Delete a Conflict with a Case
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Case" Command Button.**
3. **"Search"** for desired conflict.
4. When on the desired conflict press **delete.**
5. **Confirm** deletion.

CONFLICTS WITH ATTORNEYS

Add a New Conflict with Attorney
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Attorneys" Command Button.**
3. Click **"New."**

4. **Enter** all information.
5. Click **"Save."**
6. This utility will *create* conflict records for specific cases that have the entered attorney linked to a party. The conflict records are created if a case is open, and without assignment records.
7. Similarly, when an attorney is linked to a party within a case being newly entered, the application will *create* a case conflict record immediately after the party/attorney link is saved.

Search for Conflicts with Attorneys
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Attorneys" Command Button.**

3. Click **"Search."**
4. **Enter** criteria.
5. Click "**Search Now.**"

6. Select and edit desired conflict data fields.

7. Click **"Save."**

Delete a Conflict with Attorney

6. From the main screen and most other forms, press the **"Tools" Command Button.**
7. Click the **"Conflicts With Attorney" Command Button.**
8. **"Search"** for desired conflict.
9. When on the desired conflict press **delete.**
10. **Confirm** deletion.
11. *Deleting* specific attorney/individual conflict records will *automatically* delete specific case conflict records *if* the case is open and has no open assignment records.

CONFLICTS WITH TC JUDGES

Add a New Conflict with TC Judge
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With TC Judges" Command Button.**
3. Click **"New."**

4. **Enter** all information.
5. Click **"Save."**
6. This utility will *create* conflict records for specific cases that have the entered trial court judge value in its record. The conflict records are created if a case is open, and without assignment records.
7. Similarly, when a trial court judge value is saved on a case being newly entered, the application will *create* a case conflict record immediately after the case (page 2) is saved.

Search for Conflicts with TC Judges
1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With TC Judges" Command Button.**
3. Click **"Search."**
4. **Enter** criteria.
5. Click "**Search Now."**

6. Select a record and edit desired conflict data fields.

7. Click **"Save."**

Delete a Conflict with TC Judges

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With TC Judges" Command Button.**
3. **"Search"** for desired conflict.
4. When on the desired conflict press **delete.**
5. **Confirm** deletion.
6. *Deleting* specific trial court judge/individual conflict records will *automatically* delete specific case conflict records *if* the case is open and has no open assignment records.

CONFLICTS WITH PARTIES

Add a New Conflict with a Party

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With TC Parties" Command Button.**
3. Click **"New."**

4. **Enter** all information.
5. Note: Matching criteria defaults to "NOT" (Do Not Match); other choices are "CON" (Contains), and "STA" (Starts with). Typically, the last name field is used most frequently, since it may contain business entity names.
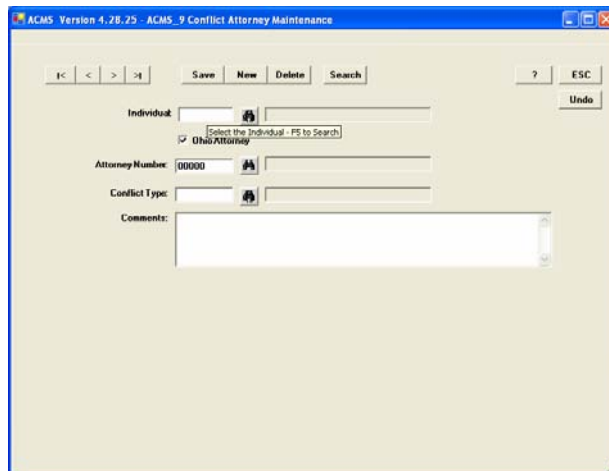6. Click "Save."

Search for Conflicts with Parties

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Parties" Command Button.**
3. Click **"Search."**
4. **Enter** criteria.
5. Click "**Search Now."**

6. Select and edit desired conflict data fields.

7. Click **"Save."**

Delete a Conflict with Parties

1. From the main screen and most other forms, press the **"Tools" Command Button.**
2. Click the **"Conflicts With Parties" Command Button.**
3. [**"Search"** for desired conflict.](#)
4. When on the desired conflict press **delete.**
5. **Confirm** deletion.
6. *Deleting* specific trial court judge/individual conflict records will **not** *automatically* delete specific case conflict records. Users must search for cases with similar party names and delete conflict records via the "Conflicts with Case" method. Deleting here only deletes the potential conditions for a conflict with a case's party.

Creating Party Conflicts within a specific case

1. Upon saving a Party record within a case, if the party's name meets any "Conflicts with Parties" criteria record, the user will see the following screen:

2. Selecting a record from the "Possible Conflict" list will copy conflict data to the lower box.
3. Selecting a record from the "Applicable Conflicts" list will remove the potential data from creation.
4. Using the "**Create Conflicts"** button will create conflict records for *this case*.
5. Using the "**No Conflicts"** button will exit the function to create a conflict record for the case being entered.

Consolidating Cases

ACMS supports the consolidation of cases by generating filings, assignments, and events for a set of consolidated cases. Once cases are linked to a consolidation number, entry personnel are prompted as to whether they want to duplicate a filing/assignment/event for the set of consolidated cases. Answering "YES" to such prompts will create identical transactions under each case of the consolidated set. These transaction (filings/assignments/events) data records are linked with a non-visible sibling number so that subsequent updates to such a record can then be updated identically for the rest of the set of cases.

To create a set of consolidated cases, entry personnel need to first create a consolidation number. That number is then linked to each of the cases in the set and the start date of the consolidation is then created for each case in the set. Filings/assignments/events with action dates equal to or subsequent to the consolidation start date are then able to be linked via sibling number, automatically generated for set of cases, and available for common (identical) updates at a later time.

To remove a case from a consolidated set, entry personnel can either update the consolidation number link record with a consolidation end date, or delete the consolidation number link from the database. The rest of the set then remains consolidated for ease of entry and updating.

The sections below describe the use of the **"Tools/Consolidations"** screens and the "**Main Menu/Consolidations"** function.

CONSOLIDATION NUMBERS

Add a New Consolidation Number
1. From the Main Menu or most other forms, click on the **Tools Command Button.**
2. Click on the **Consolidations Command Button**
3. Click **"New"**

4. **Enter** information about the consolidation in the **Comments** text.
5. Click **"Save."** The application will generate the new Consolidation Number.

Search for Consolidation Numbers

1. From the Main Menu or most other forms, click on the **Tools Command Button**
2. **Click on the Consolidations Command Button**
3. Press **Search.**
4. **Enter** desired Criteria and press **Search for Consolidated.**
(Making all criteria fields blank will result in the list of all consolidation numbers in the database.)

5. **Click** on desired consolidation number from the list view.

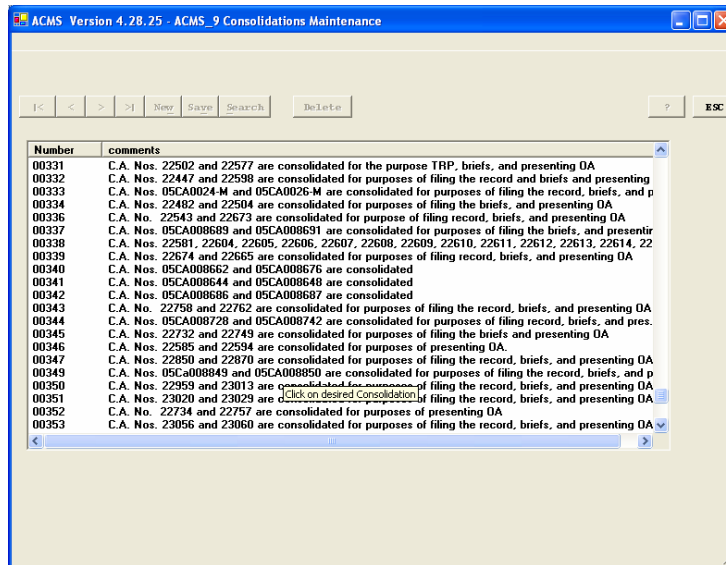Delete Consolidation Number

1. From the Main Menu or most other forms, click on the **Tools Command Button.**
2. Click on the **Consolidations Command Button**
3. <u>**Search** for the desired Consolidation Number.</u>
4. Once on the desired consolidation number, press **Delete.**
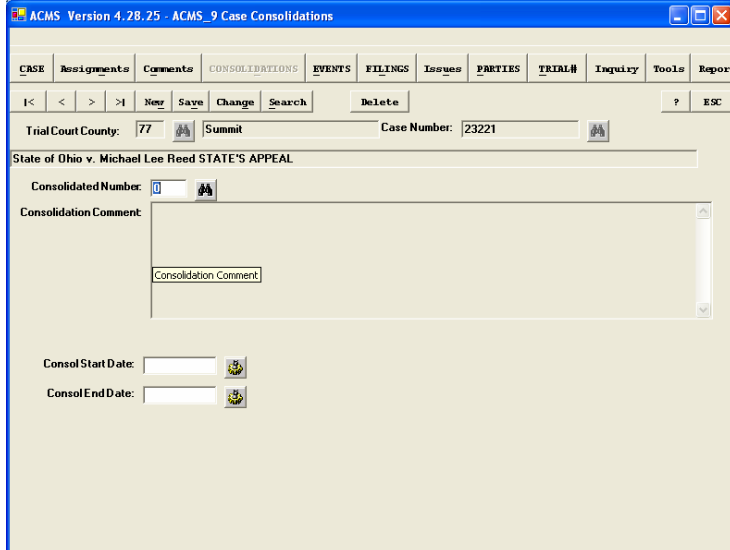
Note that if Case numbers appear in the lower box, the consolidation number cannot be deleted since it is still in use.
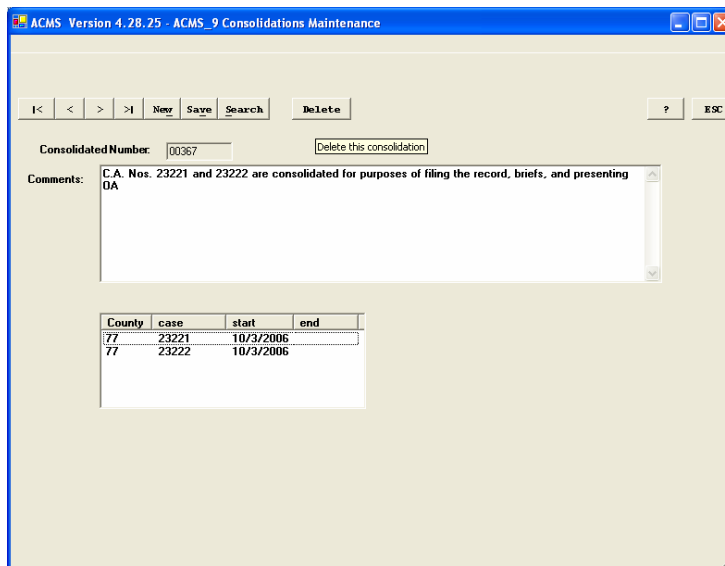
ADD A CONSOLIDATION TO A CASE

1. From the Main Menu or most other forms, click on the **Consolidations Button.**
2. **"Change"** to the desired case.
3. When on the desired case, press **"new"** to add a new consolidation.
4. **Enter** information.

5. A **consolidation number** is required. Use the search binoculars to search for the appropriate consolidation number to assign.
6. **Consolidation Start Date** is required. This date is critical to generation/updating of filings, events, assignments across a set of consolidated cases.
7. **Consolidation End Date** is to be entered when a case is no longer part of a set of consolidated cases.
8. Click **"Save."**

SEARCH FOR CASE'S CONSOLIDATIONS

1. From the Main Menu or most other forms, click on the **Consolidations Command Button.**
2. **"Change"** to the desired case.
3. Use the **navigational buttons or Search** to scroll through all the consolidation numbers a case may be associated with.

DELETE CONSOLIDATION FROM A CASE

1. From the Main Menu or most other forms, click on the **Consolidations Button.**
2. **"Change"** **to the desired case**.
3. **Search** for the desired consolidation.
4. Once on the desired consolidation, press **Delete.**

Note: Only the consolidation number link will be deleted. The consolidation number data can be deleted from the Tools/Consolidations menu item.

Events

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered.

ADD A NEW EVENT
1. From the Main Menu or most other forms, click the **Events Command Button.**
2. The event that appears will be for the case currently active in the case maintenance form.
3. **"Change" to the desired case**.
4. Check for conflicts by clicking on the **Show Conflicts Button.**
5. Click **New.**

6. **Enter** information. **Event Abbr** and **Event Date** are required.
7. Press **Save.**

SEARCH FOR EVENTS
1. From the Main Menu or most other forms, click the **Events Command Button.**
2. The event that appears will be for the case currently active in the case maintenance form.
3. **"Change"** to the desired case.
4. Use the **navigation buttons** to scroll through all the events for the current case or click the **Search** button to see them in a list view.

DELETE AN EVENT

1. From the Main Menu or most other forms, click the **Events Command Button.**
2. The event that appears will be for the case currently active in the case maintenance form.
3. **"Change"** **to the desired case**.
4. Search for the desired event.
5. Once on the desired event, press the **delete command button.**
6. **Confirm** deletion.

Filings

*In ACMS, filings are distinguished by Category: **MOT for Motion, ORD for Orders, FIL for Filings, TER for Terminations.** Category types FIL and TER are critical to the Presiding Judge Report statistics.*

ADD A NEW FILING

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered. Filings cannot be entered until the parties are entered for a case. Each filing requires a link to one (or more) of the parties in a case.

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change" to the desired case**.
3. Click **"New."**
4. **Select the party** related to the filing.

5. **Enter** information.
    - Filing/Order Date (should be blank for a filing that is due)
    - Category (If **MOT**, Motion Resolved field must be updated.)
    - Filing Type
    - Description or Comments, if applicable
    - Due Date (use the Date Calculator.)

6. Click **save.**

SEARCHING FOR FILINGS

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change" to the desired case**.
3. Use the **navigational buttons** to scroll through all the filings for that case or use the **search** button to see them in a list view.

DELETE A FILING

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change" to the desired case**.
3. **Search** for the desired filing.
4. Once on the desired filing, click **delete.**
5. **Confirm** deletion.

PARTY-FILING JOINS

Adding a New Party-Filing Join

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change" to the desired case**.
3. **Search** for the desired filing.
4. Click the **Join** command button.
5. Click the **New** Command button.
6. **Click on the party** you want joined to the filing.

7. Click the **save command button.**

Searching for Parties-Filing Joins

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change"** **to the desired case.**
3. **Search** for the desired filing.
4. Click the **Join** command button.
5. Use the **navigational command buttons** or the **search button** to display all parties related/joined to this filing.

Deleting a Party-Filing Join

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change"** **to the desired case.**
3. **Search** for the desired filing.
4. Click the **Join** command button.
5. Search for the desired Party-Filing Join.
6. Click **Delete**.
7. **Confirm** deletion.

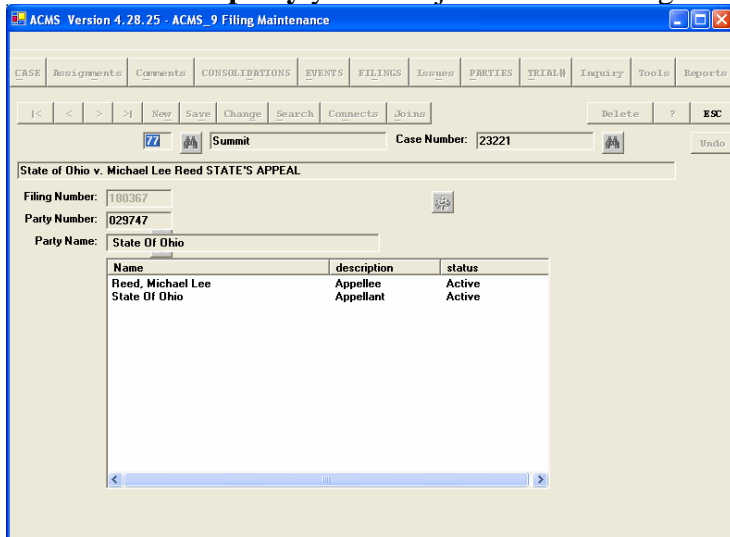## CONNECTING MOTIONS, ORDERS AND FILINGS

Adding a New Filing Connection

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change"** **to the desired case.**
3. **Search** for the desired filing.
4. Click **"Connects."**
5. In the dialog window, click on the **Build New Connection** command button.
6. The filings which may be connected to the current filing will appear in a list view.

7. **Click on the desired entry** to make the connection.
8. **Save.**

NOTE: If the user attempts to connect a category that cannot be connected, the program will issue a warning of that fact. If there are no filings which can be connected to the current filing, the program will also warn the user.

Searching for a Filing Connection

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change"** **to the desired case.**
3. **Search** for the desired filing.
4. Click **"Connects"** to see all connections for that filing.

Deleting a Filing Connection

1. From the main form or most other forms, click the **Filings command button.**
2. **"Change"** **to the desired case.**
3. **Search** for the desired filing.
4. Click **"Connects."**
5. **Click** on filing you wish to disconnect from the current filing.
6. Click on the **Delete Existing Connection** command button.

7. **Confirm** deletion.

Issues

Note: basic case information must be entered before assignments, comments, consolidations, events, issues, party, etc., can be entered.

ADD A NEW ISSUE

1. From the Main Menu or most other forms, click on the **Issues Command Button.**
2. The Issues that appear will be for whichever case is active in the case maintenance form.
3. **"Change"** to the desired case.
4. Press **"new"** to add a New issue.
5. **Enter** information on both page 1

6. Press **Page 2**
7. **Enter** information.

8. Press **"Save."**
Note: There can only be one issue record for each case.

SEARCH FOR ISSUES BY CASE NUMBER
  1. From the Main Menu or most other forms, click on the **Issues Command Button.**
  2. **"Change"** to the desired case.

  Note: There is only one issue record for each case.

DELETE AN ISSUE
  1. From the Main Menu or most other forms, click on the **Issues Command Button.**
  2. The Issue that appears will be for whichever case is active in the case maintenance form.
  3. **"Change"** to the desired case.
  4. When on the desired case, press the **"Delete"** command button to delete the issue.
  5. **Confirm** deletion.

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered.

ADD A NEW PARTY

Note: A party record exists for each party for each case. If a party is in two cases, then they will have two party records (a record linked to each case).

1. From the Main Menu or most other forms, click on the **Parties Command Button.**
2. The parties that appear will be for whichever case is active in the case maintenance form.
3. **"Change"** **to the desired case**
4. Click the **NEW** command button on the first page of the Party Maintenance Form.

5. **Enter** all known information on Page 1.
   - Enter Appellee or Appellate information as Party Type 1. Then enter additional Party Types as desired.
   - If a party is "PRO SE", enter a "prisoner ID" if available.
6. Click the **Page 2** button to go to the second page and enter additional information.
7. On **Page 2,** if an institution is chosen (for a PRO SE party), the address fields will fill automatically.

8. **Save.**

SEARCHING FOR PARTIES

1. From the Main Menu or most other forms, click the **Parties** Command Button.
2. **"Change"** **to the desired case**.
3. Use the **navigational buttons** to scroll through the parties for the selected case or click the **search button** to see them in a list view.

DELETING A PARTY

1. From the Main Menu or most other forms, click the **Parties** Command Button.
2. **"Change"** **to the desired case**.
3. **Search** for the desired party.
4. Once on the desired party, click the **delete** command button.
5. **Confirm** deletion.

ATTORNEY-PARTY CONNECTIONS

Adding a New Attorney-Party Connection

1. From the main form or most other forms, click on the **Parties command button**.
2. **"Change"** to the appropriate case.
3. **Search** for the desired party.
4. Click on the **Attorney command button**.

5. Click the **New** command button.

6. Click the search binoculars next to **Registration Number** to search for an attorney.
7. In the form that appears, specify **any part of the name**, partial entries accepted.
8. Click the **Search for Attorney** Command Button.

9. **Click on the desired attorney** to associate that attorney with the current party for the current case.

10. Use the **Sequence Number** field to select which address the attorney is using for the current case.

11. **Enter** any additional information.
   ▪ Lead Counsel and Notification fields default to "yes."
12. **Save.**

Searching for an Attorney-Party Connection

1. From the main form or most other forms, click on the **Parties command button**.
2. **"Change"** to the appropriate case.
3. **Search** for the desired party via the **Atty-Party button.**
4. Click the **attorney button.**

5. Use the **navigational buttons** to scroll through all the attorneys connected to the party or press the **search** button to see them in a list view.

Deleting an Attorney-Party Connection

1. From the main form or most other forms, click on the **Parties command button**.
2. **"Change"** to the appropriate case.
3. **Search** for the desired party.
4. Click on the **Attorney command button**.
5. **Search** for the desired attorney connection.
6. Once on the desired attorney connection, click the **Delete** command button.
7. **Confirm** deletion.

Note: The attorney will still be in the database. Attorneys can only be deleted through the attorney maintenance form. Only the connection to this party for this case will be deleted.

ACMS provides multiple data reasonability checks in order to enhance data entry edits. These checks are to insure that the correct event, filing, party, or trial court types are used for cases with a specific Supreme Court case type. Edits are also provided to insure that filing category and filing types are compatible and to prevent errors in the Presiding Judge Report.

SC TYPE VS EVENT TYPE

Entries here will *permit* creation of case **Event** records if the case's Supreme Court Case type and the entered event type are listed in this table.

1. From the **Tools Menu**, click on the **SC Type vs Event Type** button.

2. Use the **Add** Button to enter a new entry.
3. Click **Save.**
4. Select an entry in the list view to **edit** its contents.
5. To **Delete** and entry, select it from the list view; click **Delete** button.

SC TYPE VS FILING TYPE

Entries here will *prohibit* the creation of specified **Filing Type** records if a case's Supreme Court case type and the entered filing type are listed in this table.

1. From the **Tools Menu**, click on the **SC Type vs Filing Type** button.

2. Use the **Add** button to enter a new Supreme Court Case Type/Filing Type pair.
3. Select an entry in the list view to **edit** its contents.
4. To **Delete** an entry, select it from the list view; click **Delete** button.

SC TYPE VS FILING TYPE

Entries here will *prohibit* the creation of specified **Party Type** records if a case's Supreme Court case type and the entered party type are listed in this table.

1. From the **Tools Menu**, click on the **SC Type vs Party Type** button.

2. Use the **Add** button to enter a new Supreme Court Case Type/Party Type pair.
3. Select an entry in the list view to **edit** its contents.
4. To **Delete** an entry, select it from the list view; click **Delete** button.

SC TYPE VS TC TYPE

Entries here will *permit* the creation of specified **Trial Court Type** data if a case's Supreme Court case type and the entered trial court type are listed as a pair in this table.

1. From the **Tools Menu**, click on the **SC Type vs TC Type** button.

2. Use the **Add** button to enter a new Supreme Court Case Type/Trial Court Type pair.
3. Select an entry in the list view to **edit** its contents.
4. To **Delete** an entry, select it from the list view; click **Delete** button.

FILING TYPE VS CATEGORY

Entries here will *prohibit* the creation of specified **Filing Category/Filing Type** data if the entered filing category and filing type are listed as a pair in this table.

1. From the **Tools Menu**, click on the **Filing Type vs Category** button.

2. Use the **Add** button to enter a new Filing Category/Filing Type pair.
3. Select an entry in the list view to **edit** its contents.
4. To **Delete** an entry, select it from the list view; click **Delete** button.

CODES FILES

Many of the fields used draw their information from a specific list (for example, the filing abbreviation). In this document, those lists are referred to as "Codes Files". The code file contains the abbreviation used on other forms as well as the description of that abbreviation. The Codes Files can be found on the Tools Form.

The Presiding Judge Report searches for specific codes. Not <u>all</u> of the following codes must be used, but if any of the codes below are replaced with alternate codes, the report will not run properly.

FILINGS:
Reactivations:
REA - Reactivation
NOA - Notice of Appeal
MDA - Motion for Delayed Appeal
MLA - Motion for leave to appeal
COM – Complaint (for Original Action type cases)
MUR - Murnahan
TRI - Transferred in

Terminations:
TER - Termination
TVL - Voluntary Dismissal
TSC - Show Cause Dismissal
TDO - Dismiss after motion
MUD - Murnahan Denied
TDC - Decision
TBK - Bankruptcy

Briefs:
CAB - Corrected Appellant's Brief
ALB - Appellee's Brief
APB – Appellent's Brief
REB - Reply Brief
CAL - Cross-Reply Brief

Initial Entry:
DJN - Docket & Journal
TRP - Transcript of Proceedings
RCF - Record Filed
11B - Record Complete

TRIAL COURT CASE TYPE *(NECESSARY TO DISTINGUISH SUPREME COURT CASE TYPE F)*
DOM - Domestic Relations
PRO - Probate
JUV - Juvenile

ASSIGNMENT TYPES
OAJ - Oral Argument Judge
BAJ - Brief Author Judge

The following event types are used for the "Set Briefs Complete" Utility.

EVENT TYPES
SET - Set Oral Argument
OAR - Oral Argument
SUB - Submitted on briefs or Case to be Submitted

The Reports menu provides access to the Presiding Judge Report, Appellate Judge Report, and Create Envelope Merge File.   There is also a section for connecting to the MS-Access reporting tools.
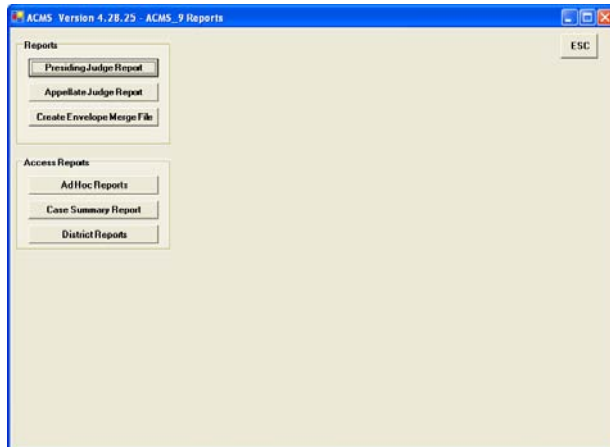
PRESIDING JUDGE REPORT

1. Enter report criteria for ending and beginning dates.
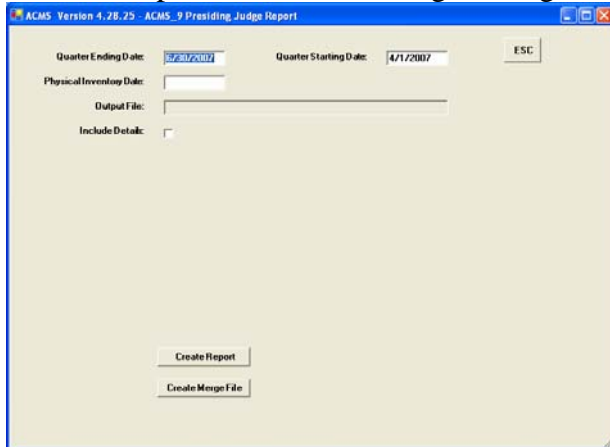
2. Physical inventory date displays on output.

3. If details are desired, select column (Supreme Court Case Type) and report line.
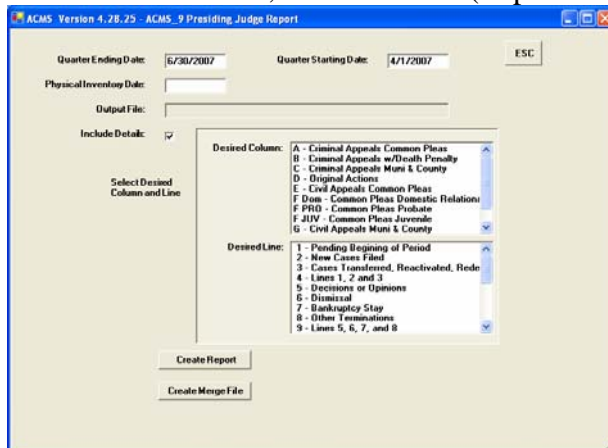
4. Click "**Create Report**" button.
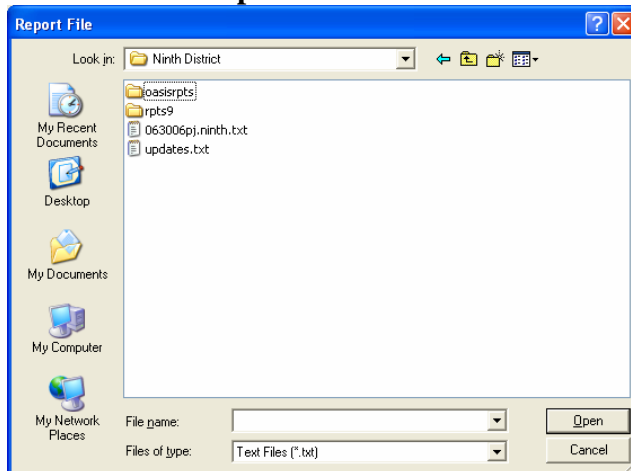
5. Enter desired location for output text file. Click "**Open**" button.
6. Application will return to entry screen when finished creating the report file.

APPELLATE JUDGE REPORT
1. Enter period ending, start dates as desired.
2. Select specific Judge abbreviation if desired. If blank, all judges will be listed on separate pages in output display.
3. Check "Details" box if case number details for summary totals are desired.

4. Click "**Create Report**" button.

5. Enter desired location for output text file. Click "**Open**" button.
6. Application will return to entry screen when finished creating the report file.

CREATE ENVELOPE MERGE FILE

   This function provides the ability to create a text file listing name/address information for a case's parties and attorneys. The resultant text file can be used as an input merge file for MS-Word envelope and/or document template files.

   1. From the **Reports** menu, choose "**Create Envelope Merge File".**
   2. **"Change" to the desired case**.
   3. Click "**Include Attorneys**", "**Include Parties**","**Only Active Parties**" as needed.
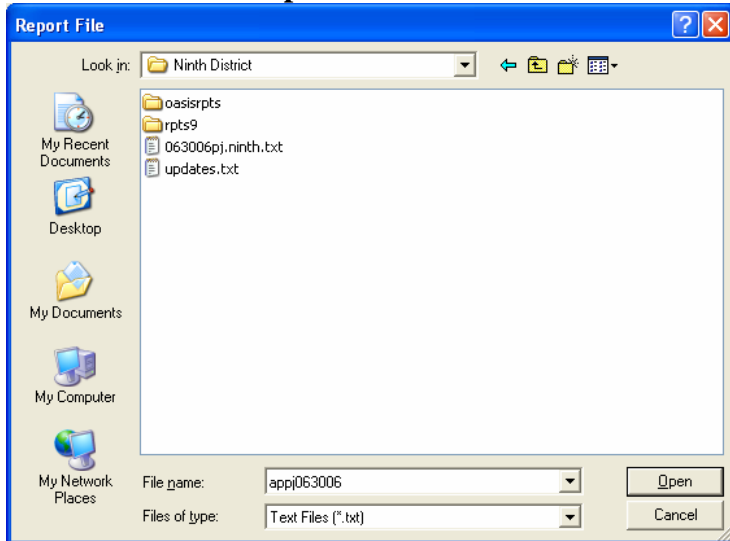

   4. Click "**Create Merge File**".
   5. Enter desired location for output text file. Click "**Open".**

   6. If data is to be concatenated to another file of case name/address data, use the "**Append to Existing Merge File"** button instead.

7. Application will acknowledge contents of merge data file with message box.
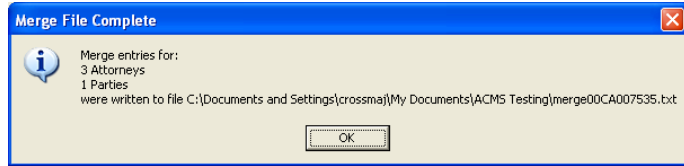
8. Use "**ESC"** to exit function.

Set Briefs Complete

SET BRIEFS COMPLETE FOR ONE CASE AT A TIME

In the Filing Type Maintenance form, when creating a filing type, put SET in the Associated Filing Type field. Then, whenever a filing is created with the indicated filing type, an Event type of SET will be created.

SET BRIEFS COMPLETE FOR MULTIPLE CASES

1. From the Main Form and Most other forms, click on Tools.
2. Click on "Set Briefs Complete."
3. Enter Due Date
4. Click either "Print Report" or "Update and Print Report".

Print Report:

The cases on the report will match the following criteria:
1. Non-archived
2. Briefs complete date is blank
3. Final order date is blank
4. Have a filing of the ALB type where the
    - Final order date is blank
    - Filing due date is less than today.

The fields that appear on the report will be:
1. County
2. Case
3. Due Date on ALB type filing record.

Update and Print Report:

The cases on the report will match the following criteria:
1. Non-archived
2. Briefs complete date is blank
3. Final order date is blank
4. Have a filing of the ALB type where the
   - Final order date is blank
   - Filing due date is less than today.

The fields that appear on the report will be:
1. County
2. Case
3. Due Date on ALB type filing record.

The program will create an event with the following information for each case on the report
1. County
2. Case Number
3. Filing Number
4. Event Date (due date value)
5. Event Type (SET)

ADD A NEW USER

1. From the main screen and most other forms, press the **"Tools"** Command Button.
2. Click the **"Users"** Command Button.
3. Click "New."

4. Enter the user's **last name.**
5. Enter the **user's logon.**
6. All other fields are optional.
7. Click on **Capabilities.**
8. All capabilities will default to "no." **Click on the desired capability** or **Copy** another user's capabilities into the current user.
9. Check **"Allow Access"** for read-only ability for the current selection.
10. Also check **"Allow Update"** for editing ability for the current selection.

11. Click **"Save."**

COPY A USER'S CAPABILITIES TO A NEW USER
1. From the main screen and most other forms, press the **"Tools"** Command Button.
2. Click the **"Users"** Command Button.
3. **Search for User** or enter new one.
4. Click on **Capabilities.**
5. Click **Copy.**
6. **Select the desired user** from which you wish to copy capabilities.

7. Make any **modifications.**
8. Click **"Save."**

UPDATING USER PREFERENCES
1. From the main screen and most other forms, press the "**Tools"** Command Button.
2. Click the "**Users"** Command Button.
3. Select the appropriate user via the **navigational buttons** or the "**Search"** button.

4. Click the "**Preferences"** Button.

5. Update as requested.

SEARCH FOR A USER

1. From the main screen and most other forms, press the **"Tools"** Command Button.
2. Click the **"Users"** Command Button.
3. Click **"Search."**
4. The users will appear in a list view – **click** on the desired user.

DELETING A USER

1. From the main screen and most other forms, press the **"Tools"** Command Button.
2. Click the **"Users"** Command Button.
3. **Search** for the User.
4. Once on desired user, click on **delete.**

5. **Confirm** deletion.

Trial Court Number

Note: basic case information must be entered before assignments, comments, consolidations, events, party, etc., can be entered.

ADD A NEW TRIAL COURT NUMBER
1. From the Main Menu or most other forms, click the **Trial# Command Button.**
2. The record that appears will be for the case currently active in the case maintenance form.
3. **"Change" to the desired case**.
4. Click **"New."**
5. Enter new **trial court number.**
6. Press **Save.**

One may also enter a trial court number in the appropriate field on page two of the case maintenance screen.

SEARCH FOR TRIAL COURT NUMBER
1. From the Main Menu or most other forms, click the **Trial# Command Button.**
2. The event that appears will be for the case currently active in the case maintenance form.
3. **"Change"** to the desired case.
4. Use the **navigation buttons** to scroll through the Trial Court Numbers for that case or click the **Search button** to see them in a list view.

DELETE A TRIAL COURT NUMBER
1. From the Main Menu or most other forms, click the **Trial# Command Button.**
2. The event that appears will be for the case currently active in the case maintenance form.
3. **"Change"** to the desired case.
4. **Search** for the desired trial court number.
5. Once on the desired Trial Court Number, press the **delete** command button.
6. **Confirm** deletion.

CONNECTIONS:

1. I just entered a filing and I want to connect it to another filing, but it does not appear in the list view.

    The display of existing connections reflects what has been saved in the database. A newly created connection must be saved to the database by clicking on the Save command button.

COPYING A CASE

1. I copied a case and told it to copy the filings as well, but the filing button doesn't show in all capitals, so I'm afraid the information isn't there.

    Until the copied case has been saved (to the database), the upper row of command buttons will not reflect (be displayed in upper case) the presence of Filing, Event, Party, etc., data as being in the database.

COMMENTS

1. I tried to search for comments by using the Search button and only 1 comment appeared.

    Search only shows the comments for the specified case. First switch to the desired case, then choose Search to see all the comments for it. If there are no comments for the active case, the Search button will be deactivated.

HOT KEYS

1. None of my hot keys are underlined! How do I know what they are?

    This is a Microsoft feature that comes standard with Windows XP. Go to your desktop and right-click. Open Properties and go to the Appearance tab. Press the Effects button. The last checkbox option says "Hid underlined navigation. . .. until I press the Alt button." Unclick that checkbox option, and all hot keys will be displayed.

CHANGING TO A NEW CASE

1. I entered an invalid case number. So now I'm trying to click on the binoculars but it just keeps telling me I have a bad case number.

    Delete the contents of the case number field, then click the binoculars.

"CHANGE" COMMAND BUTTON

1. My change command button disappeared!

    First, check to be sure that you are on a screen that has a change button – some don't. Hit the ESC key or button to back out a level. You'll probably have your change button there. If not, check the capabilities in the security settings.