



Journal
Technologies

eAttorney documentation

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Choose one of the following documentation sets:

User guide

Learn how to navigate, use, and work with eAttorney.

Administrator guide

Learn how to manage an eAttorney installation.

Business processes

Learn about eAttorney processes and workflows.

JDA documentation

Learn how to login and use JDA features.

1. User guide

Prerequisites

Preferred Browser: latest Chrome browser.

Supported Browsers: latest Chrome, Firefox, Safari, Edge browsers, or Internet Explorer 11+.

Navigation

- [Top navigation](#)
- [Left navigation](#)
- [Case navigation](#)
- [Person navigation](#)

Cases

Add, edit, and view cases.

See the [Cases](#) for help with cases.

Persons

Add, edit, and view person records.

See the [Person](#) for help with person records.

Dashboard

- [Dashboard](#)
- [Assignments gadget](#)
- [Calendar gadget](#)
- [Saved search gadget](#) and [Saved search results gadget](#).
- [Archived search gadget](#)
- [Recent reports gadget](#)

- [Date calculator gadget](#)
- [Directory search gadget](#)
- [Interest calculator](#)
- [News gadget](#)
- [Notepad gadget](#)

Documents

- [Documents](#)
- [Filing cabinet](#)
- [Document generation](#)
- [Document viewer](#)
- [Document scanning](#)

Financials

- [Financials](#)
- [Cash receipts](#)
- [Payment plans](#)
- [Bail](#)
- [Restitution](#)

Reports

- [Case reports](#)
- [Person reports](#)
- [Financial reports](#)

Searches

- [Top navigation search bar](#)
- [Search controls](#)
- [Search case](#)
- [Search person/business](#)

- [Search justice personnel](#)
- [Search justice personnel caseload](#)
- [Search scheduled event](#)
- [VOCA report](#)

What is eAttorney?

A web-based Case and Matter Management System with integrated document management.

Features

eAttorney includes the following features:

Case management

- **Supports Civil and Criminal Case Types.**
- **Basic Investigation Task Assignments.**
- **CoDefendant or Joined defendant and plaintiff tracking** if codefendants or coplaintiffs are present in a single case filing.
- **Conflict Checking** of parties, witnesses and codefendants for prior case involvements, status of defendants as a witness in a pending case, and prior representation of prosecution witnesses by the public defender or defense counsel. Also, conflict checking of judge, defendant, defense counsel, and assigned prosecutor for personal or professional relationships that would create a conflict situation.
- **Discovery:**
 - Get and disclose case-related documents, email, files or police reports, scan and assign to a case, notify a discovery clerk or investigator of the information received, and in-person, email, or public portal disclosure of electronic or physical discovery files to a defendant or their attorney.
 - Track disclosure of all items, with dates of disclosure, so undiscovered/undisclosed items can be easily identified.
- **Asset Forfeiture:** Property seized due to arrests or investigations can be recorded, including serial numbers, descriptions, and estimated or assessed values. Dispositions of forfeited property can be tracked through property sales records which can record bids and final sale amounts.
- **Evidence and Exhibits:** Can be added to cases and a chain of custody can be established by tracking dates, times, locations and custodians in possessions of the evidence. Images of evidence can be attached.

- **Subpoena generation process:** System can generate physical subpoenas and victim/interested party notification letters for event dates for a case, and as a “batched” job of subpoenas for multiple cases.
- **Witness Planning Sheet:** Provides a subpoena planning tool to direct the types of subpoenas to be generated and the type of involved names to be subpoenaed for each type of judicial event.
- **Brief Bank for motions files and legal analysis of issues:** Prosecutor-created associated keywords that enable topical organization to documents so that the research can be performed now and located at a later date when similar issues arise.

Document management

- Native access to all your documents in the system.
- Document repository input supported using drag and drop and file upload.
- Document generation uses JDA4 (Journal Document Automation), an example of proprietary technology in eAttorney.
- Supports document editing features including signatures, stamping, redaction, annotations, and bookmarks.
- Provides full text searches.
- Microsoft Outlook Add-in facilitates direct association of emails and attachments to case.
- Microsoft Word Add-in enables downloading, editing and uploading of Word files directly to and from the system.

Administration

- Users with appropriate security privileges can:
 - Manage document templates.
 - Write custom searches.
 - Add and manage other users in the system.

Access eAttorney

eAttorney is a web app that is securely managed by Journal Technologies in the AWS GovCloud. The web app can be accessed from computers (PC or Mac), smartphones (iPhone, Android) and mobile devices (such as iPad, Galaxy, Surface). Users only need a web browser to securely access the system.

Log in

Your administrator provides a link to eAttorney and a set of user credentials to login with.



1. Enter your username and password into the appropriate fields.
2. Click [**Log In**] to log in to eAttorney.
3. You may tick the **Stay Logged In** checkbox to stay logged in across browser sessions.
4. If you forget your password, click [**I forgot my password**]. You may be prompted to answer a security question. You should then get an email with further steps to finish resetting your password.

Log out



To logout, click the logout icon  in the top navigation bar.

Navigation

Top navigation

The **Top Navigation** bar shows at the top of the screen. It identifies the product and

includes buttons for common actions.



The top navigation bar has the same appearance for all users, regardless of account permissions.

Left side

The left side of the navigation bar should resemble the following screenshot:

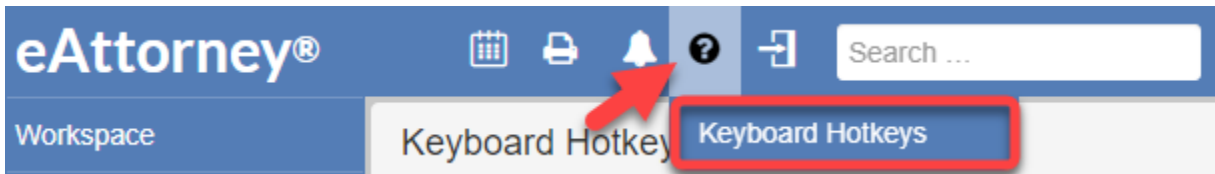


Available actions and short descriptions:

Item	Action
Dashboard	Click to show the Dashboard .
Print icon	Click to open a dialog to print the current page.
Bell Icon	Click to check your notifications.
Question Icon	Click to show help documentation.
Door Exit Icon	Click to log out.
Top navigation search bar	Click to search all entities and resources.

Hot keys

The keyboard hot keys are accessed in the top navigation by clicking the [**Help**] button and then selecting **Keyboard Hotkeys**.



Custom hotkeys

No custom hot keys are defined.

General hotkeys

Windows	Mac	Options
Ctrl + H	⌘ + H	Show the Dashboard home screen.
Ctrl + S	⌘ + S	Focus the top-bar search.
Ctrl + F11 Ctrl + ⬆ + Space	⌘ + F11 ⌘ + ⬆ + Space	Opens the global search popup for menu items.

Screens hotkeys

Windows	Mac	Description
Ctrl + ↵	⌘ + ↵	Submit the current form.
=	=	Enters the current date into a date field.
+	+	Add 1 day in a date field.
-	-	Subtract one day in a date field.
Ctrl + ⬆ + ⬆	⌘ + ⬆ + ⬆	Navigate to the first item in the case header menu.
Ctrl + ⬆ + ⬇	⌘ + ⬆ + ⬇	Navigate to the first item in the bottom toolbar.
Ctrl + ← Ctrl + ,	⌘ + ,	Navigate to the previous stage (in wizards).
Ctrl + → Ctrl + .	⌘ + .	Navigate to the next stage (in wizards).
Alt + ⌘	⌥ + ⌘	Collapse or expand folder view panels.
Ctrl + I	⌘ + I	In form search fields, add a new item form.
Ctrl + Space	⌘ + Space	In form search fields, open the magnifying glass search form.

Panels hotkeys

Windows	Mac	Description
Ctrl + ↑	⌘ + ↑	Navigate to the panel preceding the current panel. Loops around.
Ctrl + ↓	⌘ + ↓	Navigate to the panel following the current panel. Loops around.
⇧ + Delete	⇧ + Delete	Clear the entered information in the current panel.
Ctrl + Insert	⌘ + Insert	Add a panel.
Ctrl + Delete Ctrl + Backspace	⌘ + Delete ⌘ + Backspace	Remove the current panel.
Ctrl + /	⌘ + /	Navigate to the previous panel.
Ctrl + '	⌘ + '	Navigate to the next panel.

Mass insert screens hotkeys

Windows	Mac	Description
Ctrl + ⇧ + ↓	⌘ + ⇧ + ↓	Navigate to the submit button of the bulk lookup.
Ctrl + Insert	⌘ + Insert	Opens up bulk lookup.

Cash receipts hotkeys

Windows	Mac	Description
Ctrl + ← Ctrl + ,	⌘ + ,	Navigate to the previous stage (in wizards).
Ctrl + → Ctrl + .	⌘ + .	Navigate to the next stage (in wizards).
Ctrl + ⇧ + ↓ Ctrl + ⇧ + ↵	⌘ + ⇧ + ↓ ⌘ + ⇧ + ↵	Navigate to the Submit & Pay Fee option.

Minutes hotkeys

Windows	Mac	Description
Ctrl + ↑ + ↓ Ctrl + ↑ + ↶	⌘ + ↑ + ↓ ⌘ + ↑ + ↶	Navigate to the Submit & Pay Fee option.
Ctrl + ↑ + >		Commit and print minutes.
Ctrl + ↑ + ' (apostrophe)		Switch to another case, in multi case minutes.
Alt + ↑		Move up one line.
Alt + ↓		Move down one line.
Escape		Move to the Command text area.

System administration hotkeys

Windows	Mac	Description
Ctrl + F12		On the entities screen, open a global search popup for entities, fields, or lookup lists.
Alt + 0 (zero)	⌘ + 0 (zero)	Opens the form editor.

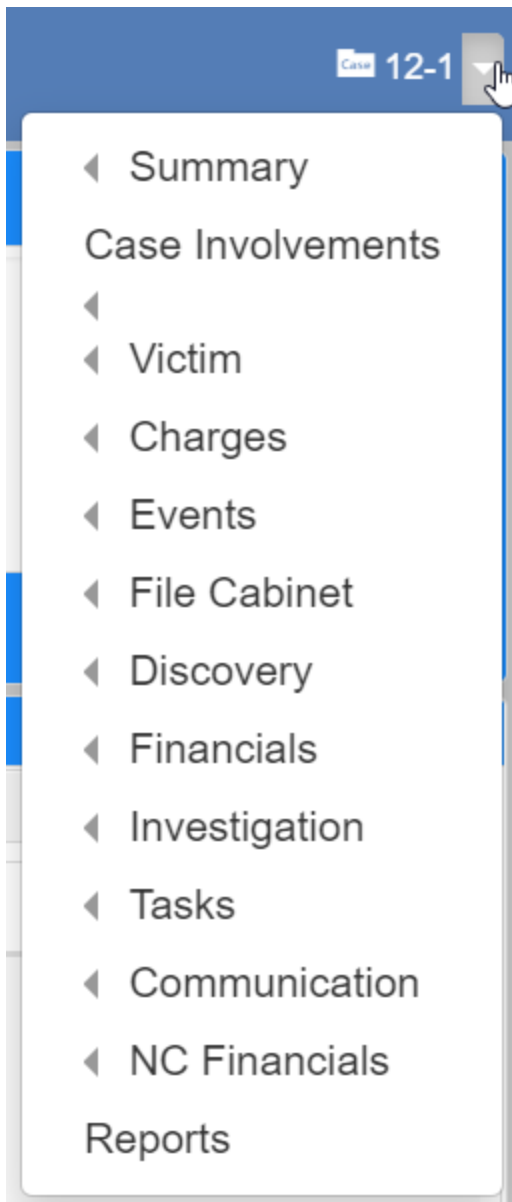
Right side

At the far right of the Navigation bar there are some quick links for Recent Case navigation.

Click the Caseld Folder icon to take you to the most recent Case you accessed:



More quick-access Case actions can be taken from the dropdown arrow:



The top Navigation bar is the same visually for all users, regardless of account permissions.

Left navigation

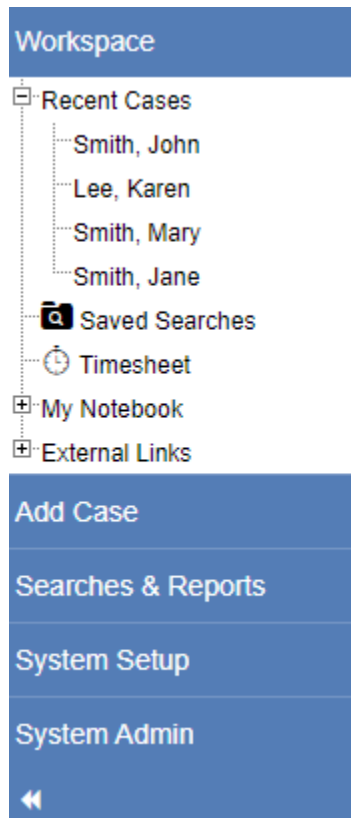
Different Security Groups affect what the user sees in the left navigation pane. For more information, see [User navigation](#).



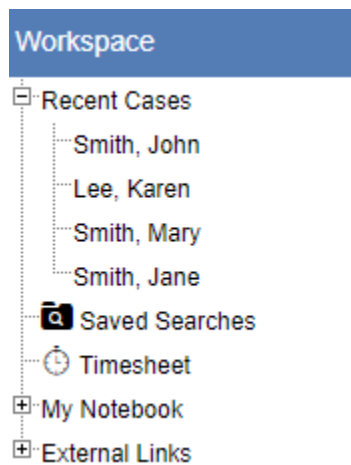
Click a link for more information about the item.

Sections

Here is the complete left navigation section with all possible routes:



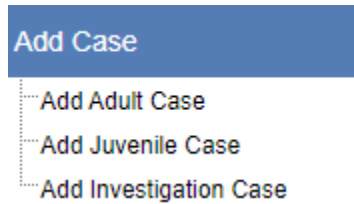
Workspace



- [Recent Cases](#) - Links to a few of your recent cases for quick click-through to the case view.
- [Saved search gadget](#) - Review, run or edit your saved searches.

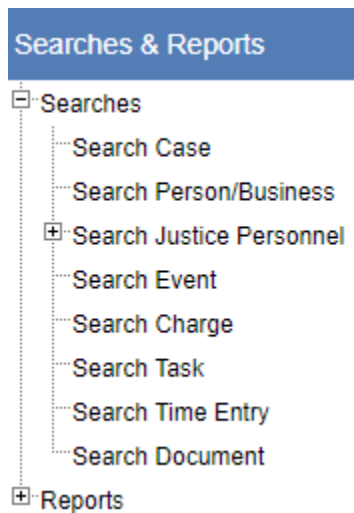
- **My Notebook** - Manage your notes and Shared Notes.
 - **Note Snippets / Macros** - Text Snippets for fast data entry or writing prompts.

Add case



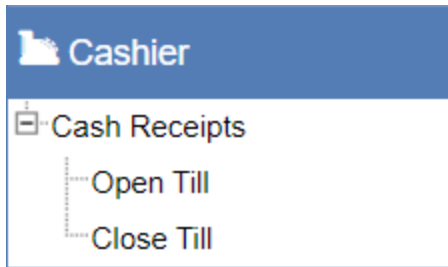
- Add Adult Case - Go to the case creation screen. See [Create a case](#).

Searches and reports



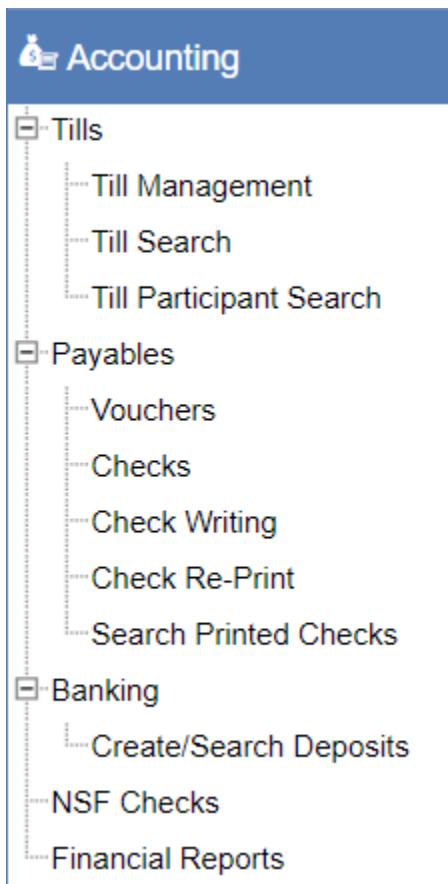
- [Search case](#) - Search for cases.
- [Search person/business](#) - Search for a Person or Business.
- [Search justice personnel](#) - Search for Justice Personnel.
 - [Search justice personnel caseload](#) - Search for Justice Personnel Caseload.
- [Search scheduled event](#) - Search for Scheduled Events.
- [VOCA report](#) - Search VOCA data.

Cashier



- [Cash receipts](#):
 - [Opening a till](#) - Open a Till for this financial user.
 - [Cash receipts](#) - Close the currently open Till for this financial user.

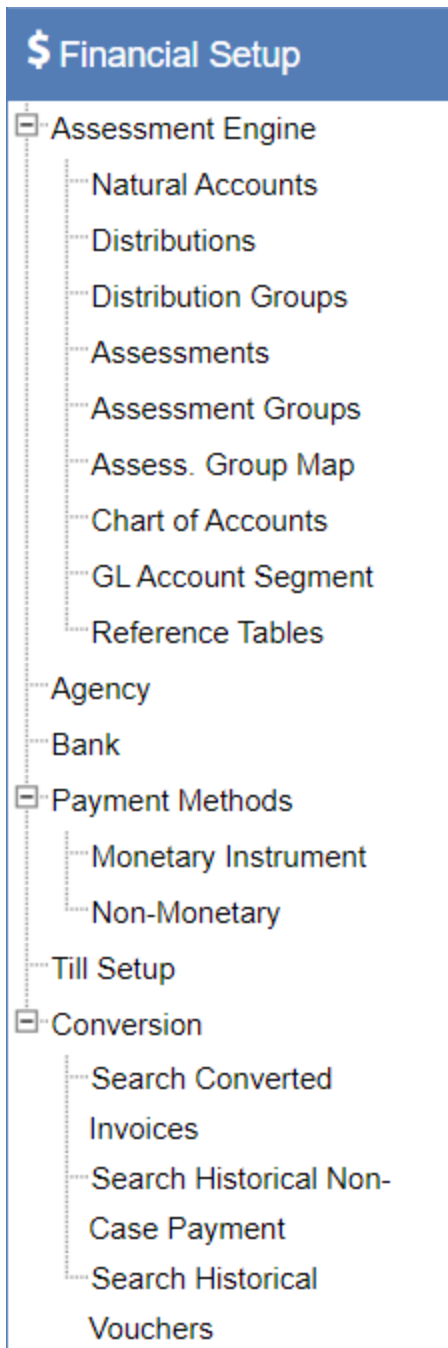
Accounting



- [Tills](#):
 - [Till Management](#) - Search / manage Tills.
 - [Till Search](#) - Search and view existing Tills.
 - [Till Participant Search](#) - Search Users with Tills.

- Payables:
 - Vouchers - Search Vouchers and Payables.
 - Checks - Search Vouchers / Search Checks.
 - Check Writing - Search for Money Available to write a Check.
 - Check RePrint - Reprint Checks.
 - Search Printed Checks - Search printed checks.
- Banking:
 - Create / Search Deposits - Create or Search for existing Deposits.
- NSF Checks - Search NSF Checks.
- Financial Reports - Various SSRS Financial Reports.

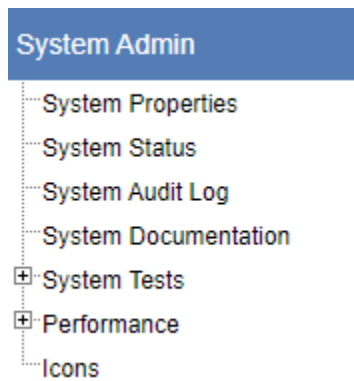
Financial setup



- Assessment Engine:
 - Natural Accounts - Search / Create Natural Accounts.
 - Distributions - Search / Create Distributions.
 - Distribution Groups - Search / Create Distribution Groups.
 - Assessments - Search / Add Assessment Items.
 - Assessment Groups - Search / Add Assessment Groups.

- Assessment Group Map - Manage Assessment Group Mappings.
- Chart of Accounts - Search / Add Case Jurisdiction to Natural Account Connections.
- GL Account Segment - Add GL Account Segment Items.
- Reference Tables - Create financial reference tables.
- Agency - Agency Accounts.
- Bank - Manage Bank Accounts.
- Payment Methods:
 - Monetary Instrument - Manage monetary payment types (Cash, Credit, Debit).
 - Non monetary - Manage non monetary payment types.
- Till Setup - Create Till Groups, Assign Participants, Add Till Definitions, Add Till Stations.
- Conversion:
 - Search Converted Invoices - Search Staging Invoices from the data conversion.
 - Search Historical NonCase Payment - Search NonCase Payments from the data conversion.
 - Search Historical Vouchers - Search Vouchers from the data conversion.

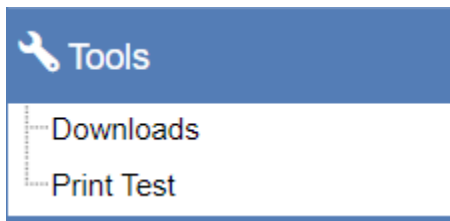
System administration



- Security - Manage [User accounts](#) and [Security groups](#).
- [Lookup lists](#) - Manage Lookup Lists.
- [Document definitions](#) - Manage Document Definitions.
- Directory:
 - People - Manage Directory Persons.
 - Organizations - Manage Directory Organizations (Collection of People).
- [Statutes](#) - Takes you to the full statute search.

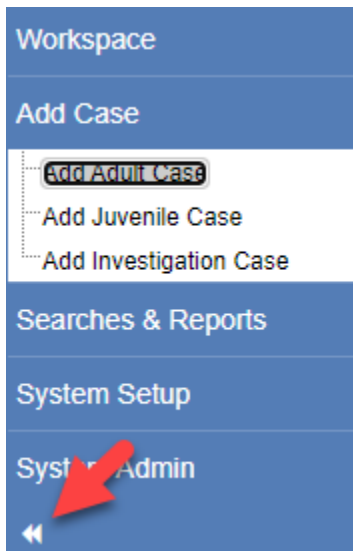
- Search Statute Text - Search for statute text.
- [News gadget configuration](#) - Manage content for the News Gadget on the Dashboard.
- [Managing special statuses](#) - Manage Case and Person Special Statuses.
- [Calendar administration](#) - Manage Holidays and Test Calendar Sync.
 - Holiday Calendar - Manage Agency Holidays.
 - Calendar Sync Test - Test Calendar Sync with Google or Exchange.

Tools



- Downloads - Download tools and Add-Ins.
- [Print test](#) - Test the printing service.

Double arrow



Hide the Left Navigation Bar for greater screen size.

Case navigation

A **Case Navigation** screen:

1. [A header.](#)

2. Navigation buttons.
3. The case folder view.

The screenshot shows a case summary page for 'Felony ~ 22-1'. At the top, a red banner indicates 'High Profile'. Below this, the case name 'Felony ~ 22-1' is displayed with a folder icon and a callout '1'. The defendant's name 'John Smith' is shown with a callout '2'. A navigation bar contains various tabs like 'Case Involvements', 'Victim', 'Charges', etc., with a callout '3' on the 'Tasks' tab. The main content area is divided into sections: 'Defendant', 'Other Case Involvements', 'Justice Personnel', 'Case Numbers', and 'Case Special Statuses'. Each section contains a table with details about the individuals involved and their roles.

Type	Person	Contact Information
Defendant	Smith, John	1234 Brooklyn Street, New York, NY 10001 [Residence] (123) 456-7890 [Cell] jsmith@example.com [Email Personal]
Witness	Smith, Jane	
Victim	Smith, Mary	1234 Brooklyn Street, New York, NY 10001 [Residence] (456) 789-1011 [Cell] msmith@example.com [Email Personal]

Role	Person	Status
Attorney	Mayfield, Jacob	Current
Defense Representative	Robinson, Cindy	Current

Type	Number	Agency
Law Enforcement Number	22-51122	County Superior Court





Status	Date	Memo
High Profile	06/23/2022	

Header

The **Case Header** shows a lot of information and allows you to make quick updates to the case.

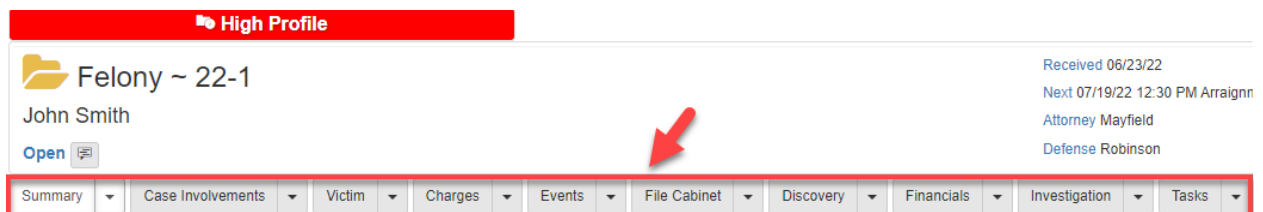
The screenshot shows the case header for 'Felony ~ 22-1'. A red banner at the top indicates 'High Profile' with callout '1'. The case name 'Felony ~ 22-1' is shown with a folder icon and callout '2'. The defendant's name 'John Smith' is displayed with callout '3'. An 'Open' button is visible with callout '4'. On the right side, there is a 'Received' date '06/23/22' with callout '6', a 'Next' date and time '06/30/22 3:55 PM Preliminary Hearing in Courtroom 1' with callout '5', and the names of the attorney 'Mayfield' and defense representative 'Robinson'.

1. The **Special Status Banner** shows if there is a special status on the case being viewed.
2. The **Financials Banner** shows if there is a balance on the case.

3. The **Charge** and **Case Number**.
4. The **Case Name**.
5. The **Case status** linked to the **Update** form and [sharebook](#) button.
6. **Event and Attorney** information:
 - a. **Received**: the date the case entered the system.
 - b. **Next**: the next scheduled event date.
 - c. **Attorney**: assigned Prosecuting Attorney.
 - d. **Defense**: defense attorney assigned.
7. Widgets:
 -  The **Send Email** widget: opens an [email popup](#).
 -  The **Case Watch** widget: adds this case to your watched cases list.
 -  The **Joined Case** widget: opens a [popup](#) that shows joined case information.
 -  The **Case Note** widget: opens a [popup window](#) that allows quick adding of notes to the case.

Navigation buttons

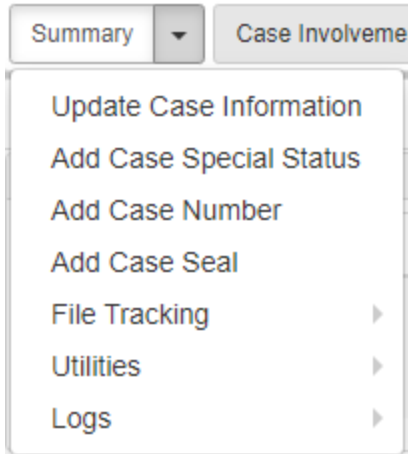
Under the header is a row of buttons. Each button, when clicked, changes the data shown in the page [Case Folder View](#). Most of the buttons have a dropdown beside it. The dropdown has a list of options to add or update data on the case.



Add or update dropdown menus

The caret symbol next to each navigation button, when clicked, shows a dropdown of available actions for the relevant subset of data. Click an option to navigate you to the associated **Add Form** or **Update Form**.

Case summary





The **Summary** dropdown has options to update case information, add a special status or case number, or join cases.

- Select **Update Case Information** to update the received date of the case, the case type, the case status, and the status date.


NOTE

All fields on this form are required for submission.

- Select **Add Case Special Status** to add a special status to a case. The form has only two required fields, **Status** and **Start Date**. The other included, optional fields are **Category**, **Value**, and **End Date**. The **Category** and **Status** fields are dropdowns, so they show their available options when clicked.


Add Case Special Status  




▼

Start Date* 



Status*

Memo

End Date 

 Save & Back  Save & Add Another  Back



- Select **Add Case Number** to add case numbers from other agencies, like courts or defense. These alternate case numbers facilitate case data sharing.

Add Case Number  




▼

Type*

Number*

Agency  

Memo

 Save & Back  Save & Add Another  Back

- Select **Join Case** to manage **Case Joinders**. This form has two panels showing **View** and **Add** forms.

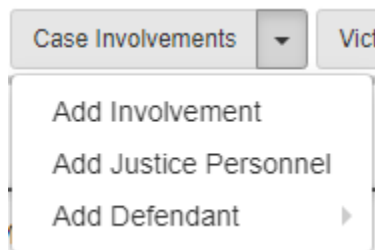
▼ Related Cases (2)

Related	Joinder Type	Cases	Begin / End	Notes
Entered on 06/24/22	Related Case	1. 22-1: Smith, John   2. 20-3: Lee, Karen		
Entered on 06/24/22	Related Case	1. 22-1: Smith, John   2. 20-3: Lee, Karen		
Entered on 06/24/22	Related Case	1. 22-1: Smith, John   2. 20-3: Lee, Karen		
Entered on 06/29/22	Related Case	1. 22-1: Smith, John   2. 20-2: Lee, Karen		
Entered on 06/29/22	Related Case	1. 22-1: Smith, John   2. 20-2: Lee, Karen		
Entered on 06/29/22	Related Case	1. 22-1: Smith, John   2. 20-2: Lee, Karen		



 Lead  Current Case

- The **Case Joinders** panel shows **Joinders** associated with the case. A red icon shows next to the **Joinder** main case and a blue icon shows beside the current case.
- Click a **Joinder** link to edit the **Joinder** fields, **Name**, **Joinder Type**, **Description**, and **Purpose**.
- The **Add Case Joinder** panel creates a new **Case Joinder** associated with the selected case.
- Click **[Add Case]** to open a **Search case** popup.

Case involvement [<https://documentation.journaltech.com/eAttorney/user/cases/involvements.html>]




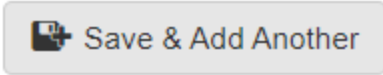
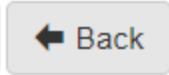
- Select **Add Involvement** to add an existing/new person and involvement type, including **Complainant**, **Witness**, or **Victim**, to the selected case.

Add Involvement  



▼

Involvement Type* ▼

Person* + 🔍 ✕

- Select **Add Justice Personnel** to add the case to the **My Recent Cases** gadget for the corresponding justice personnel.

Add Justice Personnel  

▼


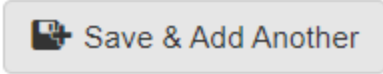
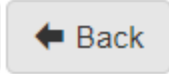
Role* ▼

Person* + 🔍 ✕



Associated Organization 🔍




Date Assigned* 📅


Status* ▼




  

- Select **Add Defendant** to create a subcase and a party to the case. The subcase is added to aid financials.



Add Defendant  


Person*   

Custody Status* 


 Save & Back  Save & Add Another  Back


- Select **Add Bail** to add **Bail** information and conditions for the selected case involvement.


Add Bail  Add to basdf [DEF] 


Bail Type 


Bail Amount


Status 

Status Date 

 Bail Condition(s)



Condition Type 


Begin Date 

End Date 

Notes

Victim and VOCA reporting

Victim  Charges 

VOCA Reporting 

- Select **Add Victimization** to add a victimization type to a victim. Adding a victimization type requires a victim in **Case Involvements**.

Add Victimization ▼ ↺ ✎

Victimization Type*

Date Reported* 📅

📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Special Classification** to add a special classification for a victim. The special classifications are used in VOCA reports.

Add Special Classification ▼

Classification Type*

Date Reported* 📅

📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Service** to record a service provided to a victim. The services show in VOCA reports.

Add Special Classification ▼

Classification Type*

Date Reported* 📅

📄 Save & Back 📄 Save & Add Another ⬅ Back

Charges

Charges ▾ Events ▾ Fi

- Add Charge
- Charging ▸
- Add Plea Offer
- Dispose Charges
- Add Sentencing ▸
- Relate Victims to Charges

- Select **Add Charges** to add charge information to the involvement.

Add Charge Add to Smith, John [DEF] ▾ ↕

Count Number*

of Counts

Offense Date*

Statute*

Keywords No Keywords

Stage Added* Referred by Law Enforcement ▾

Inchoate Type ▾

Victim(s)

Mary Smith [Victim]

Enhancement ⊖ ⊕

Statute

Keywords No Keywords

⊕ Enhancement


📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Plea Offer** to add plea offer information to the involvement.

Add Special Classification Add to Smith, Mary [VIC] ▼

▼

Classification Type*

Date Reported* 

Save & Back Save & Add Another Back

- Select **Add Charge Characteristic** to add a **Case** charge characteristic, like **Misdemeanor** or **Felony**.

Add Charge Characteristic ? Add to I [Case Name] / Count 7 NRS 453.566 UNLAWFUL USE OR POSSE ▼

▼

Characteristic*

Type

Value

- Select **Add Charge Intoxicant** to add an intoxicant to the selected individual.

Add Charge Intoxicant ? Add to I [Case Name] / Count 7 NRS 453.566 UNLAWFUL USE OR POSSE ▼

▼

Intoxicant

Level

Notes

- Select **Add Exhibit** to document and track history.

Add Exhibit

Exhibit Type*

Description

Exhibit Number

Date Received 12/03/2020

Status

Status Date 12/03/2020

Notes

Exhibit Tracking

Date Entered 12/03/2020

Entered By admin

Status

Status Date 12/03/2020

Notes

Enter the location of the exhibit (Location or Directory Person)

Location

Directory Person

Save & Back Save & Add Another Back

- Select **Dispose Charges** to dispose charges. Select the **Plea** and **Disposition Type** for each charge to dispose.

Dispose Charges

Bernardo, Loviatar [CIT30]

Charge	Plea	Plea Date	Disposition Type	Disposition Date
Count 1 NRS 484.379(2)(a), (2)(b) and/or (3), NRS 484.3792(1)(b), and DCC 10.04.030 DRIVING OR BEING IN ACTUAL PH... - Dismissed	Not Guilty		Dismissed	06/12/2012
Count 2 NRS 484C.110(1)(a), (1)(b) and/or (1)(c), and NRS 484C.400(1)(c) DRIVING OR BEING IN ACTUAL PH... - Found Guilty as Charged	Not Guilty		Found Guilty as Charged	06/12/2012
Count 3 NRS 205.274(1), NRS 193.155(2) INJURING OR TAMPERING WITH VE...				
Count 4 NRS 454.351 POSSESSION OF A DRUG WHICH MA...				

Save & Back Back

- Select **Sentencing** to add a sentence to a charge, organized by count.

Laertes, Moradin [CIT01]

Count 1 NRS 453.411 UNLAWFUL USE OF A CONTROLLED ... - Diversion

Sentence

Sentence Type* Length

Unit Sentence Begin Date

Sentence Location Amount \$

Reduced To \$ Notes

Unit

Credit

Amount Suspended \$ Credit Length

Unit

Suspend

Amount Suspended \$ Suspend Length

Unit

Condition

Condition Type* Length

Length Unit Begin Date

Condition Location Amount \$

Status Notes

Condition

Sentence



Events

Events File Cabinet



Add Event



Subpoenas

- Select **Add Event** to add a scheduled event, like a hearing, conference, or meeting, with related **Involvements** or **Case Personnel**.

Add Event  











Type*

Event Location  

Start Date Time*  

▼ Note

Title



Paragraph ▼
System Font ▼












Note Macros

▼ Related Justice Personnel

Cindy Robinson [Defense Representative]
 Jacob Mayfield [Attorney]

▼ Related Involvements

Jane Smith [Witness]
 John Smith [Defendant]
 Mary Smith [Victim]

 Save & Back
 Save & Add Another
 Back



File cabinet

File Cabinet ▼ Relatic

Add Person File(s)




Document Viewer

- Select **Add Case File(s)** to add files for the **Case** by uploading or choosing to [scan](#). Notes can be added to the file at the same time.

Add Case File(s)  













Type*

Select File(s)

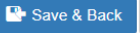
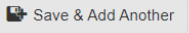

 Add files  Cancel  Delete

▼ Note

Title



Paragraph ▼ System Font ▼











Note Macros

 Save & Back
 Save & Add Another
 Back



- Select **Generate template** to [generate a document from a template](#).

Generate Form

Form

▼ COMPLAINT - Complaint

No Required Fields

 Add  Preview

8715
Complaint
MichaelTestDefintion
Subpoena - General
Test

- Select **Utilities** to access these utilities:
 - Select **Bates Stamp** to apply a stamp to a document.
 - Select **Merge Documents** to merge documents in the **Filing Cabinet** into a single PDF.
- Select **Doc Viewer** to use the [Document viewer](#) to show a **Case** document, annotate it, and apply stamps.

Discovery

Discovery ▼ Financials

Add Discovery Packet

Portal Invitations


- Select **Add Discovery Packet** to add documents to a packet that can be shared for some time. Learn more about [Discovery Packets](#) and how to [create](#) them.


Add Discovery Packet  

NOTE: Discovery Packets are created in the background and could take up to 15 minutes to be available in the Filing Cabinet.

Discovery Item

Packet Name*



Effective From* 06/24/2022 

Effective To 


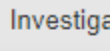
Available on Portal Yes


Notes

Documents

 Save & Back  Save & Add Another  Back

Financials


Financials  




- Cash Receipts
- Add Restitution
- Time & Expense 

- Select **Cash Receipts** to manage the **Case Cash Receipts**.
- Select **Case Ledger** to review the **Case Ledger**.

Add Special Classification

Classification Type*

Date Reported* 

 Save & Back  Save & Add Another  Back

Investigation

Investigation ▾ Tasks ▾

Add Investigation Request

- Select **Add Investigative Request** to add an investigative request to the **Case**.

Add Investigation Request ↺ ✎

Request Details

Request Details*

Due Date* 📅

Task

Type* ▾

Note

+ Task

Save & Back Save & Add Another Back



Tasks

Tasks ▾


Add Task



Add Checklist




- Select **Add Case Task** to add a task to the **Case**. Case tasks show in the manual work queue for individuals added to the **Assign To** field.

Add Task  


Instructions*

Due Date 

Assign To*  

 Save & Back  Save & Add Another  Back

Communication

Communication  NC F

Add Communication

- Select **Add Communication** to document and store communication between case involvements.

Add Communication ?

Type*

Date

Communication

Related Justice Personnel

- [Deputy]
- [Nevada State Deputy Public Defender]
- [Deputy]
- [Judge]

Related Involvements

- The Silver Flame Marcellus [Executive Legal Assistant]
- Loviatar Bernardo [Juvenile Defendant]
- Skerrit Reynaldo [Mother]
- The Fury Malcolm [Father]
- Skerrit Reynaldo [Victim]
- Onatar First Witch [Petitioner]
- Olidammara Second Witch [Guardian]
- basdf [Defendant]
- The Mockery Macbeth [Co-Defendant]

[+ Related Involvements](#)

Non-collectible financials

NC Financials

Add Non Collectible Financial

- Select **Add Non-collectible Financial** to document non-collectible financials not collected by this institution.

Add Non Collectible Financial ?

Type

Date

12/03/2020 📅

Alleged Amount

Ordered Amount

Status

Title

Ce Non Collectible Financial I

12pt
📄
B
I
U
🔗
A
🖋️
☰
☰

🔗
📄
↔
🔄

Add Note Icon

📄 Save & Back

📄 Save & Add Another

← Back

Case folder

Tab	Description
Case summary	<p>The Case Folder shows:</p> <ul style="list-style-type: none"> Case involvements and involvement type. Other case numbers attached to the case. Justice personnel with their corresponding role in the case. The Case status and another special status.
Case involvements	Use the Case Involvement Folder View to show case information about involvements, justice personnel, and bail, and to add or edit notes for individuals on the case.
Victim	Use the Victim Folder View to edit Case victims, special victim classifications, and services provided to victims.

Tab	Description
Charges	Use the Charge Folder View to show Case charges of involvements, charge characteristics, sentencing, exhibits, and inactive charges, and to edit exhibits and charges.
Events	Use the Event Folder View to show and edit Case events, date/time, category, related personnel, notes, and type.
File cabinet	Use the File Cabinet Folder View to show Case documents.
Discovery	Use the Discovery Folder View to show Case discovery items.
Financials	Click [Financials] to show the Case Ledger , which shows recorded Case financial interactions.
Investigation	Use the Investigation Task Folder View to show and edit the Case collection tasks.
Tasks	Use the Case Tasks Folder View to show Case tasks.
Communication	Use the Communication Folder View to show and edit Case communications.
Non-collectible financials	Use the Non-collectible Financials Folder View to show and edit the Case collections of non-collectibles.
Reports	Use the Report Folder View to show the Case Summary report by default. Other reports can be selected in the dropdown.

Send email widget

Send Email
✕

To*

Subject*

Message*

Include Link to Case

Close
Send Email

Use the **Send Email** widget to send an email regarding the **Case**. Select **Include Link to Case** to include a link to the case in the email.

Joined case widget

Joined Cases for 22-76: Wade, Addison ×


	Joinder Type
Lead Case <ul style="list-style-type: none">• 22-76: Wade, Addison	☑ Juvenile
Related Cases <ul style="list-style-type: none">• 22-87: RIVERS, PHILLIP TEST Sr.	
Lead Case <ul style="list-style-type: none">• 22-76: Wade, Addison	☑ Juvenile
Related Cases <ul style="list-style-type: none">• 22-87: RIVERS, PHILLIP TEST Sr.	



Results 1-2 of 2

Use the **Joined Case** widget to show cases related to the current case. Click the **Case** number or title to show the lead or related cases.


Case note widget

Note for 22-1: Smith, John ×



Search... ▼  [+ Add Note](#) 

Scheduled Event Note

 06/22/22 10:00 AM Sentencing Hearing in Courtroom 1

This is a sentence hearing note.

06/24/22 by kwinward

Use the **Case Note** widget to search, print, edit, or add a **Case** note. The widget shows a paged list of notes added to a **Case**. The search returns a list of notes where the note title or body has the keywords. Click a note to edit it.

Sharebook widget

Dec 3, 2020

#1 Admin 11:22 PM

Informal Notes will go here.

#2 Admin 11:22 PM

#3 Admin 11:22 PM

#4 Admin 11:22 PM

#5 Admin 11:23 PM

This is for quick communication.

#6 Admin 11:23 PM

Only the date and sender are saved.

Send

6:55 AM


Use the **Sharebook** widget to add informal notes to the case. An informal note only includes the note text, the creation date, and the author.

Person navigation


Like the [Case View](https://documentation.journaltech.com/eAttorney/user/navigation/case.html) [https://documentation.journaltech.com/eAttorney/user/navigation/case.html], the **Person View** shows a header and a body. Use this screen to show and change all **Person** information, including involvements, contact information, and documents.

Header

The **Person Header** shows an image of the person, *if available*, plus their name, date of birth, gender, weight, ethnicity, and hair color.



The Person Header for John Smith displays a blue person icon, the name "John Smith", and a list of personal attributes: Date Of Birth 06/5/90, Eye Color Brown, Hair Color Brown, Primary Language English, Ethnicity White, Gender Male, Height 6, and Weight 200. Below the header is a navigation bar with buttons for Summary, Case Involvements, File Cabinet, Relationships, and Notes, each with a dropdown arrow.

	John Smith	Date Of Birth 06/5/90	Ethnicity White
		Eye Color Brown	Gender Male
		Hair Color Brown	Height 6
		Primary Language English	Weight 200

Summary Case Involvements File Cabinet Relationships Notes



Summary

Click [**Summary**] to show the **Person Folder View**. The form shows all information associated to the selected **Person**, including links to edit the information. Refer to [Person](#) for more information.

Person Summary					
<div style="display: flex; justify-content: space-between; align-items: center;"> Person Summary ↕ ✎ </div>					
<div style="background-color: #f0f0f0; padding: 2px;"> Name </div>					
First Name	Last Name	Middle Name	Status		
John	Smith		Active		
<div style="background-color: #f0f0f0; padding: 2px;"> Address </div>					
Address Type	Address	City	State	Zip	Status
Residence	1234 Brooklyn Street	New York	New York	10001	Active
<div style="background-color: #f0f0f0; padding: 2px;"> Telephone </div>					
Telephone Type	Telephone Number	Status			
Cell	(123) 456-7890	Active			
<div style="background-color: #f0f0f0; padding: 2px;"> Contact </div>					
Contact Type	Contact	Status			
Email Personal	jsmith@example.com	Active			
<div style="background-color: #f0f0f0; padding: 2px;"> Identification </div>					
Identification Type	Identification Number				
DL # (New York)	123-456-789				

Update person

Click and change fields then click the Save button to update person information.


Update Person  

> Person Type

▼ Name Information





First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Middle Name	<input type="text"/>	Name Prefix	<input type="text"/>
Name Suffix	<input type="text"/>	Organization Name	<input type="text"/>

▼ Demographics

Date Of Birth	<input type="text"/> 	Primary Language	<input type="text"/>
Gender	<input type="text"/>	Ethnicity	<input type="text"/>
Height	<input type="text"/>	Weight	<input type="text"/>
Eye Color	<input type="text"/>	Hair Color	<input type="text"/>



▼ Image

Image No file chosen



 Save & Back   Back 





Update address

Click and change fields then click the Save button to update address information.

Update Address  



▼

Address Type*	<input type="text"/>
Address 1*	<input type="text"/>
Address 2	<input type="text"/>
Zip	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Effective From	<input type="text"/> 
Effective To	<input type="text"/> 

 Save & Back   Back 

Update telephone


Click and change fields then click the Save button to update telephone information.


Update Telephone  





▼

Telephone Type*

Telephone Number*



Effective From 

Effective To 

 Save & Back   Back 

Update contact


Click and change fields then click the Save button to update contact information:


Update Contact  





▼

Type*

Contact*

Effective From 

Effective To 

 Save & Back   Back 

Dropdown

Summary ▾ Case Involvement

- Update Person
- Add Address
- Add Telephone
- Add Contact
- Add Identification
- Add AKA
- Add Person Special Status
- Utilities ▸

- Select **Update Person** to manage information, including name, date of birth, appearance, and a [Header](#) photo.

Update Person ↕ 📄

> Person Type

▾ Name Information

First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Middle Name	<input type="text"/>	Name Prefix	<input type="text" value="..."/>
Name Suffix	<input type="text" value="..."/>	Organization Name	<input type="text"/>

▾ Demographics

Date Of Birth	<input type="text"/> 📅	Primary Language	<input type="text" value="..."/>
Gender	<input type="text" value="..."/>	Ethnicity	<input type="text" value="..."/>
Height	<input type="text" value="..."/>	Weight	<input type="text" value="..."/>
Eye Color	<input type="text" value="..."/>	Hair Color	<input type="text" value="..."/>

▾ Image

Image No file chosen

- Select **Add Address** to add an address for the **Person**.

Add Address Add to Smith, John

Address Type*

Address 1*

Address 2

Zip

City

State

Effective From

Effective To

Save & Back Save & Add Another Back

- Select **Add E-mail** to add an email address for the **Person**.

Add Contact Add to Smith, John

Type*

Contact*

Effective From

Effective To

Save & Back Save & Add Another Back

- Select **Add Telephone** to add a telephone number for the **Person**.

Add Telephone Add to Smith, John ▼ ↺ ✎

▼

Telephone Type*

Telephone Number*

Effective From 📅

Effective To 📅

📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Identification** to add identifying documents for the **Person**.

Add Identification Add to Smith, John ▼ ↺ ✎

▼

Identification Type*

Identification Number*

📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Person Attribute** to add descriptive attributes for the **Person**.

Add Person Attribute ? Add to Burns, Montgomery ▼

▼

Start Date* 📅

Attribute*

Category

Memo

? Alert

End Date 📅

📄 Save & Back 📄 Save & Add Another ⬅ Back

- Select **Add Note** to add a note to the **Person**.

Add Person Note Add to Smith, John ↺ ↻

Type*

Note*

↶ ↷ Paragraph ▼ System Font ▼
☰ ☰ A ▼ ✎ ▼ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

💾 Save & Back 💾 Save & Add Another ⬅ Back

- Select **Search involvements** to find all involvements for a **Person** by involvement type or date of involvement.

Search Involvements

Involvement Type ☰ Case Status ☰
 Case Type ☰

Search

Involvement Type	Case Type	Case Name	Case Number	Case Status	Case Status Date
Defendant	Felony	Smith, John	22-1	Open	06/23/2022

Results 1 - 1

📄 Excel 📄 PDF 📄 Archive

- Select **Person Merge (beta)** to [Merge](#).

File cabinet:

Click [**File Cabinet**] to show the **File Cabinet Folder View**. For more information, refer to [Filing cabinet](#).

Dropdown

File Cabinet ▼ Relatic

Add Person File(s)
 Document Viewer

- Select **Add Person File(s)** to add files to the **Person**.

Search Involvements

Involvement Type Case Status

Case Type

Search



Involvement Type	Case Type	Case Name	Case Number	Case Status	Case Status Date
Defendant	Felony	Smith, John	22-1	Open	06/23/2022


Results 1 - 1

Excel PDF Archive

Relationships

The **Relationship Folder View** shows all relationships of the selected person and allows for quick editing by clicking a relationship. Refer to [Relationships](#) for more information.

Relationships  

Type	Sub Type	Related Name	Start Date	End Date
Family	Sibling	Smith, Jane 		

Dropdown

Relationships

Add Relationship
Graph

- Select **Add Person Relationship** to add a relationship for the **Person**.

Add Relationship Add to Smith, John ▼ ↺ ✎

Relationship

This Name Smith, John

Related Name* 🔍 ✎

Type* ▼ Start Date 📅

Sub Type* ▼ End Date 📅

Inverse

Type* ▼ Start Date 📅

Sub Type* ▼ End Date 📅

📄 Save & Back 📄 Save & Add Another ← Back

Using links

This section describes two different ways that links work in eAttorney:

- <https://documentation.journaltech.com/eAttorney/user/links/icons.html>:
- https://documentation.journaltech.com/eAttorney/user/links/update_screens.html:



Icon links

Hovering over an icon link shows a tooltip indicating the icon click action.

Person or directory person record

Click  or  to show the **Person** or **Directory Person** record.

Add note for record

Some row records allow you to add a note directly. Click  or  to open the **Add Notes** widget.



The screenshot shows a 'Note for 07/19/22 12:30 PM Arraignment in Courtroom 1' window. At the top right is a close button (X). Below the title bar is a search bar (1) with a search icon and a '+ Add Note' button (2) with a red arrow pointing to it. Below the search bar is the 'Add Note' section. It includes a 'Case Note Type*' dropdown (3), a rich text editor toolbar with options like Paragraph, sans-serif, bold, italic, text color, background color, table, list, link, and insert (3), and a large text area. Below the text area is an 'Add Tags' field (4) with a bookmark icon. Below that is a 'To-do' item field (5) with a person icon and the text 'Office'. At the bottom are three buttons: 'Save & Close', 'Save', and 'Close'. On the right side of the bottom are two buttons: a color selection button (7) and a macro selection button (8). Below the 'Add Note' section is a checkbox (6) labeled 'Include All Notes From Case'.

1. Enter a search term here to find notes associated with the record.
2. Click the dropdown to toggle the [Advanced Note Search](#).
3. Enter the case note type and body with text document formatting options.
4. Use the field to add new or existing tags to notes.
5. Create a to-do item for an assignee and set sharing rights for the note.
6. Select **Include All Notes From Case** to show a list of all case notes in the popup window.
7. Select a note color.
8. Select a note macro.


Advanced note search

Use the **Advanced Note Search** to filter notes by color, tags, note type, sharing level, and by case.



Search...  [+ Add Note](#) 

Colors



Tags

Note Types

Show Case Notes Show Document Annotations

Types

Case Note Investigation Summary Investigator Log VAWA Log

Date created

Today
 This week
 This month
 Last 3 months


Sharing

Display notes shared with everybody
 Display notes shared with me
 Display notes shared with my user group

Case





Search All Cases
 Include All Notes From Case



View involvements

Click  to open the **Involvements** popup. Use the popup to search for a **Person** involvements on cases based on the involvement Type and creation date of the involvement.

John Smith Involvements




Search Involvements

Involvement Type   Case Status  


Case Type  

Involvement Type	Case Type	Case Name	Case Number	Case Status	Case Status Date
Witness	Investigation	Smith, Jane	21-4	Closed	07/29/2021
Defendant	Felony	Smith, John	22-1	Open	06/23/2022


Results 1 - 2

 Excel  PDF  Archive

Collapse or expand panels


Click  to expand or collapse all panels in the form. This icon shows at the top of most forms.

Lookup

Click  to open an **Advanced Search** popup. The icon shows next to **Search** field in **Add** forms. The search may be for a **Case**, **Person**, or other entity.

Search

Search Location

Courthouse/Room Picker Location Type 

Location Name

Results 1 - 4



Location Name	Path
Courtroom 1	County Superior Court / Example Courthouse 2 / Courtroom 1
Example Courthouse 2	County Superior Court / Example Courthouse 2
Courtroom A	County District Court / Example Courthouse 1 / Courtroom A
Example Courthouse 1	County District Court / Example Courthouse 1

Results 1 - 4



Update screens

Update screen hyperlinks

Links in a folder screen open the **Update** screen for that row of data. For example, clicking the **Defendant** link opens the **Update** screen for that party record.

Case Summary  

Defendant

Type	Person
Defendant	Smith, John  

On this screen, you can update the record that you clicked on the previous screen:

Update Involvement  

▼

Involvement Type* ▼

Person* 🔍 ✕

Custody Status ▼

Memo

Update Records On Related Cases No Related Records

 Save & Back   Back 

If that record is deletable, a **[Delete Record]** button shows on the bottom right of the **Update** screen.



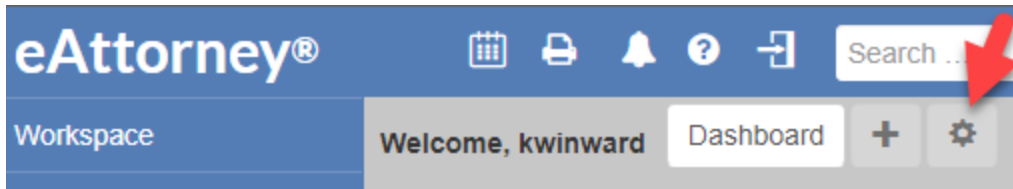
Dashboard

The dashboard provides a configurable starting screen for each user. The screen is created by adding one or more *Gadgets* from the dashboard settings, and then configuring associated settings from the dashboard itself. Once configured, the dashboard, it is accessed by clicking the eAttorney logo on the top-left of the screen.

Dashboard settings

Dashboard settings are accessed one of two different ways:

1. If the dashboard is not yet configured, the dashboard settings screen opens as soon as a user first accesses the dashboard page.
2. Once configured, the dashboard settings can be accessed by:
 1. Viewing up the dashboard.
 2. At the top of the dashboard, find the **[Dashboard]** button, and click the gear icon to show User Settings:



Inside the user settings for the dashboard, a user can add or remove gadgets from their dashboard:

Gadget
Description
Archived searches [https://documentation.journaltech.com/eAttorney/user/dashboard/archived_searches.html]
View the latest archived searches
Assignments
View your current action items/assignments.
Calendar
View calendar for five weeks for given location.
Cases
View recent, assigned, upcoming events, recent activity, or open tasks on cases that you are working with or are assigned to you.
Collector Summary
View Collector Summary
Date Calculator
Calculate a date N number days out avoiding holidays or dark times.
Directory Search
Search the Directory
Interest Calculator
Calculate simple interest given a starting amount, interest rate and number of days.

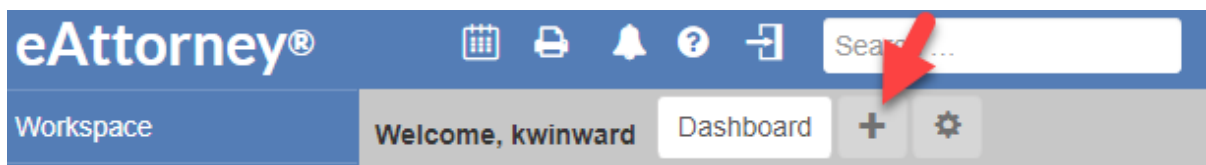
News [https://documentation.journaltech.com/eAttorney/user/dashboard/news.html]
View court news
Notepad
Notepad for personal reminders and post-its
Recent reports [https://documentation.journaltech.com/eAttorney/user/dashboard/recent_reports.html]
View recent generated reports
Saved search results [https://documentation.journaltech.com/eAttorney/user/dashboard/saved_search_results.html]
Display the latest results from a saved search
Saved searches [https://documentation.journaltech.com/eAttorney/user/dashboard/saved_searches.html]
View your saved searches

Multiple tabs

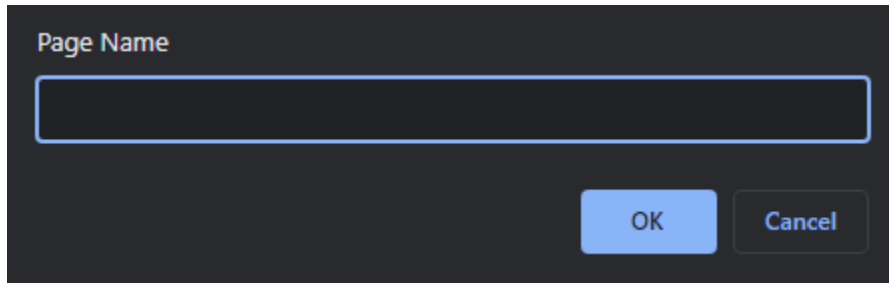
An individual dashboard may be configured to use an arbitrary number of Gadgets, including multiple copies of the same Gadget with different configurations. Despite this, users may find it more convenient to add more tabs to the dashboard, creating different screens for different types of information or tasks.

To add more tabs:

1. Browse to the existing dashboards by clicking the eAttorney logo at the top-left of the screen.
2. Click the *Add New Tab* button, represented as a +, next to the "User Settings" gear icon.



3. After the "Add New Tab" icon is clicked, a popup prompts you for the new Page Name:



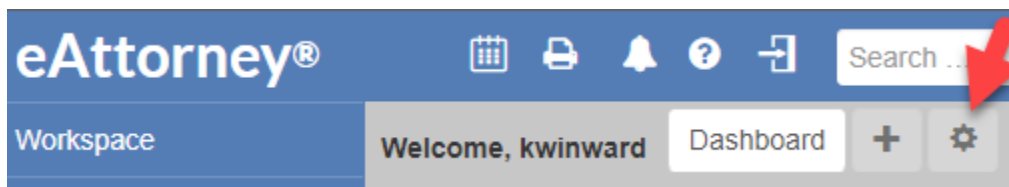
4. Fill in the prompt with the name of the new dashboard, then click [OK].
5. The new tab behaves exactly like the first dashboard, the only difference being separately configured Gadgets.

Archived search gadget

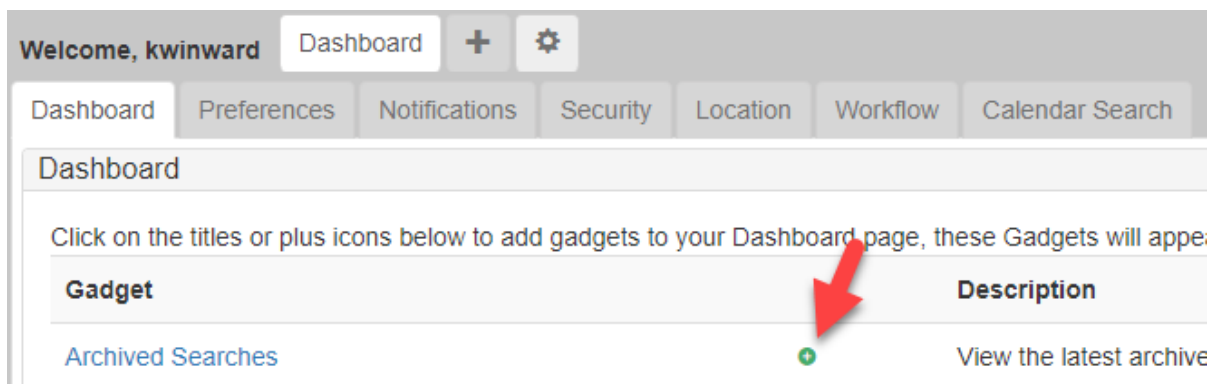
The **Saved Searches** gadget shows a list of saved searches with the option to quickly run or open them directly. The search can also be expanded to show the search parameters.

Add the gadget

1. Open the dashboard.
2. At the top of the dashboard, find the **Dashboard** tab, and click the **gear** icon to show the **User Settings** screen:

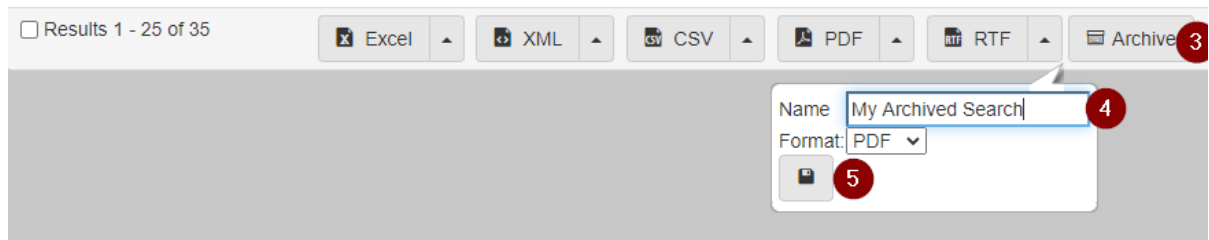


3. Click the + button next to the Archived Searches item:



Create an archived search

1. Browse to a search in the system.
2. Fill out the parameters as required, then click [**Search**].
3. Scroll down to the bottom of the search results, then click [**Archive**].
4. A dialog opens prompting you to give the **Archived Search** a name, and to set the save format.
5. Click the **Save** icon to finish creating the **Archived Search**.



Use the archived searches gadget

The **Archived Searches** gadget must first be added to the Dashboard. Once added, **Archived Searches** are shown:

Archived Searches		
Name	Date	Source
+ Another Archived Search	Nov 24, 2020	Saved Search: Another Archived Search
+ New Archived Search	Nov 24, 2020	Saved Search: New Archived Search
+ My Archived Search	Nov 24, 2020	Saved Search: My Archived Search
+ archived search	Nov 24, 2020	Saved Search: archived search

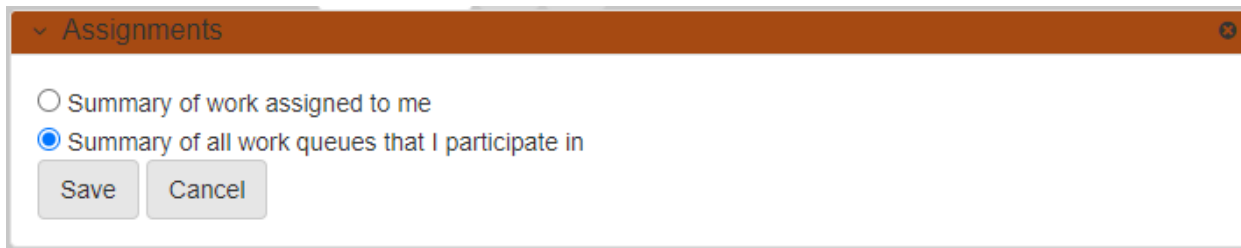
1. Each **Archived Search** is listed by Date.
2. Click the name of the **Archived Search** to download the associated file.

Assignments gadget

The assignments gadget can be used to show your assignments, assignments for those you supervise, or unassigned items. It can be added by clicking the gear icon at the top of your dashboard, then clicking the **[+]** button next to the Assignments gadget. After clicking the **Close Settings** button, the Assignments gadget show up on your dashboard.

Configure the assignments gadget

To configure the Assignments gadget, click the gear icon in the top right corner of the gadget on the Dashboard. After clicking the icon, the following screen opens:



There are two options to choose from when configuring the gadget:

1. **Summary of work assigned to me** - filters the list to show only items that are assigned to you.
2. **Summary of all work queues that I participate in** - display all work queues and assignments that you are responsible for. If you are a manager, you can see work assigned to others that you manage.

Use the assignments gadget

The Assignments gadget shows a list of all items assigned to you. Click an assignment or a number in one of the columns to view more information.

Work Queue	Open	!	UA	PD	TO
Your Case Tasks	9	0	5	1	1
Jacob Adams	4	0	–	1	1
Unassigned	5	0	–	0	0

The columns highlight when each task is due. You can hover over each column header to see what the abbreviation means.

Here is what the columns mean:

- **Open** - Incomplete assignments.
- **!** - High priority.
- **UA** - Unassigned.
- **PD** - Past due.
- **TO** - Due today.
- **Tmw** - Due tomorrow.

Clicking the arrow or play button allows you to quickly claim the next unassigned task.

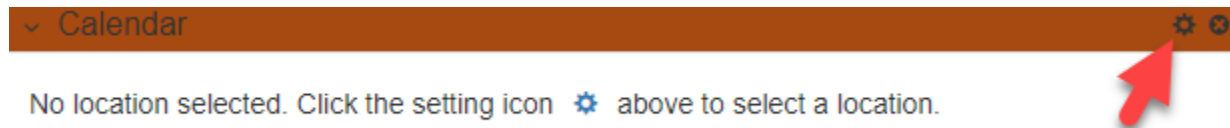
Click an assignment to show more details or to navigate to the case where the assignment comes from.

Calendar gadget

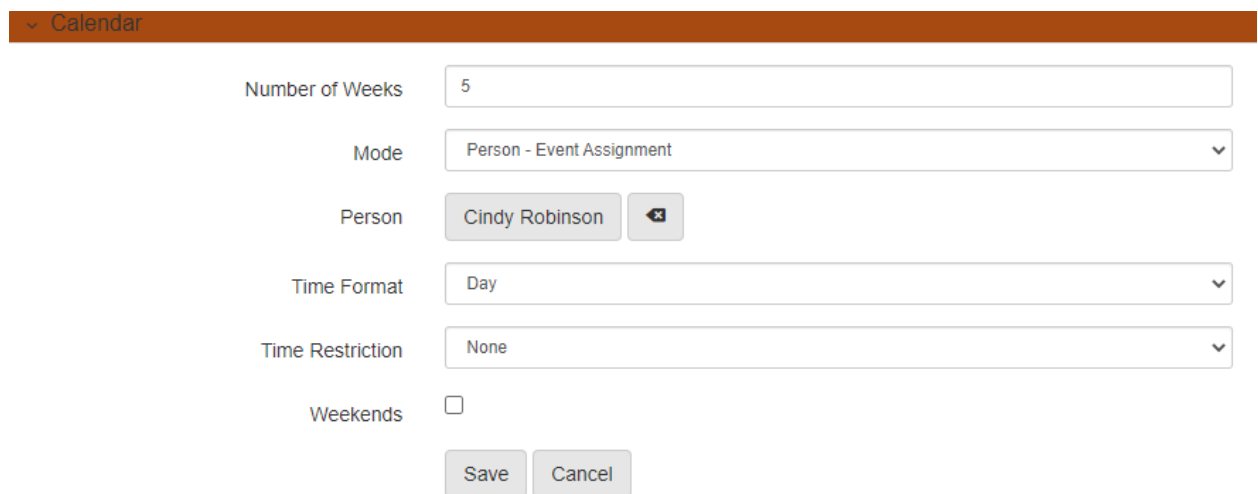
The calendar gadget can be used to show events, holidays, and time off for persons or locations. It can be added by clicking the gear icon at the top of your dashboard, then clicking the **[+]** button next to the Calendar gadget. After clicking the **Close Settings** button, the Calendar gadget shows on your dashboard. But, you still need to configure the gadget to display the calendar with the data you want.

Configure the calendar

To configure the calendar gadget, click the gear icon in the top right corner of the gadget.



After clicking the gear icon, you can configure the gadget to display the information that is important to you.

A screenshot of the configuration settings for the Calendar gadget. The settings are displayed in a light gray box with a dark orange header bar at the top containing a white downward arrow and the text "Calendar". The settings include:

- Number of Weeks: A text input field containing the number "5".
- Mode: A dropdown menu with "Person - Event Assignment" selected.
- Person: A text input field containing "Cindy Robinson" and a small square button with an "X" icon to its right.
- Time Format: A dropdown menu with "Day" selected.
- Time Restriction: A dropdown menu with "None" selected.
- Weekends: A checkbox that is currently unchecked.

At the bottom of the settings box, there are two buttons: "Save" and "Cancel".

In addition to a person, you can configure the calendar to show information for location:

Calendar

Number of Weeks

Mode

Department at Example Courthouse 1

Time Format

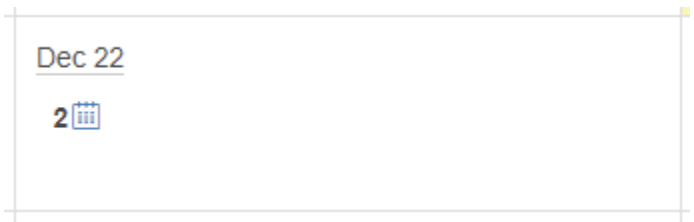
Time Restriction

Weekends

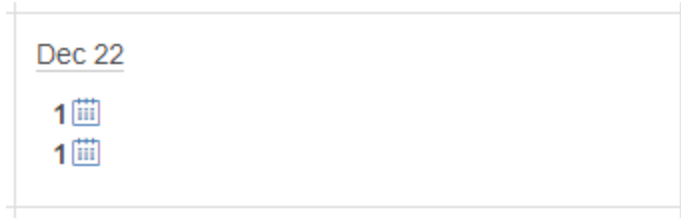
Calendar fields

- **Number of Weeks:** This is the number of weeks to show in the calendar.
- **Mode:** Which entity to show data for. *Person* and *Location* are the options that are most useful.
- **Department:** If you select *Location* as the Mode, then you can select the department. Select the Courthouse first, then select the department in the selected courthouse. Courthouses and departments (Directory Organizations) are configured by an administrator.
- **Person:** If you select *Person* as the Mode, then you can search for the person to show the calendar for. Commonly, you want to search for your own name here to see the events on your calendar, but if you are a supervisor, you may want to see the calendars of your employees.
- **Time Format:** There are 3 formats to choose from:

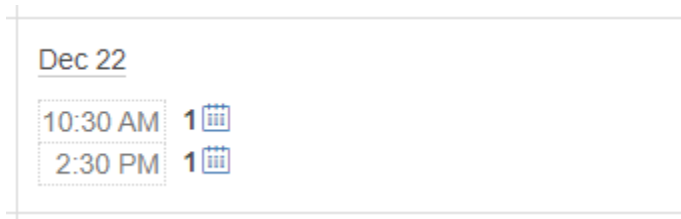
a. Day:



b. AM PM:



c. **Start Time:**



- **Time Restriction:** You can filter the events by *AM* or *PM*. Selecting *None* shows all events.
- **Weekends:** If checked, then weekends show on the calendar. Otherwise, weekends are hidden.

View the calendar

After successfully configuring the calendar, it shows on your dashboard.

Welcome, Wendi Burnett Dashboard + ⚙

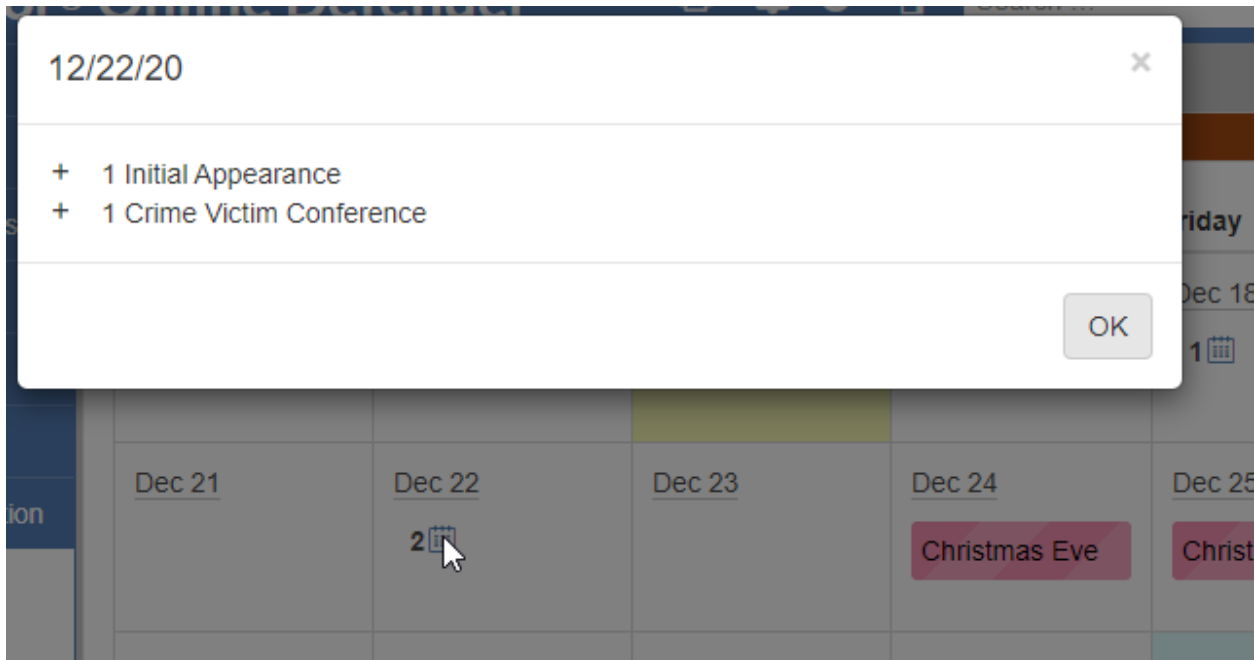
Calendar Burnett, Wendi (Prosecuting Attorney)

Monday	Tuesday	Wednesday	Thursday	Friday
Dec 14	Dec 15	Dec 16	Dec 17	Dec 18 1 📅
Dec 21	Dec 22 2 📅	Dec 23	Dec 24 Christmas Eve	Dec 25 Christmas
Dec 28 Paid Time Off	Dec 29 Paid Time Off	Dec 30 Paid Time Off	Dec 31 Paid Time Off	Jan 1 - 2021
Jan 4 - 2021	Jan 5 - 2021	Jan 6 - 2021	Jan 7 - 2021	Jan 8 - 2021
Jan 11 - 2021	Jan 12 - 2021	Jan 13 - 2021	Jan 14 - 2021	Jan 15 - 2021

◀ ▶ Today

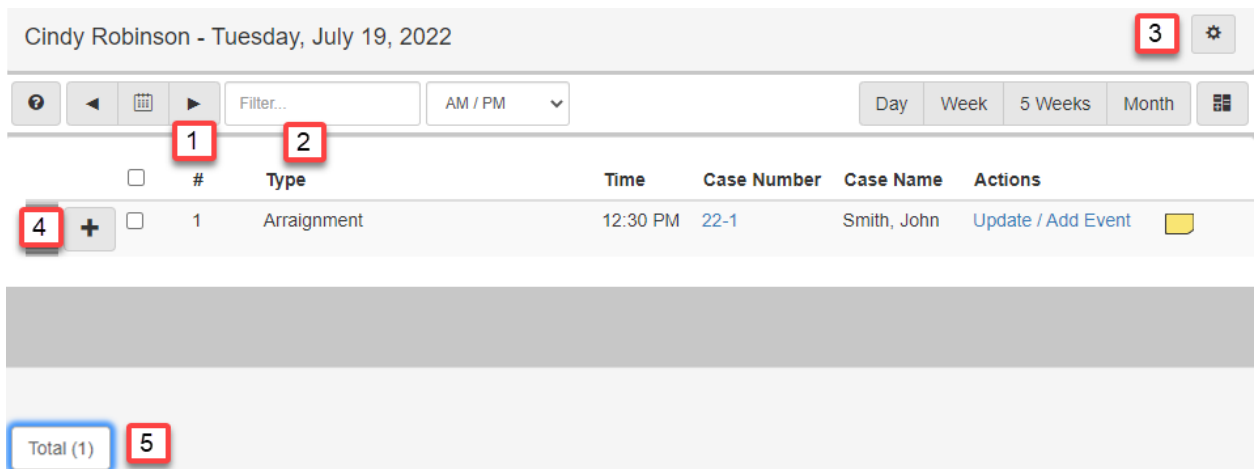
As you can see, the calendar shows events, holidays, and off time for the selected person. Holidays and off time are configured by the administrator.

If you click an event or set of events, a popup shows information about the events:



Calendar day details

If you are on the calendar and you click a day instead of an event, then the next screen shows the agenda for the day:



Here are some of the features of the Calendar Day Details view:

1. Change which day you are viewing by using the arrow keys or the calendar icon in the top left corner.
2. Filter the events you see by typing in the filter box.
3. Change which calendar you are viewing by clicking the gear icon in the top right.
4. View some quick details of the case that the event is on by clicking the [+] button next to the event.

5. If you have applied a filter, you can click the **Total** button at the bottom to clear the filter and view all cases/events again.

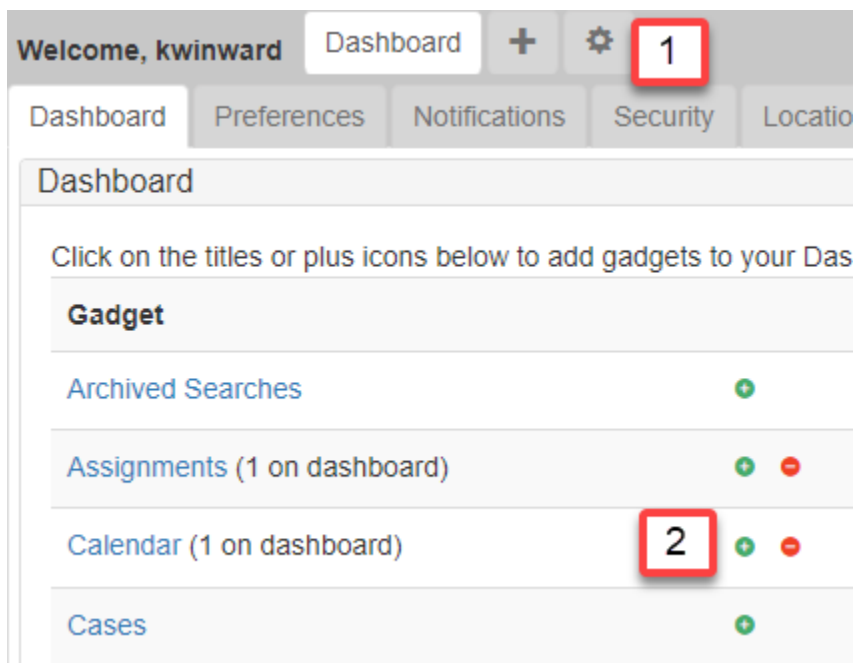
Cases

The Cases Gadget displays a list of your recent cases. The gadget can be configured to show watched cases, assigned cases, upcoming events, recent activity, and workflow tasks. By default, the **Cases Dashboard Gadget** shows some information about your recent cases.

Add the cases gadget

To Add the Cases Dashboard Gadget to your Dashboard, make sure you have the Dashboard tab selected (if you have multiple tabs available).

1. Click the Cog Wheel at the top of the Dashboard.
2. Click the Green Plus Sign + to add Cases to your Dashboard.



You should now be able to see the Cases Gadget at the bottom of your Settings screen. Click Close Settings to exit.

Use the cases gadget

The Cases Gadget must first be added to the Dashboard. Once added, recent cases are displayed in a default view. Take a look at the Cases Gadget available actions:

Case Number	Case Name		
22-1	Smith, John		
20-3	Lee, Karen	+	
20-2	Lee, Karen	+	
21-4	Terry, Scary		

View More...

1. Click a Caseld to navigate to the recent case.
2. Click a Case Title to navigate to the recent case.
3. The Paper Icon opens the Case Notes in a popup.
4. View More... navigates to the My Recent Cases predefined screen. It looks similar to the gadget.

Note for 22-1: Smith, John

📄

Search... 🔍 + Add Note 🖨️

Document Note

📄 06/28/22 Complaint (ExamplePDF.pdf)

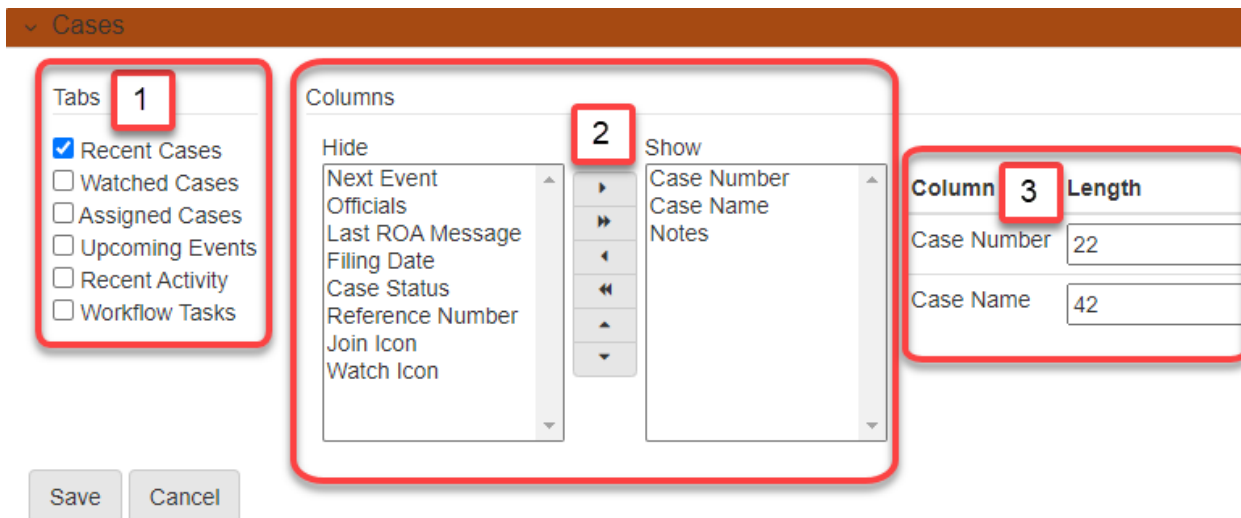
This is an example note.

06/28/22 by kwinward

5. Clicking the Cog Wheel opens Gadget configuration.

Configure the cases gadget

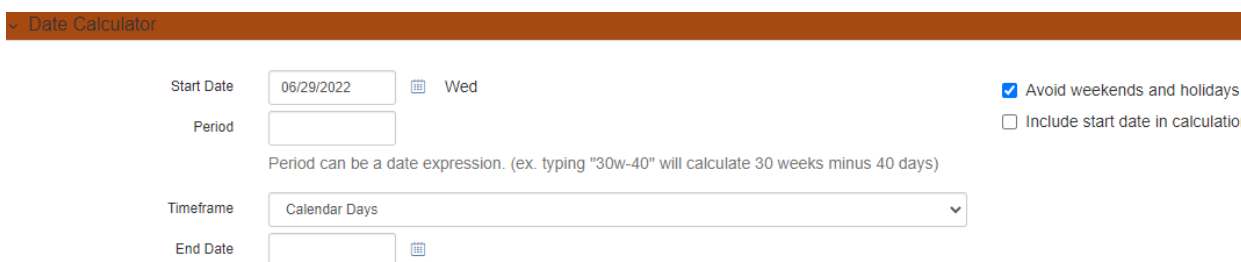
The Cases gadget can also be configured to show other case related information. To configure the gadget click the gear icon found in the top right corner of the gadget (#5):



1. Select which tabs you want displayed in the gadget. The options are watched cases, assigned cases, upcoming events, recent activity, and workflow tasks. Each selected item adds a new tab to the gadget.
2. Select the columns you would like to see in the table.
3. Choose the character length visible in the column.

Date calculator gadget

The **Date Calculator** gadget can be used to calculate dates based on several criteria. The gadget can be added by clicking the gear icon at the top of your dashboard, then clicking [+] next to the **Date Calculator** gadget. After clicking the [**Close Settings**] button, the date calculator gadget shows on your dashboard.



Field	Description
Start Date	The date to use as the start of your calculation.

Field	Description
Period	<p>One of two options:</p> <ol style="list-style-type: none"> 1. A number that is based on the time frame selected in the Timeframe field. 2. A date expression that can use a combination of years (y), months (m), weeks (w), and days (d) as input. <p>For example: a Period of 5y+3m+1w-1d would calculate the date that is 5 years, 3 months, 1 week, minus one day out from the date selected in the Start Date field.</p>
Timeframe	<p>The unit of time to use for the Period. Valid values are: Business Days, Calendar Days, Months, Weeks, Years.</p> <p>For example: to calculate 15 business days from now, you would enter 15 as the Period and Business Days as the Timeframe.</p>
End Date	<p>This is the date that is calculated based on the criteria you enter. After the End Date field is a description of how many calendar days and business days are between the Start Date and the End Date.</p>
Avoid weekends and holidays	<p>Select to adjust an End Date that would have fallen on a weekend or holiday to the next available work day. Holidays are set by your administrator.</p>
Avoid off times for <User Name>	<p>Select to adjust an End Date that would have fallen on a day that you have scheduled off to the next available work day. Off time is configured on the DirPerson record by an administrator.</p>

Directory search gadget

The directory search gadget can be used to search people and organizations in the

directory. It can be added by clicking the gear icon at the top of your dashboard, then clicking the **[+]** button next to the Directory Search gadget. After clicking the **Close Settings** button, the directory search gadget shows on your dashboard.

▼ Directory Search

John

2 Results for John

Name	Location	Role
Bravo, Johnny (Law Enforcement)	County Sheriff	LAW
Lwin, John (System Administrator)		SYSADMIN

After performing a search, you can click the mail icon to email individuals returned from the search.

Interest calculator


The interest calculator is a gadget you can add to your dashboard if you calculate interest a lot. The interest calculator widget can be added to you dashboard by clicking the gear icon at the top of the dashboard, then selecting the **[+]** button next to the Interest Calculator. After adding the gadget and clicking the **[Close Settings]** button, the interest calculator gadget shows on your dashboard.


▼ Interest Calculator

Starting Amount (PV)

Annual Interest Rate

Number of Days

Start Date 

End Date 

Days In Year ▼

Interest Earned

Future Value (FV)

Field descriptions

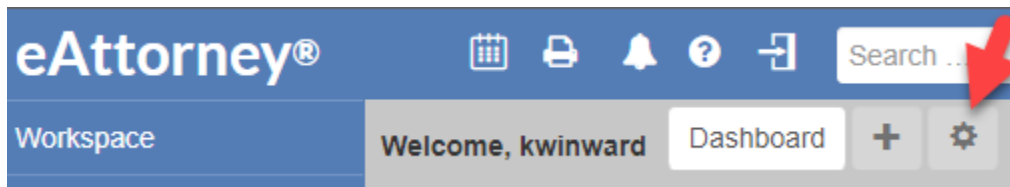
- **Starting Amount (PV):** PV stands for "Present Value" and is the starting amount you would like to use in your calculation.
- **Annual Interest Rate:** The interest rate over a year that is applied to the Starting Amount.
- **Number of Days:** This is how many days the interest accrues for.
- **Start Date:** The date that interest starts accruing.
- **End Date:** The date the interest stops accruing, or the date you want the interest calculation to stop.
- **Days In Year:** Select the number of days in a year that the interest rate is based on. Valid values are 360, 364, 365.
- **Interest Earned:** This is the amount of interest that is earned given the values you provided.
- **Future Value:** This is the sum of the Starting Amount and the Interest Earned, and shows you the value of the money after earning interest over the time frame.

News gadget

The **News gadget** shows a message from administrators.

Add the gadget

1. Open the **Dashboard**.
2. At the top of the **Dashboard**, find the **Dashboard** tab, and click the **gear** icon. The **User Settings** screen shows.



3. Click [+] next to the **News** item:

Welcome, kwinward Dashboard + ⚙️

Dashboard Preferences Notifications Security Location Workflow Calendar Search

Dashboard

Click on the titles or plus icons below to add gadgets to your Dashboard page, these Gadgets will appear

Gadget		Description
Archived Searches	+	View the latest archived searches
Assignments (1 on dashboard)	+ -	View your current action items
Calendar (1 on dashboard)	+ -	View calendar for five weeks
Cases (1 on dashboard)	+ -	View recent, assigned, upcoming cases
Date Calculator (1 on dashboard)	+ -	Calculate a date N number of days
Directory Search (1 on dashboard)	+ -	Search the Directory
Interest Calculator (1 on dashboard)	+ -	Calculate simple interest given principal, rate, and time
News	+	View court news

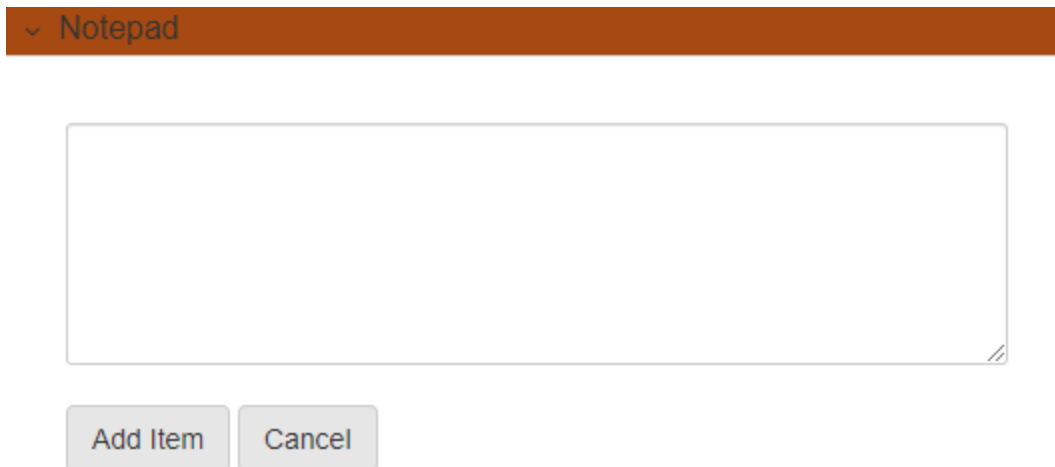
Notepad gadget

Use the **Notepad** gadget to take free-text notes. To add the gadget, click the **gear** icon at the top of your **Dashboard**, click **[+]** next to the **Notepad** gadget, then click **[Close Settings]**.

⌵ Notepad

+ Add New Note

To add a note, click **[Add New Note]**, type the note text, then click **[Add Item]**.



To delete a note, click the **trash can** icon next to the note.

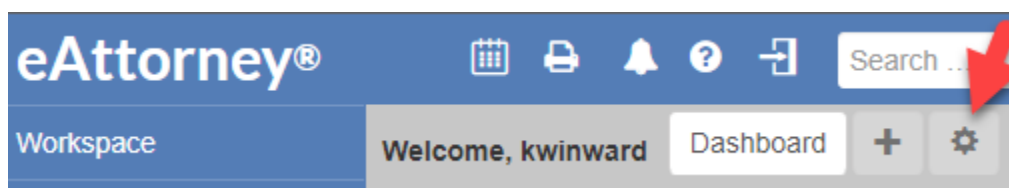
To edit a note, click the text of the note, make your edits, then click **[Update]**.

Recent reports gadget

The **Recent Reports** gadget shows a list of recently saved PDF reports with an option to share them using email.

Add the gadget

1. Open the **Dashboard**.
2. At the top of the **Dashboard**, find the **Dashboard** button, then click the **gear** icon to show the **User Settings** screen.




3. Click **[+]** next to the **Recent Reports** item:

Welcome, kwinward Dashboard + ⚙

Dashboard Preferences Notifications Security Location Workflow Calendar Search

Dashboard

Click on the titles or plus icons below to add gadgets to your Dashboard page, these Gadgets will appear next

Gadget		Description
Archived Searches	+	View the latest archived searches
Assignments (1 on dashboard)	+ -	View your current action items/as
Calendar (1 on dashboard)	+ -	View calendar for five weeks for g
Cases (1 on dashboard)	+ -	View recent, assigned, upcoming
Date Calculator (1 on dashboard)	+ -	Calculate a date N number days
Directory Search (1 on dashboard)	+ -	Search the Directory
Interest Calculator (1 on dashboard)	+ -	Calculate simple interest given a
News	+	View court news
Notepad (1 on dashboard)	+ -	Notepad for personal reminders a
Recent Reports	+ 	View recent generated reports

Use the recent reports gadget

To use the **Recent Report** gadget, you must first [Add the gadget](#) to your **Dashboard**.

- Recent Reports				
	Name		Last Modified	
+	Calendar Report	Yes	11/18/2016 by admin	
+	Trust Transactions	Burbank Courthouse	01/20/2016 by admin	

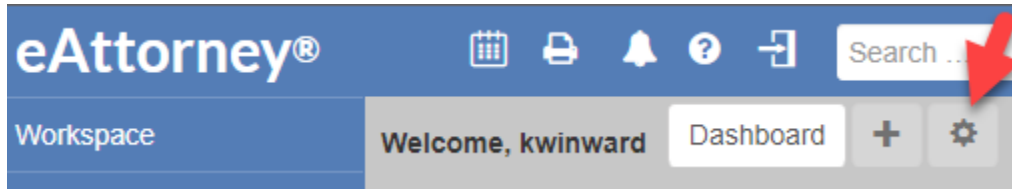
To share a PDF report, click the **envelope** icon next to a report.

Saved search results gadget

The **Saved Search Results** gadget shows the real-time results of a saved search.

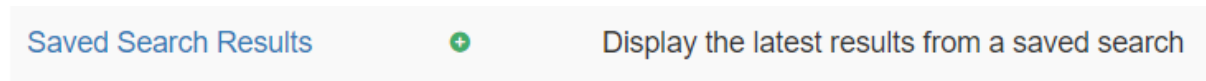
Add the gadget

1. Open the **Dashboard**.
2. At the top of the **Dashboard**, find the **Dashboard** button, then click the **gear** icon.



The **User Settings** screen shows.

3. Click [**+**] next to the **Saved Search Results** item:



4. Click [**Close Settings**] button, after the list of available gadgets. The **Dashboard** screen shows with the new gadget added.
5. Find the **Saved Search Results** gadget, then click its **gear** icon to show the **gadget settings**:



6. Select the **Saved Search** to use.
7. Set the number of results to show per page.
8. Click [**Submit**].

Select Saved Search

Search Case - Open Criminal Investigations 6 ▼

10 7

Submit 8

Use the saved search results gadget

To use the **Saved Search Results** gadget, you must first [Add the gadget](#) to your Dashboard and configure it. Once added, saved search results show on your **Dashboard**.

Results can be used to:

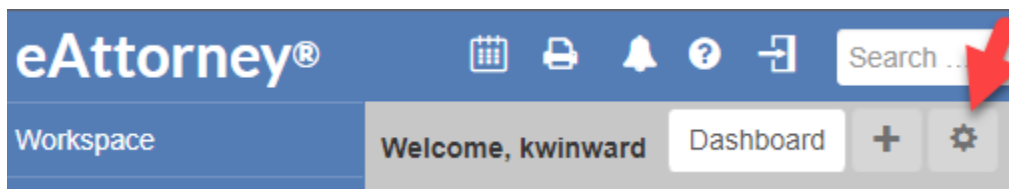
1. Quickly link to associated search results.
2. Execute actions:
 - Bulk schedule.
 - Export case events.
 - Join cases.
 - Cash receipts.

Saved search gadget

The Saved Searches gadget displays a list of saved searches with the option to quickly run or open them directly. The search can also be expanded to display the search parameters.

Add the gadget

1. Open the dashboard.
2. At the top of the dashboard, find the "Dashboard" button, and click the gear icon to go to User Settings:



3. Click the '+' button next to the Saved Searches item:

Saved Searches (1)   View your saved searches

Add a saved search

1. Browse to a search in the system.
2. Fill in parameters that should be included in the Saved Report.



If you have a report you use constantly with slight variations, use a saved search to keep the settings that you use, and then do the fine tuning as part of running the report.

3. Click the Save Icon at the bottom right of the search header. Type a name for the saved search and click the Save Icon again.

Search Case

Case Number

Case Name

Case Type 2

Status

Received Date to

3

Use the saved search gadget

The Saved Search Gadget must first be added to the Dashboard. Once added, Saved Searches show on your Dashboard.

Saved Searches

Name	Search	Last Used	
1 + Bonds	Search Case	Nov 23, 2020	3 ▶ Run Open
- Open Criminal Investigations	Search Case	Nov 23, 2020	▶ Run Open 4
2 in CS002			
in CT026			

1. Each Saved Search is listed by name.
2. Saved Searches can be expanded to look at their saved parameters.



This feature is generally only useful for local administrators who can configure lookup lists.

3. Clicking the 'Run' button opens and executes the Saved Search.
4. Clicking the 'Open' button opens the Saved Search but does not execute it.



This feature is useful when your Saved Search includes only the common settings for the search but needs to have changes made before it is run.

Cases

Cases are the main workspace for the majority of tasks on a daily basis. A case keeps track of: - Who: case-involved people like prosecutors or defendants. - What: charges against the defendant. - When: the date of occurrence or events. - Where: the **location**.

These data points (and more) make up a typical case.

Case folder views

The case folder view has all information about the case, including:

- Involvements.
- Connected cases.
- Justice personnel.
- Case status history.
- Special status on the case.

There are three ways to reach the case folder view:

1. Through the case search found in the navigation bar under **Searches & Reports > Search Case** and filling out case information.
2. If the current user has assigned cases cases, the view pops up in **Workspace > Recent Cases > Select Case**.
3. Clicking the most recent case in the top right corner.

The screenshot displays the user interface for viewing a case folder. On the left, the 'Workspace' sidebar is visible, with 'Recent Cases' expanded to show a list of cases: 'Smith, John', 'Lee, Karen', 'Smith, Mary', and 'Smith, Jane'. A red box labeled '2' highlights this list. Below the sidebar, the 'Searches & Reports' section is highlighted with a red box labeled '1'. The main content area shows the case details for 'Felony ~ 22-1' by 'John Smith'. It includes an 'Open' button, tabs for 'Summary', 'Case Involvements', 'Victim', and 'Charges', and a 'Case Summary' section with a 'Future Events' table. The table has columns 'Type' and 'Date', with one row showing 'Arraignment' on '7/19/22 1'.

Create a case

To create a case, navigate to **Left navigation > Add Case**, then select a case type.

Case numbers are generated by eAttorney. Fields that are marked with a red asterisk are

required before saving.

Workspace

Add Case

- Add Adult Case
- Add Juvenile Case
- Add Investigation Case

Searches & Reports

System Setup

System Admin

«

Add Adult Case

↶ ↷

▼ Case Information

Received Date* 06/29/2022

Case Type*

Status* Open

Status Date* 06/29/2022

▼ Defendant

Person*

Custody Status*

▼ Law Number

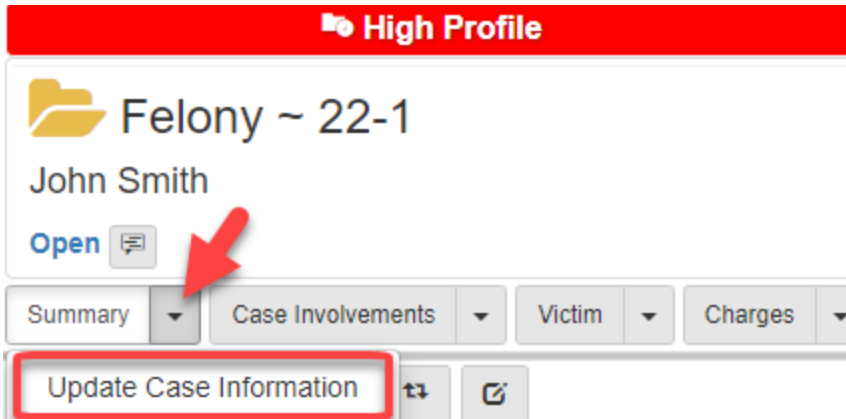
Number

Agency

Save & Open Save & Add Another Back

Delete a case

Deleting a case can be done on the case folder view by clicking **Summary > Update Case Information** and clicking delete in the lower right hand corner.



For more information on accessing the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

Seal case

A case sealing can be added by accessing **Summary > Add Case Special Status** on the case folder view. For information on how to access the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

Fields



1. Status - Seal.
2. Start Date - Date seal goes into affect.
3. End Date - Date seal is removed (if end date is left blank case is sealed indefinitely).

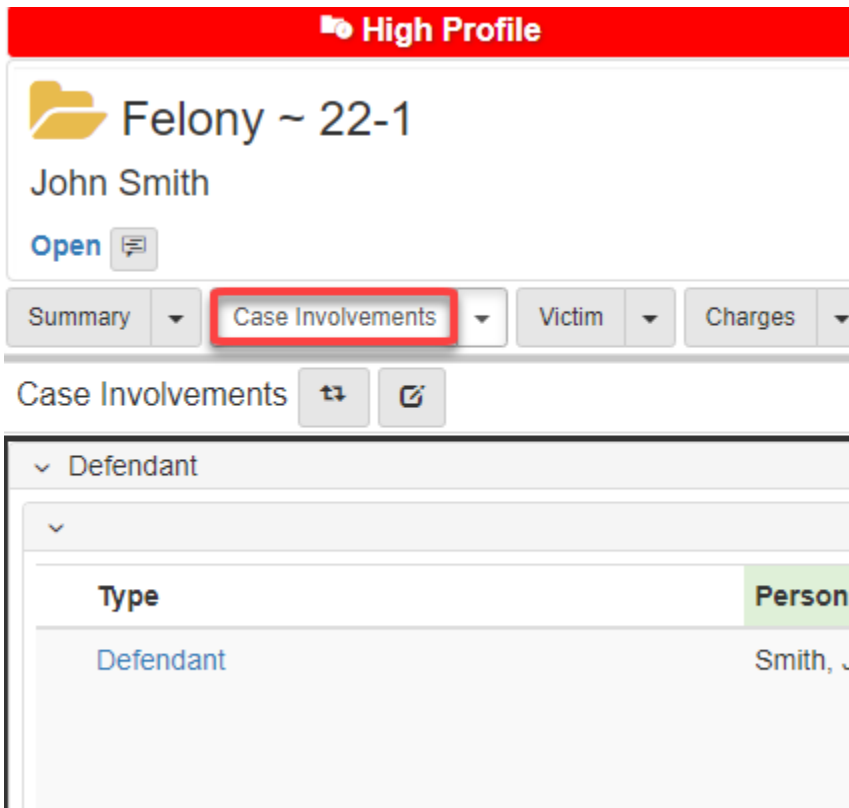


Only individuals with the seal authority are able to seal a case.

Case involvements

The case involvements page displays all individuals that are involved inside of a case (including directory personnel, defendant, victim).

Case involvements can be found under the Case Involvements tab inside of the case folder view. For more information on navigating to the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.



The screenshot shows a user interface for a case folder. At the top, there is a red banner with a megaphone icon and the text "High Profile". Below this, a folder icon is followed by the text "Felony ~ 22-1" and the name "John Smith". There is an "Open" button with a speech bubble icon. Below the name, there are four tabs: "Summary", "Case Involvements" (which is highlighted with a red border), "Victim", and "Charges". Below the tabs, there is a "Case Involvements" label with two icons: a double-headed arrow and a pencil. The main content area shows a dropdown menu with "Defendant" selected. Below this, there is a table with the following structure:

Type	Person
Defendant	Smith, J

Updates

High Profile

Felony ~ 22-1
John Smith



[Open](#)

Summary | Case Involvements | Victim | Charges | Events

Case Summary

> Future Events

▼ Defendant

Type	Person
Defendant 1	Smith, John   2 3

1. Involvements can be updated by clicking the involvement type, which displays the update screen where you can change the involvement type, person, status and more.
2. The person/directory person record can be seen by clicking the person icon.
3. Click the folder icon to display a dialog pop-up displaying all involvements of the selected individual inside of the current database.

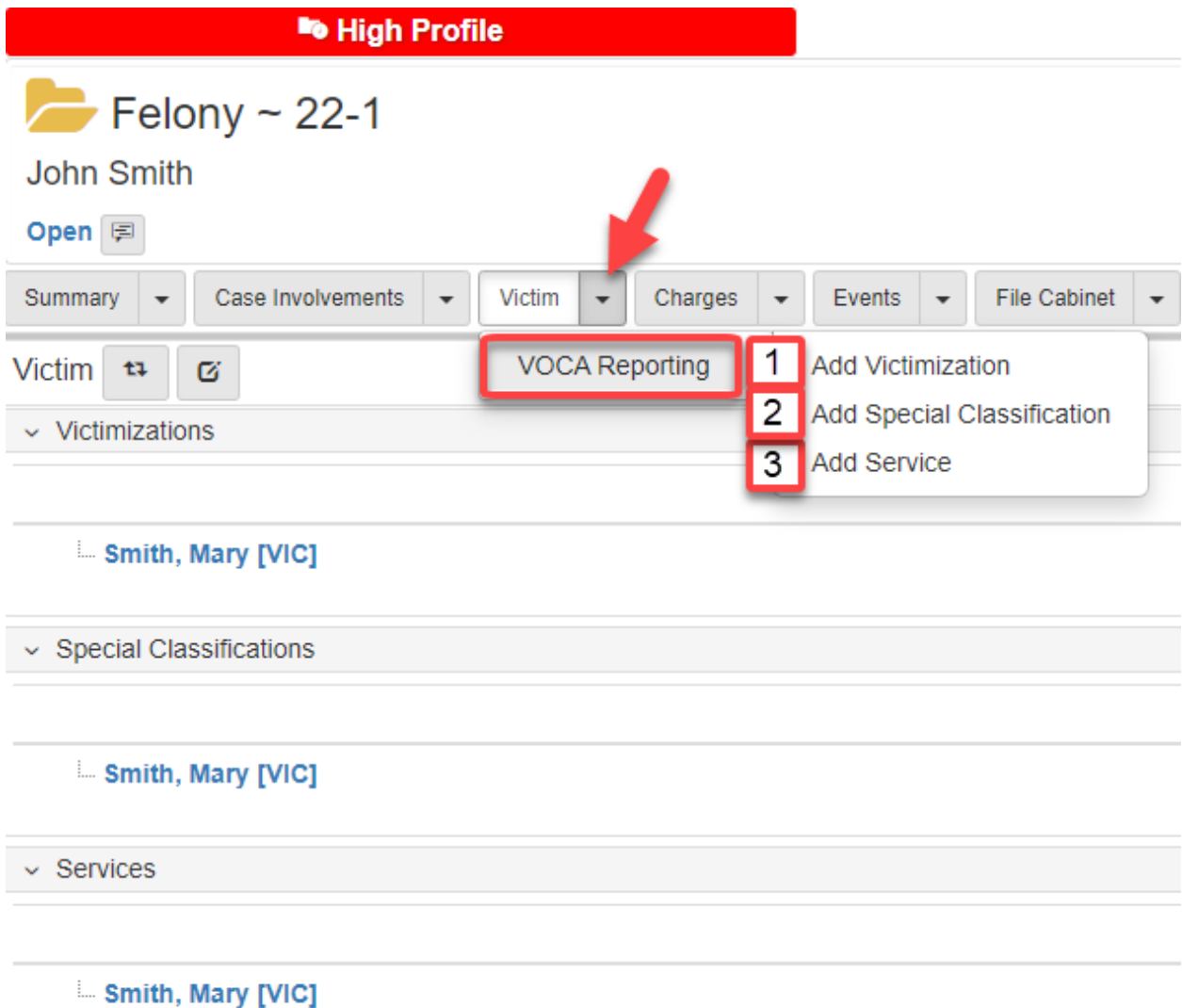


For more information on **Person** or **Directory Person**, see:

- [Person](#)
- [Summary](#)

Victim

The victim tab on the case folder view holds all the information on a case about the victimizations, special classifications, and services provided to victims.



The victim tab can be accessed by clicking **Victim**.

For information on reaching the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

Victims can have many things added to them for VOCA reporting. In the case view, there are three items that can be added for automatic generation of the VOCA report:

1. Add Victimization - Adds victimization type.
2. Add Special Classification - Adds special classification of victimization (for example Homeless, LGBTQ, Veteran, and others).
3. Add Service - Add service provided to victim.

For more information on VOCA reporting, see [VOCA report](#).

Charges

Charges can be accessed by clicking the **Charges** tab in the **Case Folder View**. For information on how to navigate to the **Case Folder View**, refer to <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

The **Charges** screen shows all charges on defendants connected to the case. Charges can be updated by clicking the corresponding charge:

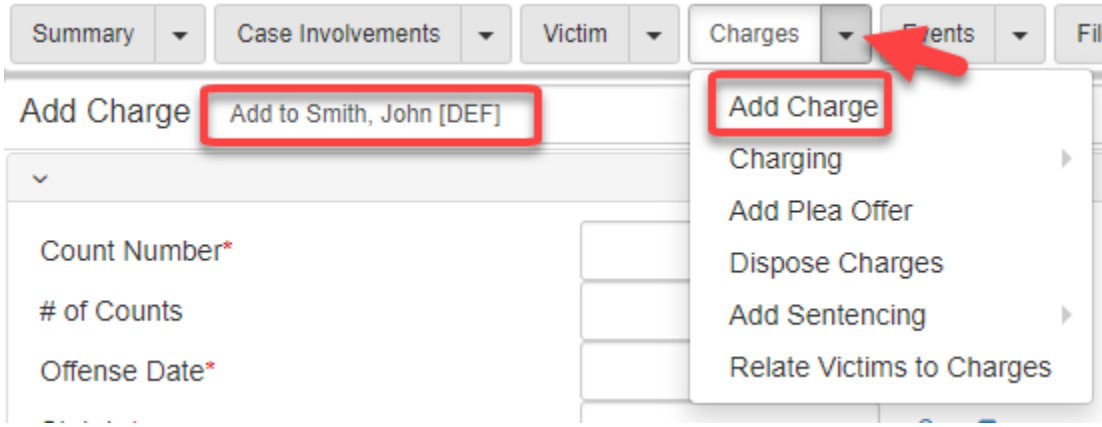
The screenshot displays the 'Charges' interface for a case. At the top, a red banner indicates 'High Profile'. Below it, the case title 'Felony ~ 22-1' and the defendant's name 'John Smith' are shown, along with an 'Open' button. A navigation bar includes tabs for 'Summary', 'Case Involvements', 'Victim', 'Charges', 'Events', and 'F'. The 'Charges' tab is active, and a dropdown menu is open, listing several actions: '1 Add Charge', '2 Charging', '3 Add Plea Offer', '4 Dispose Charges', '5 Add Sentencing', and '6 Relate Victims to Charges'. Below the dropdown, the 'Active Charges' section is visible, showing a table with a 'Count' header and a row for 'Smith, John [DEF]' with a '7' in a red box next to the charge description 'Count 1 163.185 Assault In The First Deg'.

Other options can be selected from the **Charges** dropdown. The options include:

1. Add Charge
2. Charging Decision
3. Add Plea
4. Add Charge Characteristic
5. Add Charge Intoxicant
6. Add Exhibit
7. Dispose Charges
8. Sentencing
9. Update charges

Add items

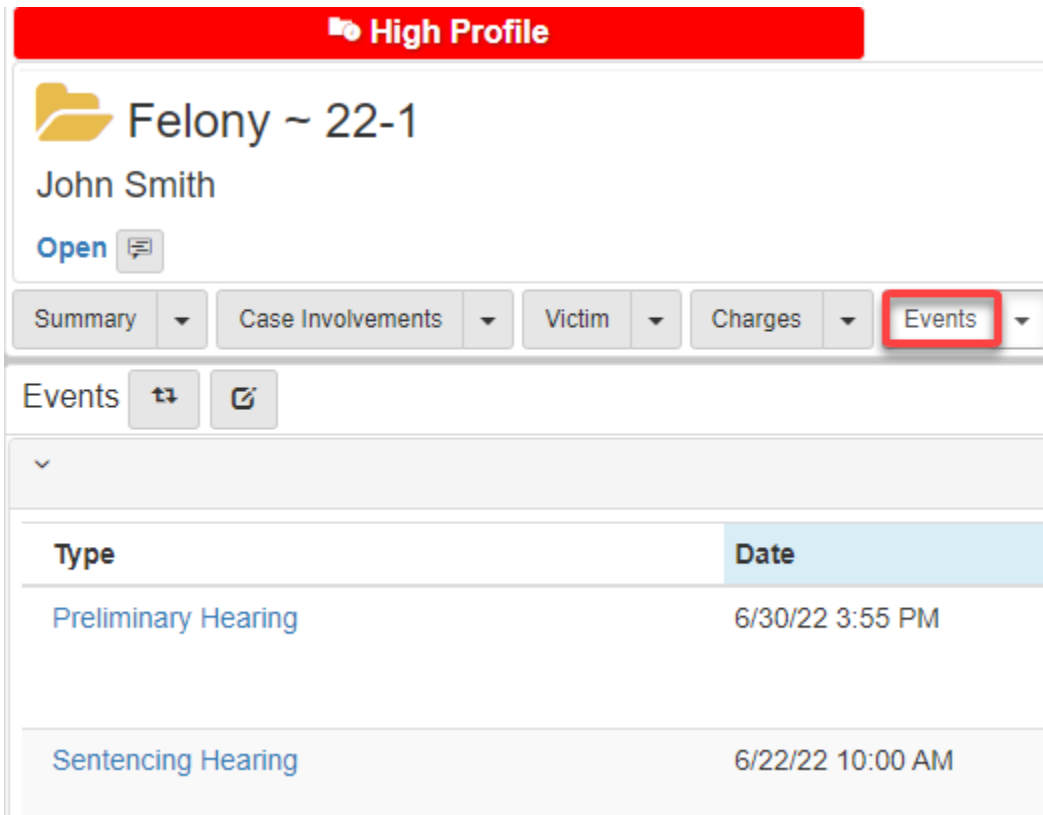
When adding charges, pleas, exhibits, or other items, a defendant must be selected from the dropdown, then fill in the required fields marked with an asterisk.



The screenshot shows a software interface with several tabs: Summary, Case Involvements, Victim, Charges, Events, and File. The 'Charges' tab is selected, and a dropdown menu is open, showing options: Add Charge, Charging, Add Plea Offer, Dispose Charges, Add Sentencing, and Relate Victims to Charges. The 'Add Charge' option is highlighted with a red box. A red arrow points to the 'Events' tab. Below the tabs, there is a form titled 'Add Charge' with a dropdown menu showing 'Add to Smith, John [DEF]' highlighted with a red box. The form has three input fields: 'Count Number*' (with an asterisk), '# of Counts', and 'Offense Date*' (with an asterisk).

Events

Events can be accessed by clicking the Events tab in the case folder view.



The screenshot shows a case folder view for 'Felony ~ 22-1' by 'John Smith'. The 'Events' tab is selected and highlighted with a red box. The 'Events' view shows a table with two columns: 'Type' and 'Date'. The table contains two rows: 'Preliminary Hearing' on '6/30/22 3:55 PM' and 'Sentencing Hearing' on '6/22/22 10:00 AM'. A red banner at the top of the case folder view says 'High Profile'.

Type	Date
Preliminary Hearing	6/30/22 3:55 PM
Sentencing Hearing	6/22/22 10:00 AM

For information on how to navigate to the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

To add an event:

1. Click the **Events** dropdown, then select **Add Event**:

The screenshot shows the 'High Profile' case interface for 'Felony ~ 22-1' involving 'John Smith'. The 'Events' dropdown menu is open, and the 'Add Event' option is highlighted with a red box. A red arrow points to the 'Events' dropdown button. Below the menu, a table lists existing events:

Type	Date
Preliminary Hearing	6/30/22 3:55 PM
Sentencing Hearing	6/22/22 10:00 AM

2. Fill in the **Add Event** screen.
3. Click [**Save**].

After the creation of an event, a user can edit and add notes. Click the **Notes** icon for an event to add a note.

The screenshot shows the 'High Profile' case interface for 'Felony ~ 22-1' involving 'John Smith'. The 'Events' table is expanded to show details for each event, including 'Related Justice Personnel' and 'Related Involvements'. Red boxes highlight the 'Preliminary Hearing' and 'Sentencing Hearing' rows, and red arrows point to the notes icon in the right column of each row.

Type	Date	Related Justice Personnel	Related Involvements
Preliminary Hearing	6/30/22 3:55 PM	Cindy Robinson [Defense Representative] Jacob Mayfield [Attorney]	Jane Smith [Witness] John Smith [Defendant] Mary Smith [Victim]
Sentencing Hearing	6/22/22 10:00 AM	Jacob Mayfield [Attorney]	Jane Smith [Witness] John Smith [Defendant] Mary Smith [Victim]

Notes added to each event are also added to the case notes. Edit an event by clicking the

Case type, which shows an editing page.

Discovery

The discovery tab under the case view shows all the discovery packets, or sharable documents, for public or external agency view. Discovery packets can be viewed by clicking the Discovery tab on the case summary screen.

High Profile

Felony ~ 22-1
John Smith
Open

Summary Case Involvements Victim Charges Events File Cabinet **Discovery**

Discovery Details

Disclosed Items

Packet Name	Effective From	Effective To	Avai
Discovery Packet	06/28/2022		no

For more information on how to navigate to the case summary screen, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

For information on creating discovery packets, see [Create](#).

For information on discovery packets, see [Discovery packets](#).

Financials

Case financials consist of three different screens:

High Profile

Felony ~ 22-1
John Smith
Open

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation Tasks

Case Summary

Future Events

Type	Date	Received
Arraignment	7/4/22 12:30 PM	Joseph Mayfield (Attorney)

Received 06/23/22
Next 07/19/22 12:30 PM Arraignment
Attorney Mayfield
Defense Robinson

- 1 Cash Receipts
- 2 Add Restitution
- 3 Time & Expense
- 4 Add Time Entry
- 5 Add Expense Entry

1. Cash Receipts.

2. Case Ledger.
3. Historic Financials.

Cash receipts

Cash receipts are used by a financial user to open and balance tills. For more information on cash receipts, refer to [Cash receipts](#).

Case ledger

In this section, individual receipts can be printed and emailed to individuals.

Fines & Fees								
Date	Fine/Fee	Party/Payor	Party Type	Reference	Amount	Paid	Balance	
01/15/21	SAFES	SAFES	Guilty/Not Guilty	Defendant	67			
Totals								

Receipts				
Date	Receipt No.	Type	Till No & Status	Amount
01/25/21	GCDA-100000005.1	Payment	10-000000000-000000000	

1. The **Case Ledger Folder View** shows the fines and fees associated with the current case.
2. Receipts for individual payments can be found under the fines and fees.

Historic financials

The **Historic Financial Folder View** shows all obligations attached to the case. The obligations show the "original amount" and "balance at conversion" (If the eAttorney instance comes from a converted database). In the list, you can find the payments and the full payment record by clicking the credit card icon (view payments) or the person icon (full payment record).

Type	Due Date	Original Amount	Balance at Conversion	Notes	Created	Last Updated
	02/15/2013				02/01/2013	02/07/2014

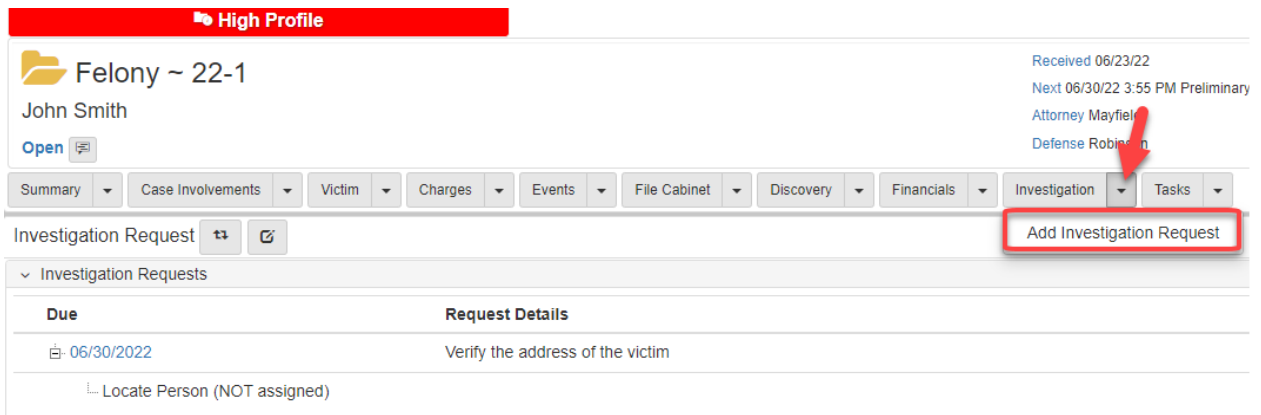
Investigation

The **Investigation Folder View** shows all investigation requests, their status, and personnel assigned to the task.

The **Investigation Folder View** can be accessed on the **Case Folder View** by clicking the **Investigation** tab.

For information on navigating to the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

Tasks can be added to the **Case** and assigned to **Directory Personnel**. Once a task is assigned to an individual, the case is added to their workspace with details about the request.

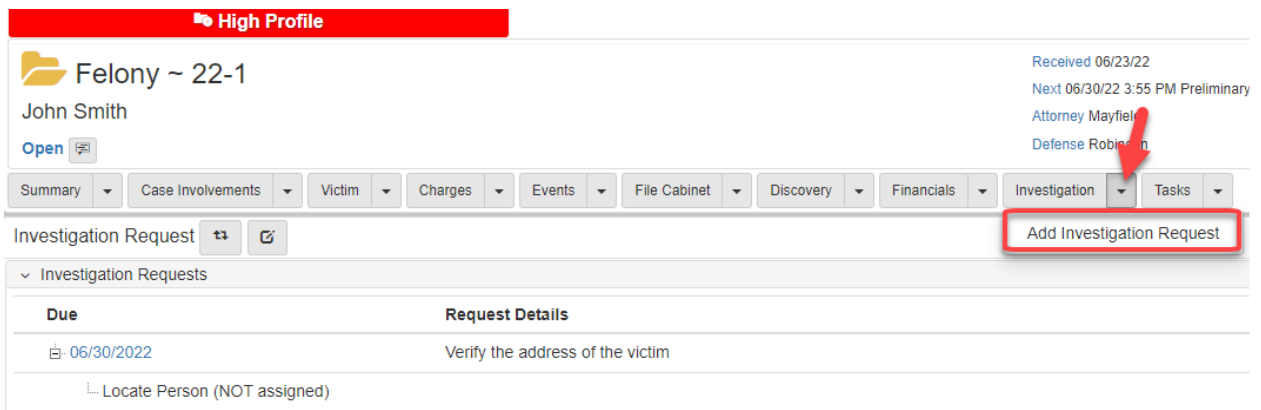


The screenshot shows the 'High Profile' case folder view for 'Felony ~ 22-1' by John Smith. The 'Investigation' tab is selected, and the 'Add Investigation Request' button is highlighted with a red box and a red arrow. The 'Investigation Requests' table below shows a request due on 06/30/2022 with the details 'Verify the address of the victim' and 'Locate Person (NOT assigned)'.

Due	Request Details
06/30/2022	Verify the address of the victim

Add an investigation request

Requests can be added by clicking the **Investigation** dropdown, then selecting **Add investigation request**. All fields denoted with a red asterisk are required. Adding a task to the request is optional.



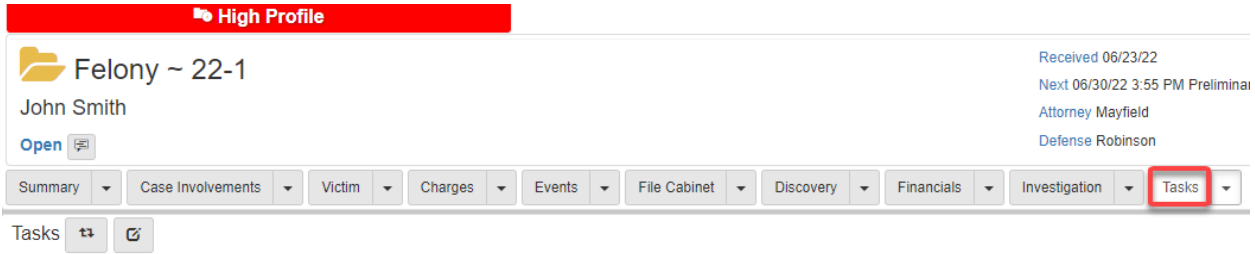
The screenshot shows the 'High Profile' case folder view for 'Felony ~ 22-1' by John Smith. The 'Investigation' dropdown menu is open, and the 'Add Investigation Request' option is highlighted with a red box and a red arrow. The 'Investigation Requests' table below shows a request due on 06/30/2022 with the details 'Verify the address of the victim' and 'Locate Person (NOT assigned)'.

Due	Request Details
06/30/2022	Verify the address of the victim

Once a request is made it can be assigned to an individual.

Tasks

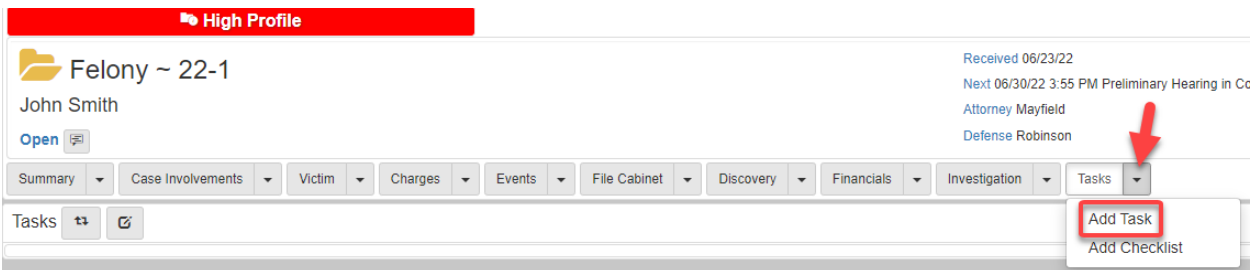
Tasks can be added to a case and assigned to an individual. To navigate to the tasks from the case view, click the **Task** tab:



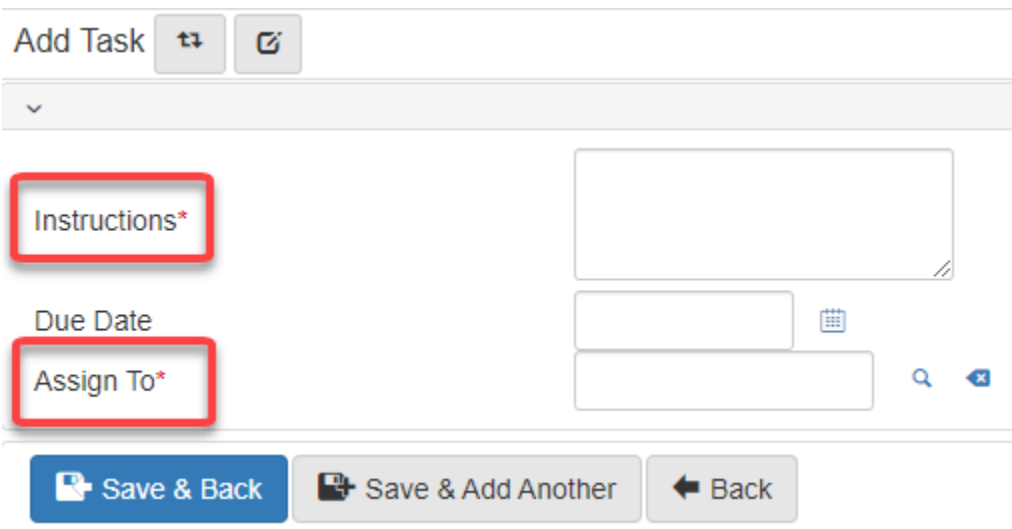
For information on how to navigate to the **Case View**, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

Add a task

To add a task, click the **Tasks** dropdown, then click **Add Task**:



In the **Add Case Task** screen, the required field to save is **Instructions**. Instructions are shown to the assigned user in their corresponding workspace:

A screenshot of the "Add Task" form. The form has a title "Add Task" with a refresh icon and a share icon. Below the title, there are three required fields, each with a red box around it: "Instructions*" (a large text area), "Due Date" (a date picker), and "Assign To*" (a search field with a magnifying glass icon and a dropdown arrow). At the bottom of the form, there are three buttons: "Save & Back" (blue), "Save & Add Another" (grey), and "Back" (grey).

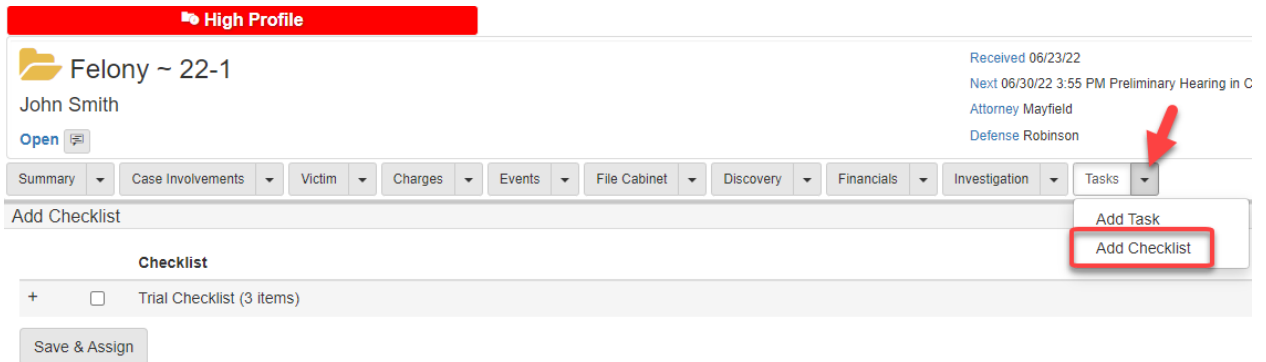
Updating the assignment also updates the assigned user in the workspace. You can also update the assignment from the workspace. When complete, select **complete** to remove the workspace item, or use the **Done** result from the workspace.

Checklists

Checklists are a set of tasks and are configured by an administrator.

Add a checklist

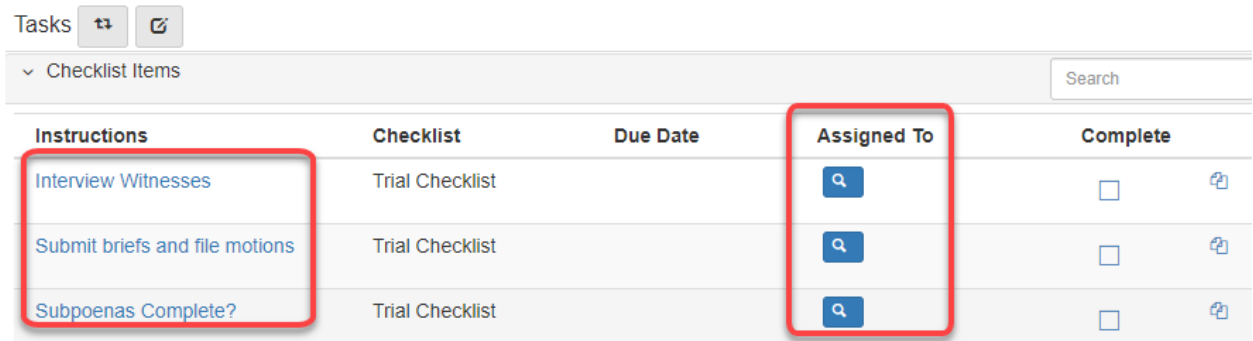
To add a checklist, click the **Tasks** dropdown, then click **Add Checklist**:



The screenshot shows a user interface for a legal case. At the top, there is a red bar with 'High Profile'. Below it, the case name 'Felony ~ 22-1' and 'John Smith' are displayed. A navigation bar contains various tabs like 'Summary', 'Case Involvements', 'Victim', 'Charges', 'Events', 'File Cabinet', 'Discovery', 'Financials', 'Investigation', and 'Tasks'. The 'Tasks' dropdown is open, showing 'Add Task' and 'Add Checklist' options. The 'Add Checklist' option is highlighted with a red box. Below the dropdown, there is a 'Checklist' section with a 'Trial Checklist (3 Items)' and a 'Save & Assign' button.

Use the **Add Checklist** screen to select all the checklist items or elements to add. Checklists do not allow duplicate items to exist on a case.

For example, a user adds item 1 to a checklist and clicks [**Save and Assign**]. Item 1 cannot be added a second time to the case.



The screenshot shows a table titled 'Checklist Items' with a search bar. The table has five columns: 'Instructions', 'Checklist', 'Due Date', 'Assigned To', and 'Complete'. There are three rows of data. The 'Assigned To' column for each row contains a search icon, which is highlighted with a red box. The 'Instructions' column for the first row is also highlighted with a red box.

Instructions	Checklist	Due Date	Assigned To	Complete
Interview Witnesses	Trial Checklist		🔍	<input type="checkbox"/>
Submit briefs and file motions	Trial Checklist		🔍	<input type="checkbox"/>
Subpoenas Complete?	Trial Checklist		🔍	<input type="checkbox"/>

Communication

The communication tab has all documented communication between legal personnel and involvements. Communications can be accessed by clicking communications on the case folder view.

Documents have not finished converting for this case. Financials conversion items remain to be processed.

432B ~ 12-1
2011-6
Open

Received 01/23/08
Next N/A
Attorney N/A
Defense N/A

Admin

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation Tasks **Communication**

NC Financials Reports

Communication Add Item More Actions

Type	Date	Related Justice Personnel	Related Involvements
Phone	5/17/12 2:03 PM		The Silver Flame Marcellus

Add Item More Actions

For information on how to access the case view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

The main display for the communications tab displays all the documented communications added to the case. To add an item, select the add item on top or bottom of the page:

Documents have not finished converting for this case. Financials conversion items remain to be processed.

432B ~ 12-1
2011-6
Open

Received 01/23/08
Next N/A
Attorney N/A
Defense N/A

Admin

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation Tasks **Communication**

NC Financials Reports

Communication **Add Item** More Actions

Type	Date	Related Justice Personnel	Related Involvements
Phone	5/17/12 2:03 PM		The Silver Flame Marcellus

Add Item More Actions

Add item

When adding an item, a communication type must be selected, for example Fax, Letter, or Phone. A date can be added to document the day and time of occurrence, and notes and involved personnel:

Add Communication ?

Type*

Date

Communication

Related Justice Personnel

- [Deputy]
- [Nevada State Deputy Publ
- [Deputy]
- [Judge]

Related Involvements

- The Silver Flame Marcellus [Executive Legal Assistant]
- Loviatar Bernardo [Juvenile Defendant]
- Skerrit Reynaldo [Mother]
- The Fury Malcolm [Father]
- Skerrit Reynaldo [Victim]
- Onatar First Witch [Petitioner]
- Olidammara Second Witch [Guardian]

[+ Related Involvements](#)

Save & Back Save & Add Another Back

Non-collectible financials

The **Non-collectible Financials Folder View** shows all non-collectible financials with their type, date, alleged amount, ordered amount and status.

Misdemeanor Class A ~ 21-506

Vader, Darth

Count 1 22.07(c)(2) TERRORISTIC THREAT AGAINST PU...

Open

Received 01/13/21
Next N/A
Attorney N/A
Defense N/A

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation Tasks Communication **NC Financials** Reports

Non Collectible Financials More Actions

Type	Date	Alleged Amount	Ordered Amount	Status
Cash Bond	01/15/2021	100.00	100.00	Posted

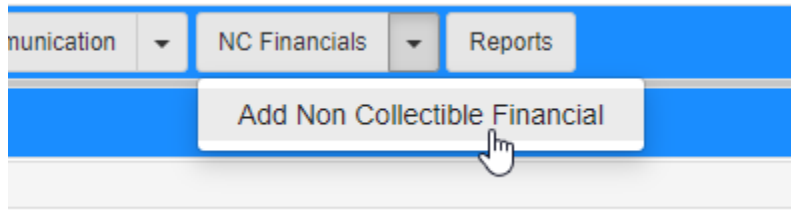
The **Non-collectible Financials Folder View** can be accessed on the **Case Folder View** by clicking the **NC Financials** tab. For information on navigating to the case folder view, refer to

<https://documentation.journaltech.com/eAttorney/user/cases/index.html>.

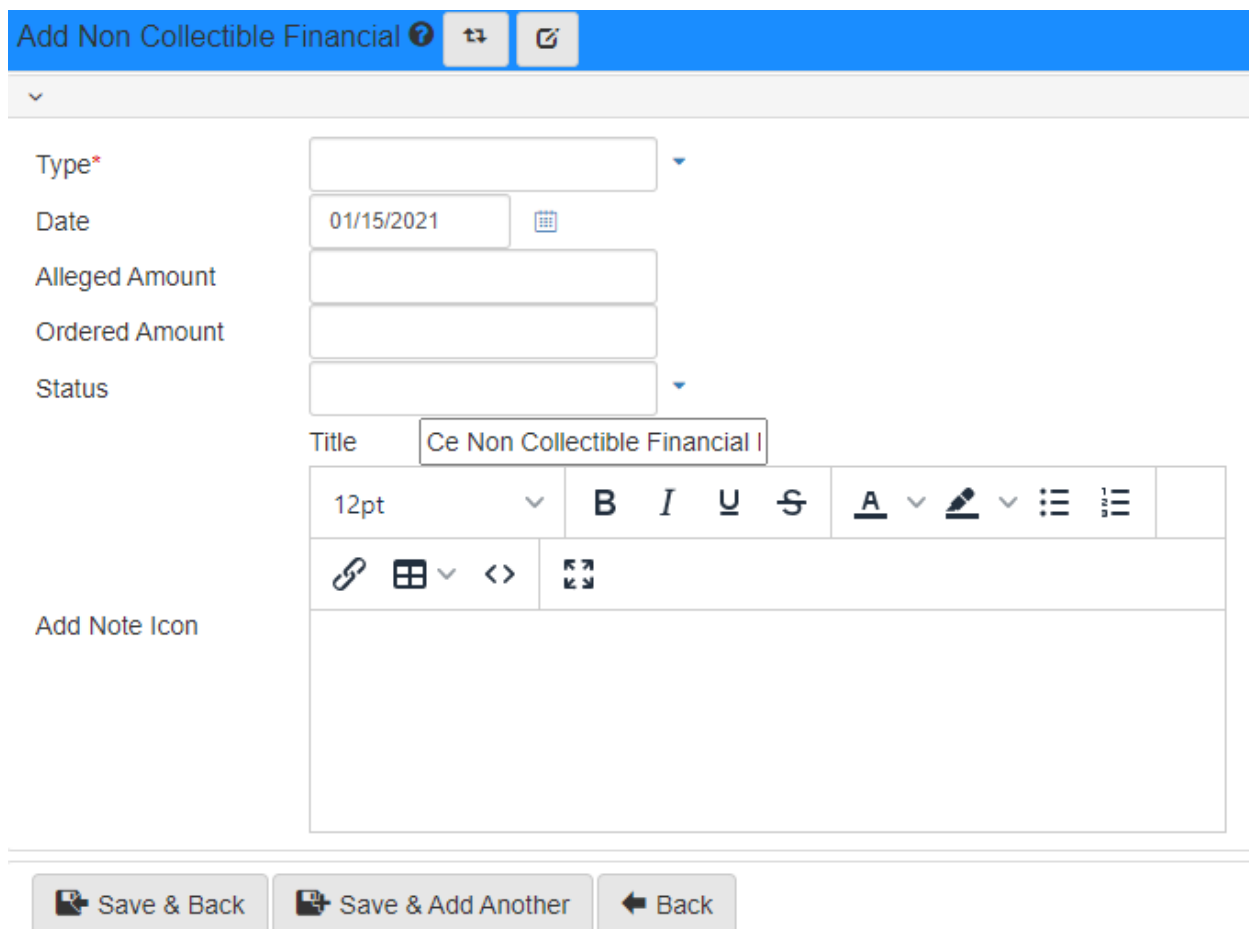
Click a value in the **Type** on a row to edit that non-collectible financial.

Add a non-collectible financial

To add a non-collectible financial, click the **NC Financials** dropdown and select **Add Non collectible Financial**:

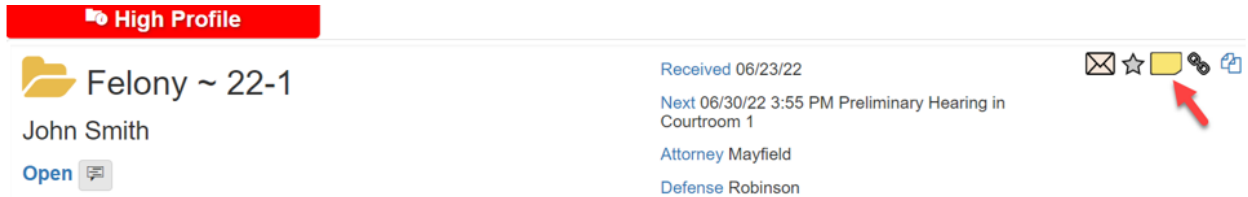


All fields with a red asterisk are required.

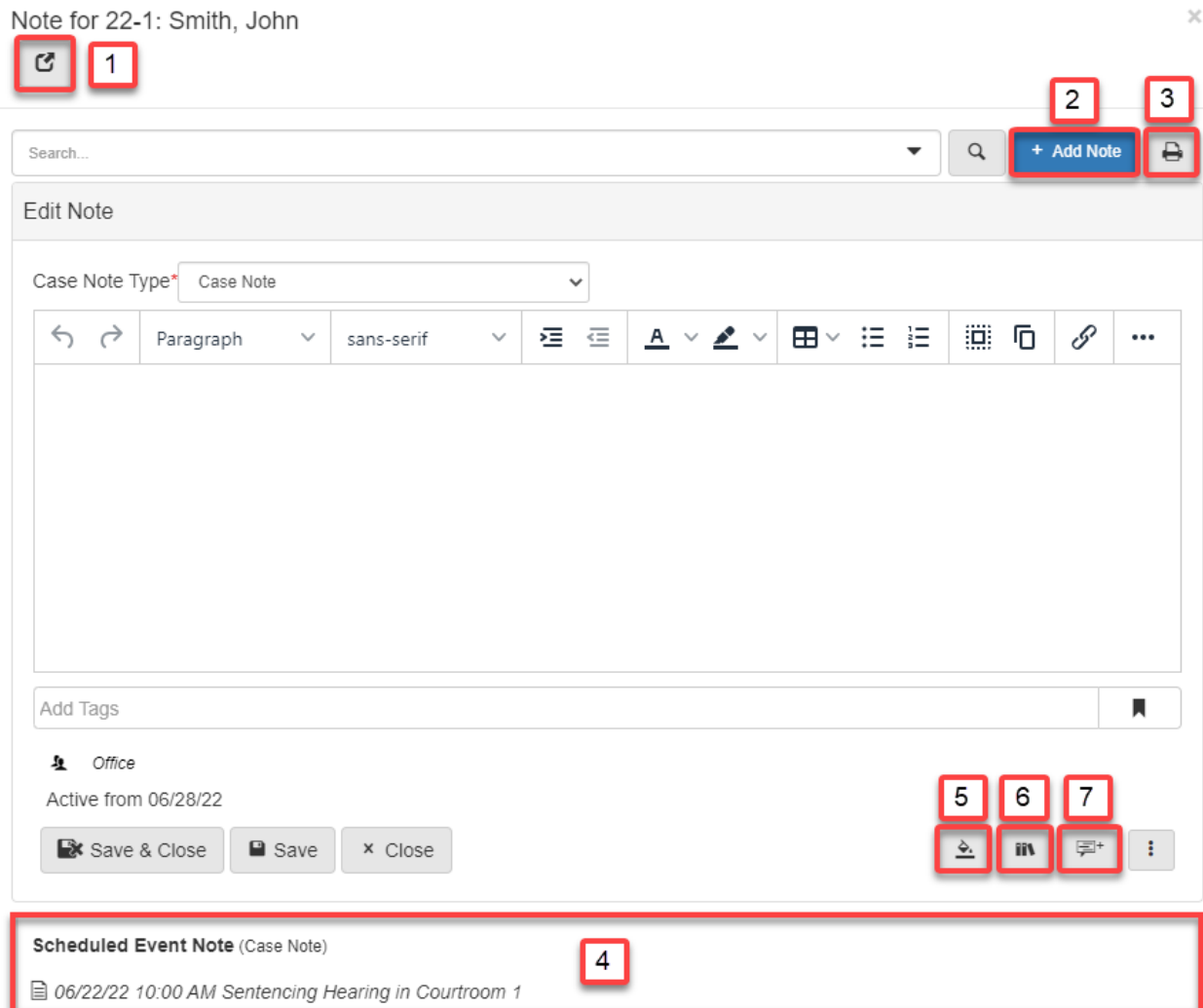
A screenshot of the 'Add Non Collectible Financial' form. The form has a blue header bar with the title 'Add Non Collectible Financial' and two icons. Below the header, there is a dropdown arrow. The form fields are: 'Type*' (required), 'Date' (01/15/2021), 'Alleged Amount', 'Ordered Amount', 'Status', 'Title' (Ce Non Collectible Financial I), and 'Add Note Icon'. The 'Add Note Icon' field has a rich text editor toolbar with options for font size (12pt), bold (B), italic (I), underline (U), strikethrough (ABC), text color (A), background color (brush), bulleted list, and numbered list. At the bottom of the form, there are three buttons: 'Save & Back', 'Save & Add Another', and 'Back'.

Case notes

Case notes can be accessed and added by clicking the page icon in the upper right hand corner of the case folder view. For information on how to navigate to the case folder view, see <https://documentation.journaltech.com/eAttorney/user/cases/index.html>.



Once clicked, a dialog is displayed with options to add, print, and edit notes:




1. Closes dialog and launches case notes in a new browser tab.
2. Adds a new note on case.


3. Launches a printable screen of case notes in browser.
4. Clicking a case note enables editing.
5. Choose note background color.
6. Add note macro.
7. Set active dates for note.

Person

In eAttorney, there are two types of people: a person and directory person. A directory person is someone working in the judicial system, including law enforcement, legal personnel, and judges. A person is anybody who is a defendant or involvement. In eAttorney, a person is denoted by a single-person icon:

Defendant	
Type	Person
Defendant	Smith, John 

A directory person is denoted by a double-person icon:


Justice Personnel	
Role	Person
Attorney	Mayfield, Jacob 

To access the person folder view, click the person icon, or click a person in the Person/Business search.

The person view is split into five different sections:

1. Summary - Gives basic information on the selected individual, for example First Name, Last Name, DOB, and Address.
2. [Filing cabinet](#).
3. <https://documentation.journaltech.com/eAttorney/user/person/relationships.html>.
4. https://documentation.journaltech.com/eAttorney/user/person/historical_financials.html.
5. [Person reports](#).

The summary folder view shows all general information about the individual:



John Smith

Date Of Birth 06/5/90 Ethnicity White

Eye Color Brown Gender Male

Hair Color Brown Height 600

Primary Language English Weight 200

Summary ▾ Case Involvements File Cabinet ▾ Relationships ▾ Notes ▾

Person Summary ↔ 📄

▼ Name

First Name	Last Name	Middle Name	Status
John	Smith		Active

▼ Address

Address Type	Address	City	State
Residence	1234 Brooklyn Street	New York	New York

▼ Telephone

Telephone Type	Telephone Number	Status
Cell	(123) 456-7890	Active

▼ Contact



Contact Type	Contact	Status
Email Personal	jsmith@example.com	Active

▼ Identification


Identification Type	Identification Number
DL # (New York)	123-456-789

Create


A **Person** can be created while adding defendants or involvements to a **Case**. Click **[+]** to create a new **Person**:


Add Adult Case  

Case Information




Received Date* 


Case Type*

Status* 

Status Date* 



Defendant




Person*   

Custody Status* 

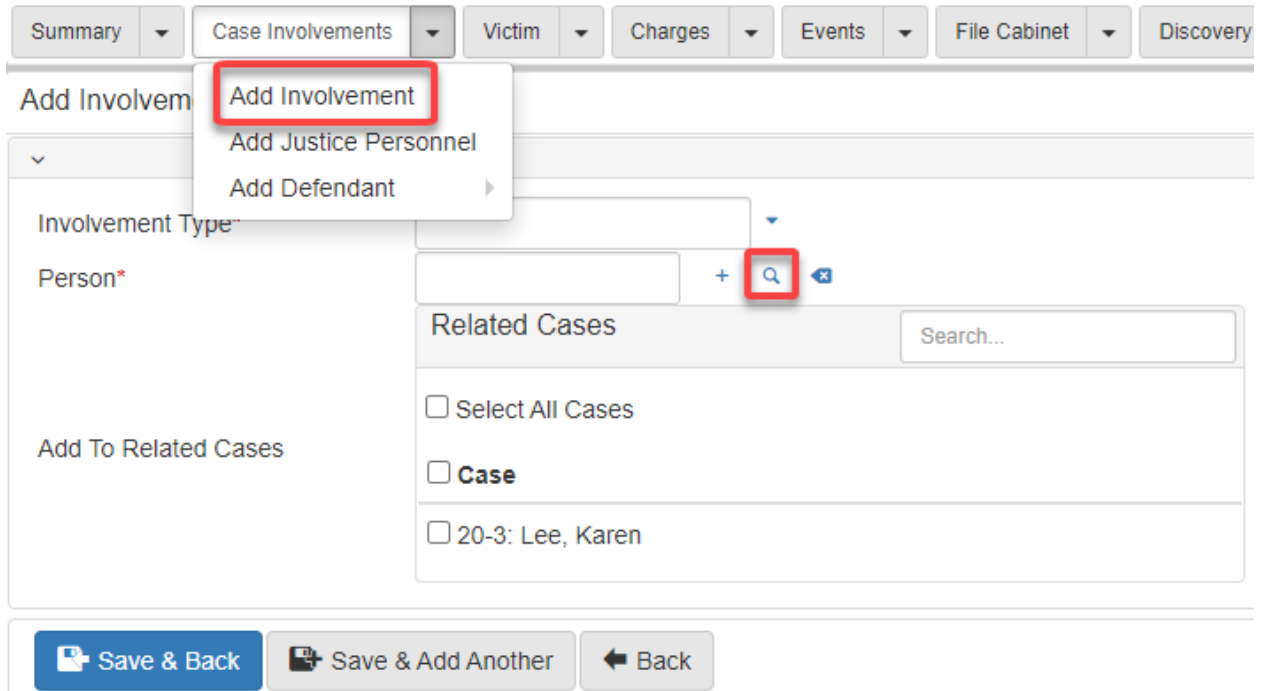
Law Number

Number

Agency  

 Save & Open  Save & Add Another  Back

After saving, you can add a **Person** to cases. Click the **Search** icon and find the stored person:



Delete

Deleting a person can be done using the person folder view (accessed by clicking the person icon in a case view):

1. Click **Summary** > **Update Person**.
2. Click "Delete Record" in the bottom right corner of the screen:

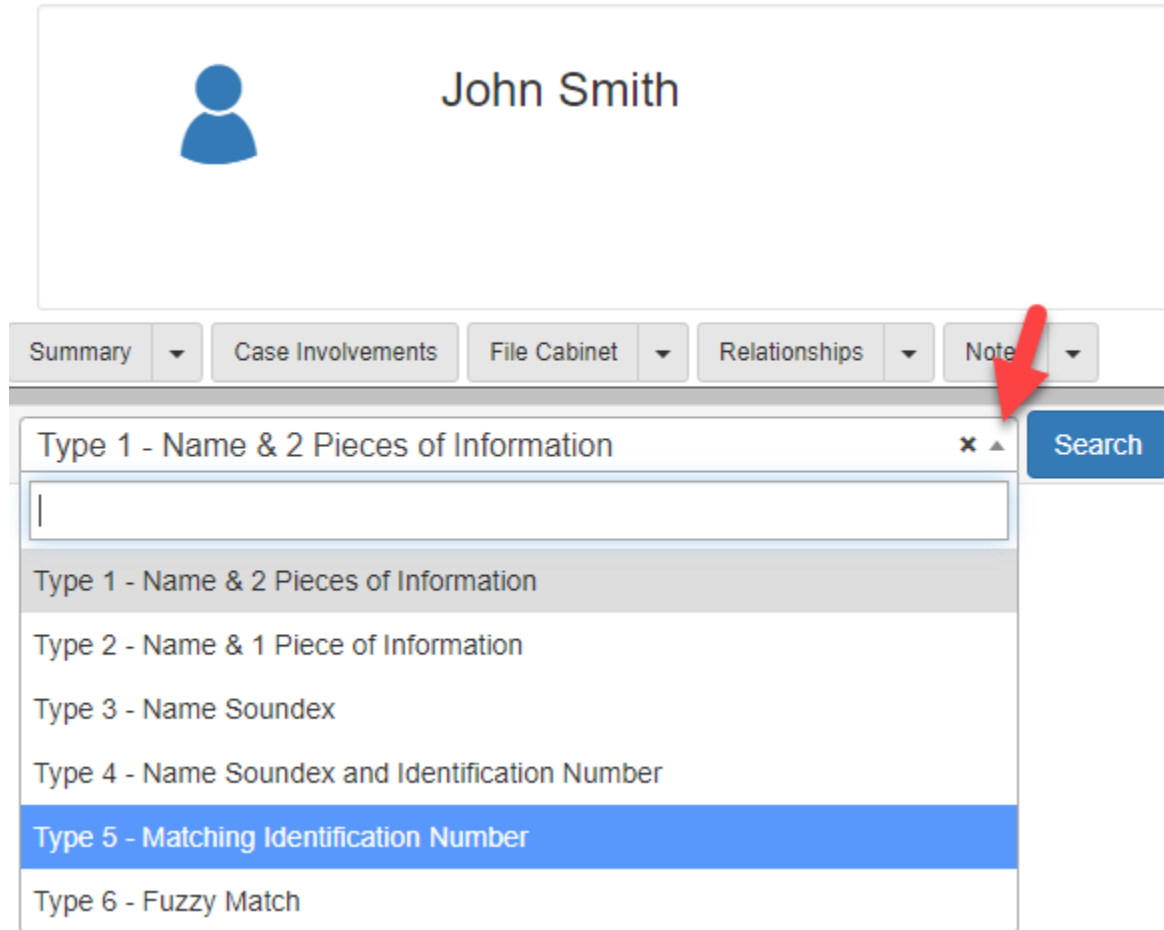
Merge

When multiple records of the same person exist in the system, those records can be merged into one person record. Merging person records can be done in the person folder view, under the **Summary > Person Merge**. To merge person records, a search level needs to be set to match potential duplicate records:

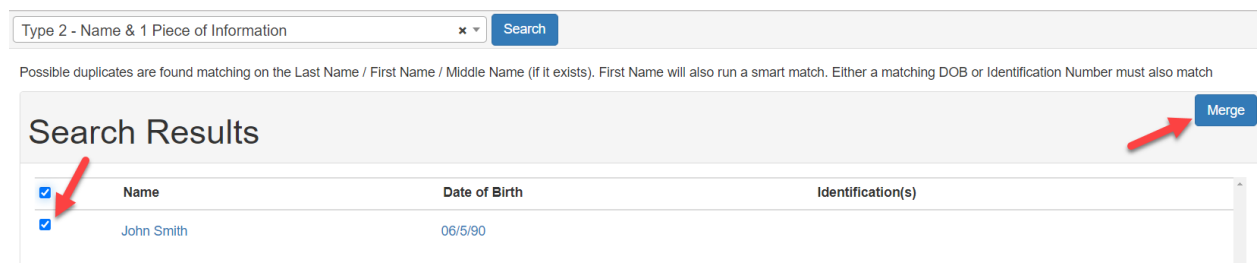
Level
Search criteria
Level 1
Matching first and last names
Level 2
Matching first, last, and middle names
Level 3
Matching first, last names, and date of birth

Once the search is complete, person records can be selected based on search criteria and

merged together by clicking [merge].



After selecting people and clicking merge, a merge confirmation opens to ensure that no errors have occurred:



After confirmation, the two records are combined into one.

Historical Financials

The **Historic Financials** screen shows payments made to an obligation by an individual and information about the payment: payment type, amount, reference number, date received, and receipt number.

Show the **Historical Financials** screen by clicking the **Historic Financials** tab in the **Person Folder View**. For information on how to navigate to the **Person Folder View**, refer to <https://documentation.journaltech.com/eAttorney/user/person/index.html>.

Click the view allocation button (#1) to expand the **Payment Details** dialog, showing the obligation type and case number associated with the fine/fee:



For more information on financials, refer to [Financials](#).

Relationships

Relationships on individuals can be added on the person folder view to show relationships between involvements. The inverse section can also be added to reflect and save the inverse relationship on the counterpart.

Update Relationship

Relationship

This Name Smith, John

Related Name* Smith, Jane

Type* Start Date

Sub Type* End Date

Inverse

Type* Start Date

Sub Type* End Date



Save & Back Back

Summary



In eAttorney, there are two types of people:

- *Directory Person*: is someone working in the justice system, including law enforcement, legal personnel, judges.
- *Person*: a defendant or involvement.

In eAttorney, a Directory Person is denoted by a double person icon:

Role	Person
Attorney	Mayfield, Jacob  

A Person is denoted by a single person icon.

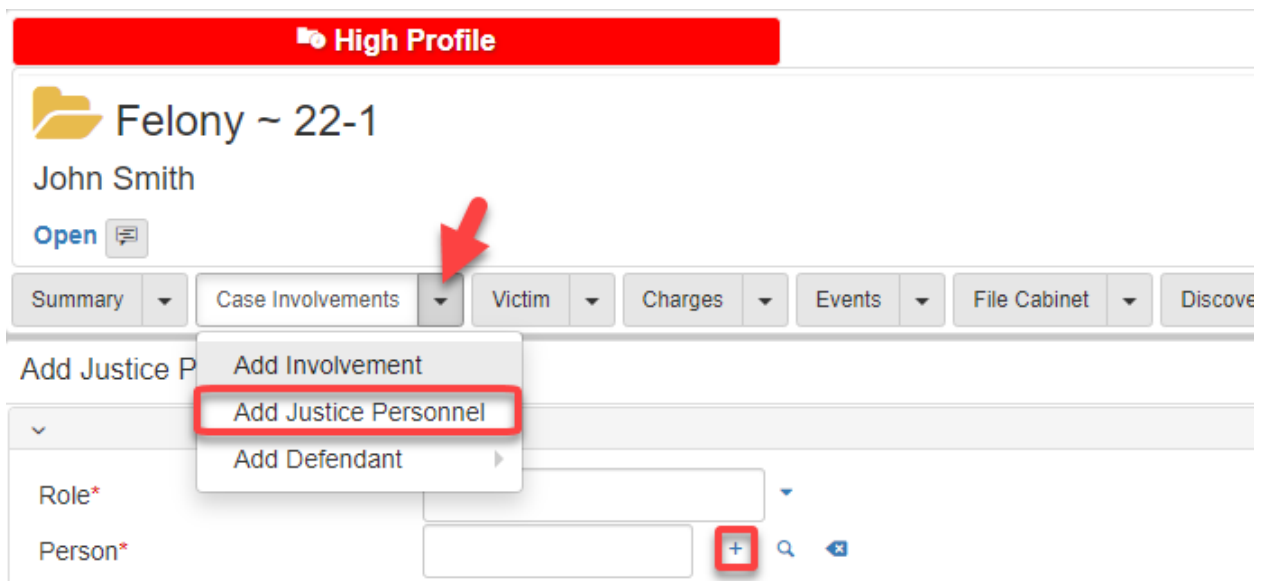
Type	Person
Defendant	Smith, John  

A Directory Person is also able to be assigned to cases. If a Directory Person is assigned to a case, the case shows in the user work space where they are able to see details and tasks on the case.

To access the Directory Person folder view, click the double person icon on a case, or use **Search Justice Personnel** in the search menu in the left navigation pane.

Create

A directory person can be created in the case view under **Case Involvements > Add Justice Personnel**. Click the "+" button on the person field in the Add Justice Personnel screen:



The screenshot shows a case view for 'Felony ~ 22-1' by John Smith. A navigation bar includes 'Summary', 'Case Involvements', 'Victim', 'Charges', 'Events', 'File Cabinet', and 'Discover'. The 'Add Justice Personnel' dialog is open, with a dropdown menu showing 'Add Involvement', 'Add Justice Personnel' (highlighted with a red box), and 'Add Defendant'. Below the dialog, the 'Role*' and 'Person*' fields are visible, with a red box highlighting the '+' button next to the 'Person*' field.

A dialog opens where you can fill out the information required to save a directory person.

Add Justice Personnel



Role*

Person* + 🔍 🗑️

Associated Organization 🔍

Date Assigned* 📅

Status*

Add To Related Cases

Related Cases

Select All Cases

Case

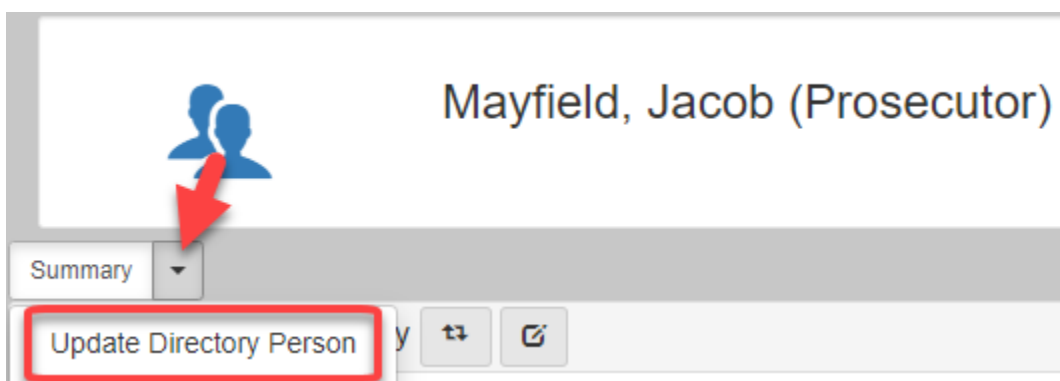
20-3: Lee, Karen

20-2: Lee, Karen

Update

To update a directory person record:

1. Navigate to the **Directory Person Folder View**.
2. Click a directory person.
3. Click the **Summary** dropdown, then select **Update Directory Person**.



You can change roles, name, email, address, telephone, add files, add person to organizations, and do other actions.

Involvements

To view the involvements on a Directory Person, from the Directory Person folder view click **Summary > View Involvements**.



The *View Involvements* page displays the attached cases to the Directory Person and the role, type, number, and status of each case.

Search Justice Personnel Involvements

Directory Person Robinson, Cindy (Defense Representative) Role

Search Reset Refine Output 25 per page

Results 1 - 1

<input type="checkbox"/>	Role	Date Assigned	Case Type	Case Number	Case Status	Case Name
<input type="checkbox"/>	Defense Representative	06/23/2022	Felony	22-1	Open	Smith, John

Results 1 - 1

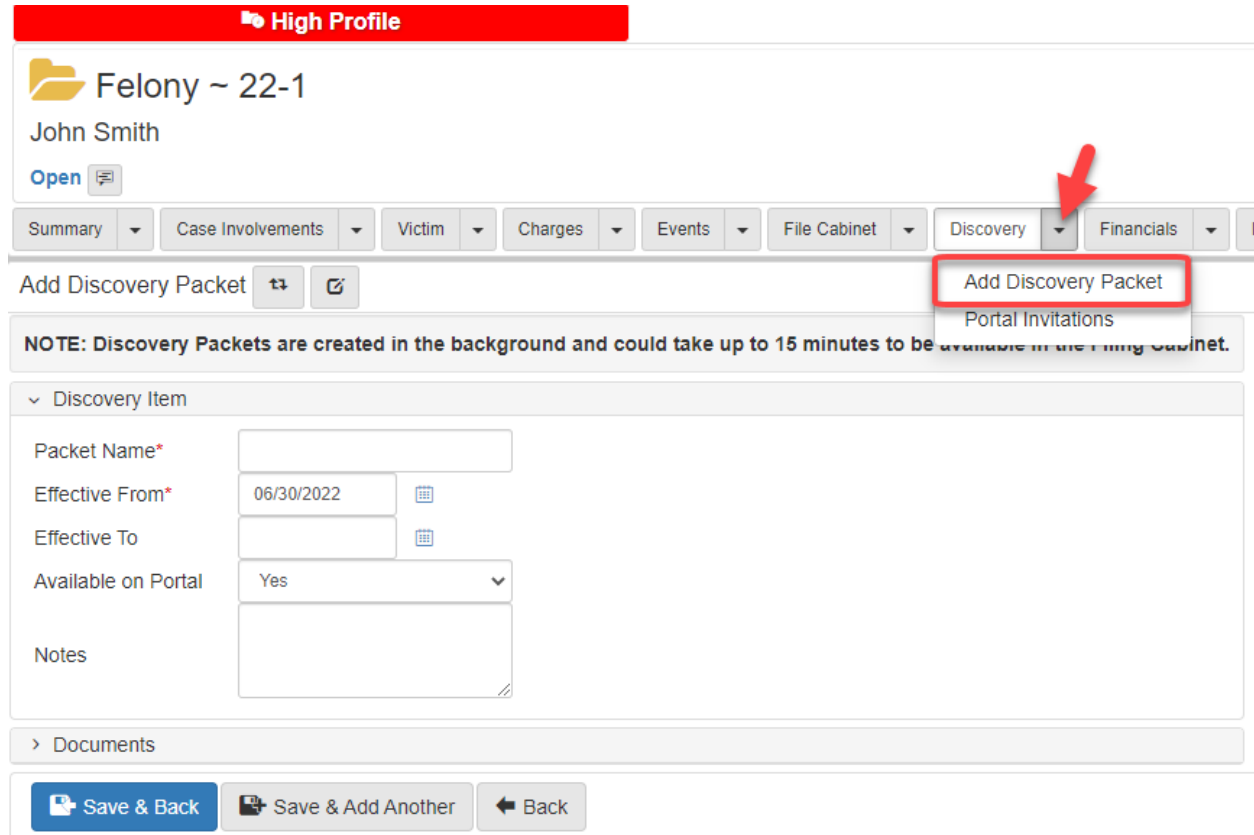
Excel PDF Archive

Discovery packets

Discovery Packets are Zip files that can be shared between agencies and people. In eAttorney discovery packets are shared using the portal. The eAttorney system creates invites and sends emails to the end user inviting them to the portal instance. The invites are revalidated at the server end and all individuals that have permissions are able to access discovery packets on the case level.

Create

Create a discovery packet with the case folder view by clicking **Discovery > Add Discovery Packet**.



The screenshot shows a case folder view for 'Felony ~ 22-1' by John Smith. A red bar at the top indicates 'High Profile'. Below the case name is an 'Open' button. A navigation bar contains tabs for Summary, Case Involvements, Victim, Charges, Events, File Cabinet, Discovery, and Financials. The 'Discovery' tab is selected, and a dropdown menu is open, showing 'Add Discovery Packet' (highlighted with a red box and arrow) and 'Portal Invitations'. Below the navigation bar is a 'NOTE: Discovery Packets are created in the background and could take up to 15 minutes to be available in the filing cabinet.' A 'Discovery Item' form is visible, with fields for Packet Name*, Effective From* (06/30/2022), Effective To, Available on Portal (Yes), and Notes. At the bottom are buttons for 'Save & Back', 'Save & Add Another', and 'Back'.

For information on case navigation, see [Cases](#).

On the add discovery packet page: - All fields with a red asterisk are required. - An effective to date can be added to limit the time the packet is available. If no time is selected the packet does not expire. - Documents can then be selected and are stored as a Zip file.



Documents must be marked as approved for disclosure before a document can be added to a discovery packet. For information on how to mark a document approved, see [Filing cabinet](#).

Documents

There are many ways to interact with documents in eAttorney. This section covers the filing cabinet usage on Case and Person views, plus the document manipulation tools. Document tools include printing, scanning, stamping, signing, redacting, emailing, and annotating.

Filing cabinet

The https://documentation.journaltech.com/eAttorney/user/documents/file_cabinet.html allows users to add, update and edit documents in the Case or Person views.

Document generation

<https://documentation.journaltech.com/eAttorney/user/documents/generation.html> allows users to generate documents based on document templates. These templates can be automated or allow user input to change the content of the template.

Document viewer

The <https://documentation.journaltech.com/eAttorney/user/documents/viewer.html> makes it easy to review, stamp, redact, sign and annotate uploaded documents in the filing cabinet.

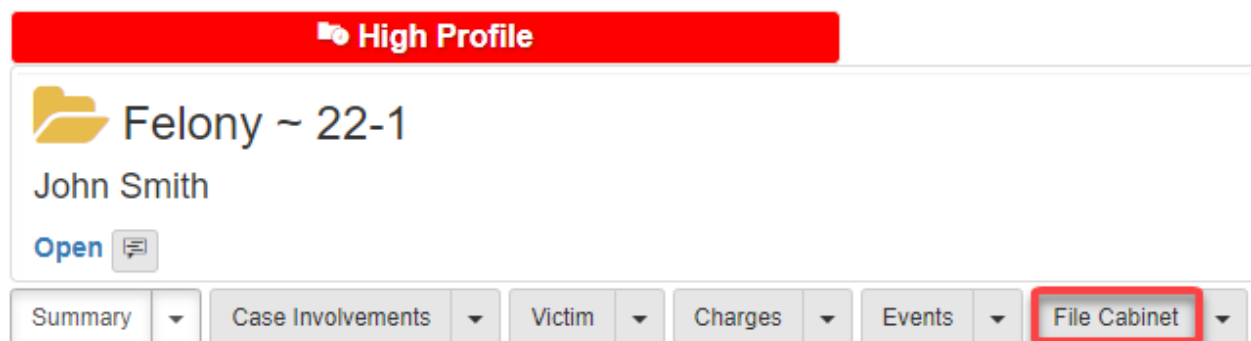
Document scanning

<https://documentation.journaltech.com/eAttorney/user/documents/scan.html> allows the user to scan documents into a Case or Name filing cabinet.

Filing cabinet

This section describes the **File Cabinet** and its features. This includes the **Case File Cabinet** and the **Person File Cabinet**.

The **File Cabinet** can be accessed from a **Case** or **Person** view with the tabs under the view header:



File cabinet dropdown options: case and person

High Profile

Felony ~ 22-1
John Smith
[Open](#)

Summary | Case Involvements | Victim | Charges | Events | **File Cabinet** | Discovery | Financials | In

Case Summary | Future Events

Type	Date	Related Justice Person
Preliminary Hearing	6/30/22 3:55 PM	

File Cabinet | Relation

Add Person File(s)

1 Add Case File(s)
2 Generate Template
3 Document Viewer
4 Add Document Seal
5 Utilities
6 Bates Stamp
7 Merge Documents
8 Approve for Disclosure

1. **Add Case File(s)** or **Add Person File(s)**: Open the corresponding form to insert a new file.
2. **Generate Template**: Open the generation form to select and generate a document from a template. Refer to <https://documentation.journaltech.com/eAttorney/user/documents/generation.html> for more information.
3. **Utilities**: Expand to access **Utilities**.
4. **Bates Stamp**: Bates stamp your document.

Bates Stamp

Stamp Location: Top Left (TL) | Stamp Type: Default

Name	Date Created	View	Log
<input type="checkbox"/> Unknown Document (OWASP_Application_Security_Verification_Standard_4_0_2_en3220448081224638252.pdf)	12/14/20	View	Log

[Stamp](#)

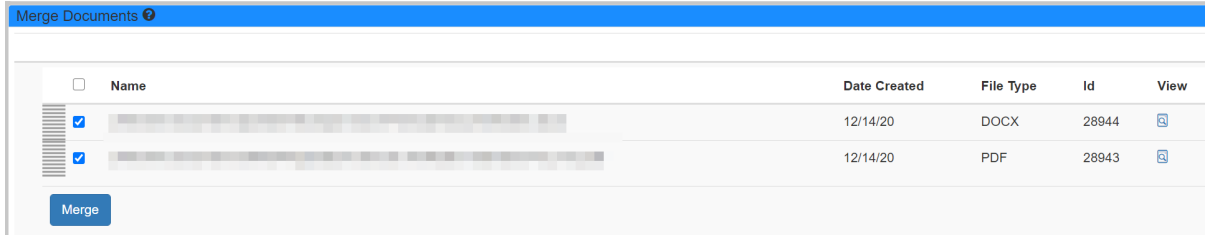
Select your stamp location and the documents to apply the stamp to, then click **[Stamp]**.



Documents must be a PDF and have the Review Status set to **Approved** for **Disclosure** to show on the list.

Once a document has received a Bates stamp, it cannot be stamped again.



5. **Merge Documents:** Merge documents. You can merge unrelated doc types to result in a PDF.



6. **Document Viewer:** View and edit a full preview of a selected file. Refer to <https://documentation.journaltech.com/eAttorney/user/documents/viewer.html> for more information.
7. **Status:** Limit results to selected statuses.
8. **Received Date From/To:** Limit results to date ranges.

Add file dropdown

The **Case Add File** and **Person Add File** forms are nearly identical. This section covers the **Case Add File** form controls. The same principles can be applied to the **Person Add File** form.

Add Case File(s)  

Type*

Select File(s)

Related Cases

Add To Related Cases

Select All Cases

Case

20-3: Lee, Karen

20-2: Lee, Karen

▼ Note

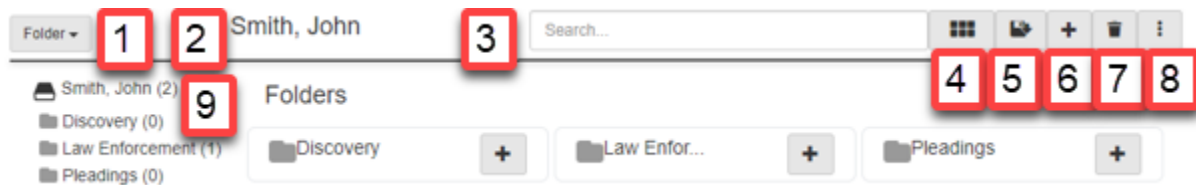
Title

Paragraph ▼ System Font ▼

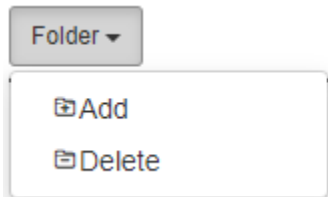
Note Macros

1. **Type:** set the **File Type**. This is unrelated to the file extension, for example **.pdf**.
2. **Date Filed:** set a filing date for the document. Select a date from the calendar dialog.
3. **Status:** set the document status.
4. **Location:** set a physical location or identifier for the document. This field only shows on the **Case Add File** form.
5. **Category:** set a document category.
6. **Select File(s):** By clicking [**Add Files**], you can add one or more files to the case with the same attributes you are currently entering. To select multiple files, in the dialog File Selection window, use the **Shift** or **Control** keys while selecting rows. Press and hold **Shift** to select a contiguous range of files. Press and hold **Control** to select individual files.
7. In the **Note** panel, **Title:** set a title for the **Note**. This field only shows on the **Case Add File** form.
8. In the **Note** panel, **Content:** set the content for the **Note**. The Notes section on the **Case Add File** form can have style, sizing, and highlighting applied. The Notes section on the **Person Add File** form only supports a plain text **Note**.

File cabinet controls



1. **Folder:** Add or delete a directory.



2. **File Name:** The selected filename. If no file is selected, the case or person name shows here.
3. **Search:** Filter the files based on search criteria.
4. The **List/Grid** icon: Swap between List view and Grid view.
5. The **Disk down arrow** icon: Download the selected documents. You can [**Control + Click**] to select more than one document.
6. The **Plus** icon: Add a document to the file cabinet. A document selection dialog opens to allow you to select a document from your machine.
7. The **Trashcan** icon: Delete the selected documents from the file cabinet.
8. The **Vertical Ellipses** icon: Shows a dropdown with more file actions. Move a document to a new folder or update the document definition of this document type.



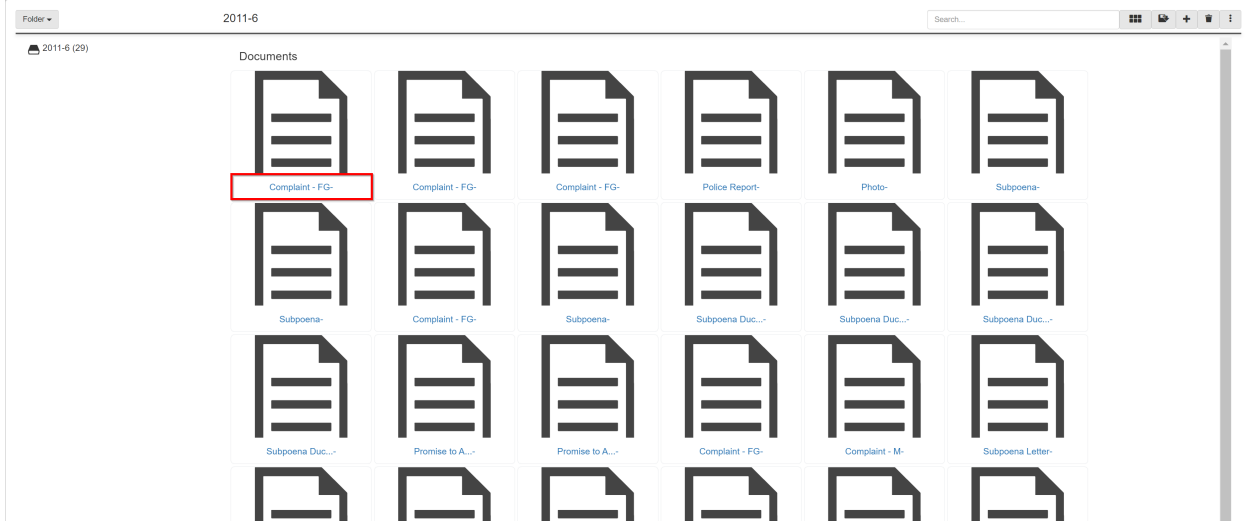
For more information, refer to [Document definitions](#).

9. **Directory Structure:** The directory structure shows the files and folders in this **File Cabinet**. The parenthesis indicates the number of files in the file cabinet.

Update or edit file

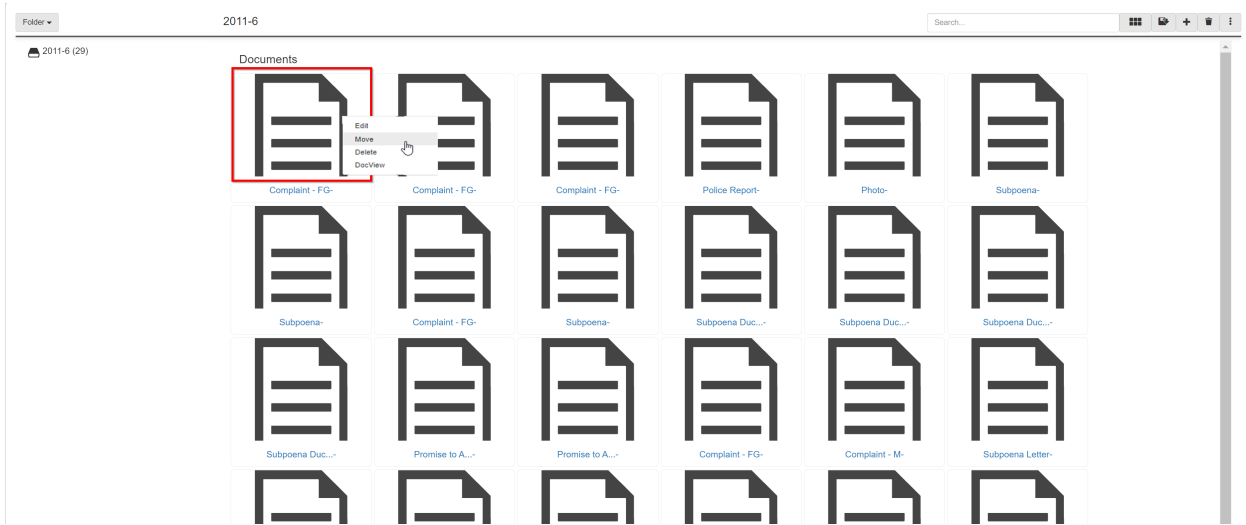
Files can be updated by clicking the thumbnail name (when in thumbnail view), then change

the type, file, and filename.



File context menu

Right-click a document thumbnail to open a context menu. The context menu allows you to move, edit, delete, and view the document.



Document generation

Document Generation allows a user to generate documents from templates. These templates can be stand-alone without user input or require input from the user to finish generation.

1. **Form** - Select the form you wish to generate from the dropdown.
2. **Add** - Add a document to the Case or Person Filing Cabinet.
3. **Preview** - Download a document for preview.

When generating a template, you have the choice to **[Add]** or to **[Preview]** the document.

If **[Add]** is chosen, the document generates and saves to the filing cabinet of the Case or Person record you are viewing. If **[Preview]** is chosen, an example of the file which should be added is downloaded to your computer so you can examine the document before it is added to the filing cabinet.

If a template requires user input or has dialogs, the user must enter data in a dialog pop-up.

JDA Dialogs ×

Select the Victim, Witness or Officer

Victim/Witness/Officer

Select Event

Finish

	Type	First Name	Last Name
<input type="radio"/>	Victim	Augustus	Gloop
<input type="radio"/>	Witness	Mini	Mouse
<input type="radio"/>	Witness	Scary	Terry

Next

Once the user has finished entering the required data, the document should be available in the Filing Cabinet.

If the template requires no input from the user, the template generates and saves to the filing cabinet without further interaction from the user.

Document scanning

Document scanning allows a user to scan documents to a **Case** or **Person** record.

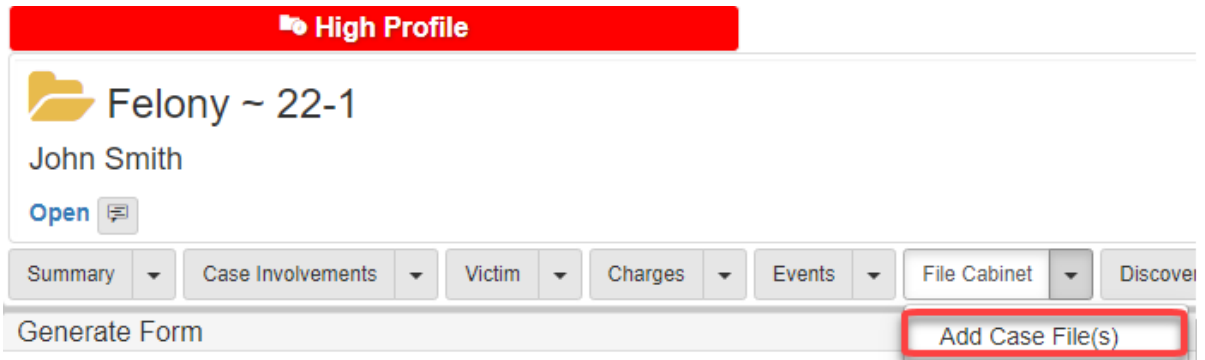


The scanning app requires Java 8 to be installed.

Application

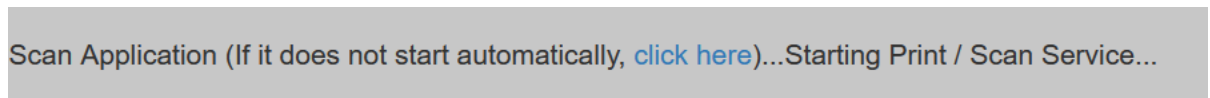
To start a scan:

1. Click the **File Cabinet** dropdown, then select **Add Case File(s)**.

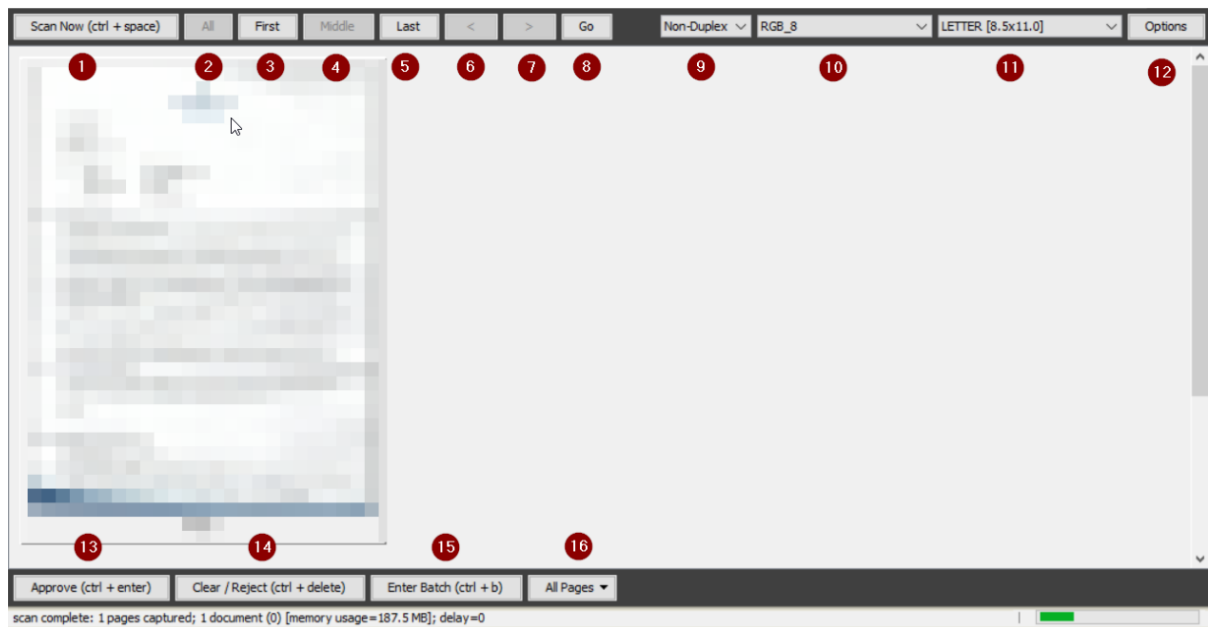


2. Fill out the required form fields.
3. Click [**Save and Scan**].

If your browser supports launching Java apps, a message dialog opens:



If your browser does not support launching Java apps, a message dialog opens:



4. If an app does not launch, click one of the links in the message dialog.
5. Launch the downloaded Java app.

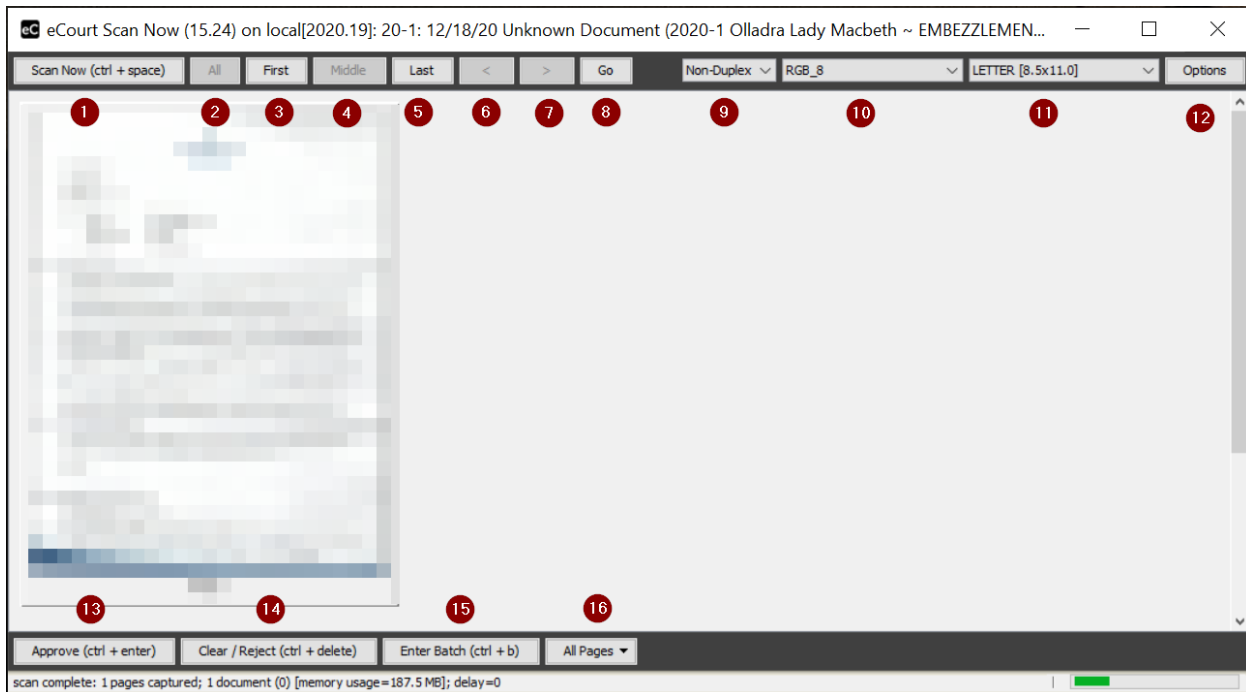
When the Java app is launched, the scan window opens.



If you have a document already on a feeding scanner, the scanning app

may start to scan the document the moment the app opens.

Scanning controls



1. **[Scan Now]**: Scan the current document to the screen for review.
2. **[All]**: All scanned pages.
3. **[First]**: Go to the first scanned page.
4. **[Middle]**: Go to the middle of the scanned document.
5. **[Last]**: Go to the last scanned page.
6. **[<]**: Go back one page.
7. **[>]**: Go forward one page.
8. **[Go]**: Go to the desired page of document. Enter number using dialog.
9. **Tray Type**: Select the type, **Duplex** or **Non Duplex**.
10. **Color Settings**: Select the scan color settings.
11. **Size**: Choose the paper size.
12. **[Options]**: Show advanced scanner options.

SCANNER SETTINGS

General Scanner Settings

Device Type TWAIN

Device EPSON ES-200

Output Format PDF

PDF Image Compression 0.8

Page Size LETTER [8.5x11.0]

Resolution 150

Bit Mode RGB_8

Show Scanner GUI NEVER

Duplex

Remove Blank Pages

View All Pages Before Approval

Require Batch on Barcode Scans

Auto Generate Batch

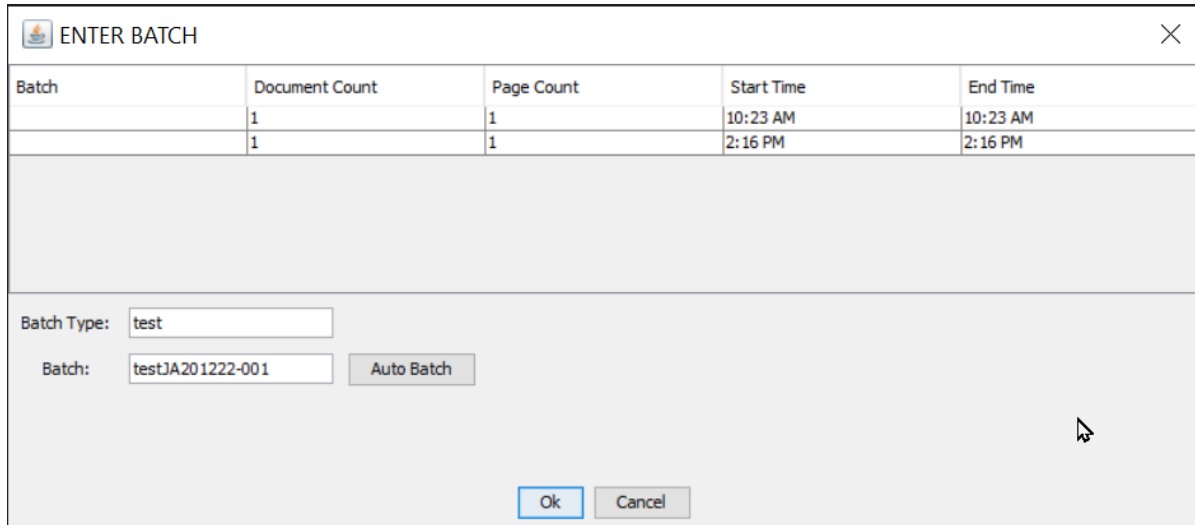
Batch Type

Thumb Size 400

OK

Cancel

13. **[Approve]**: Send the scanned document to the **Filing Cabinet**.
14. **[Clear / Reject]**: Remove the current scan from the window and start fresh.
15. **[Enter Batch]**: Open the **Batch** window to group multiple scanned documents from this session together.



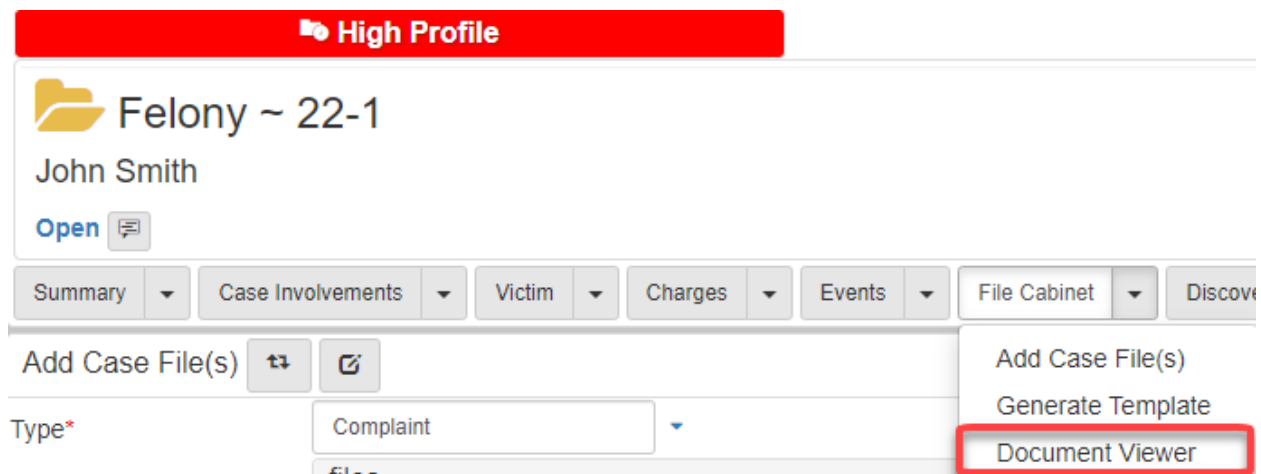
16. **Page Rotation**: Select option to rotate document pages.

Document viewer

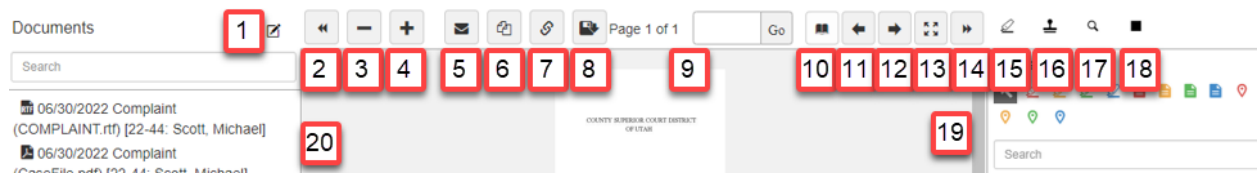
This section describes the Document Viewer and its features.

The Document Viewer allows you to open, view, and edit contents of a file without leaving the browser window.

The **Document Viewer** can be accessed from a Case/Person view using the **File Cabinet** dropdown > **Document Viewer**.



Controls



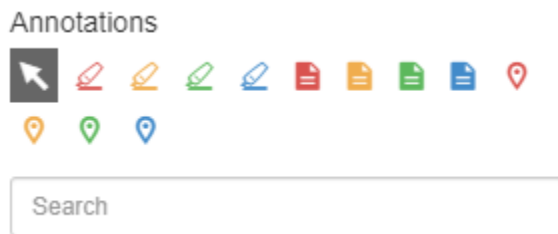
1. **Stack Paper Icon** - Organize Documents. Move files, add/remove/rename directories.

Update Document

A screenshot of the 'Update Document' form. The form is titled 'Update Document' and contains several fields and sections. The 'Type' field is a dropdown menu with 'Complaint' selected. The 'File' field has a search icon and a close icon. The 'File Name' field contains 'COMPLAINT.rtf'. The 'Status' field is a dropdown menu. Below these fields is a section titled 'Discovery Review Status' with a dropdown arrow. Inside this section, the 'Review Status' field is a dropdown menu, and the 'Review Status Date' field contains '06/30/2022' with a calendar icon. At the bottom of the form, there is a button labeled 'Convert Document To PDFWidget' with a PDF icon.

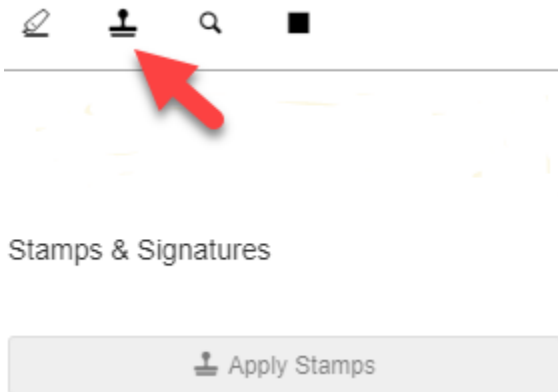
2. **Double Arrows Icon** - show or hide the left side bar in the viewer.
3. **Minus Sign Icon** - zoom out the document view.
4. **Plus Sign Icon** - zoom in the document view.
5. **Print Icon** - print the document. Requests desired number of copies.
6. **Email Icon** - email the document in your default email client.
7. **Copy Icon** - copy text from the selected area in the file.
8. **Link Icon** - copy the direct URL link for this document.

9. **Disk Down Arrow Icon** - download this document.
10. **Page Navigation** - navigate to the desired document page number.
11. **Book Icon/Paper Icon** - Change views between reading view and letter view.
12. **Left Arrow Icon** - navigate to the previous page.
13. **Right Arrow Icon** - navigate to the next page.
14. **Square Expand Icon** - enter/exit full screen mode.
15. **Double Arrows Icon** - show or hide the right side bar in the viewer.
16. **Marker Icon** - swap right sidebar content for annotations section.

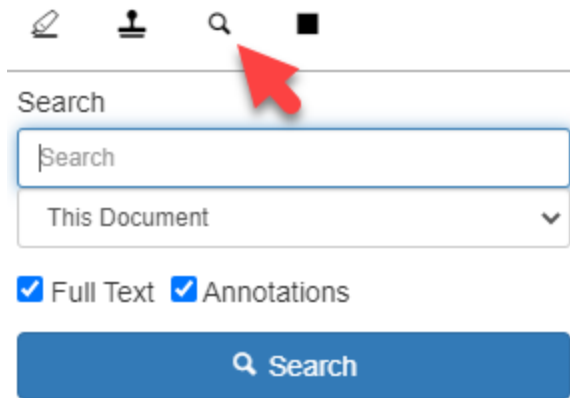


Created annotations can be filtered in the Find bar.

17. **Stamp Icon** - Swap Right Sidebar content for Stamp section.

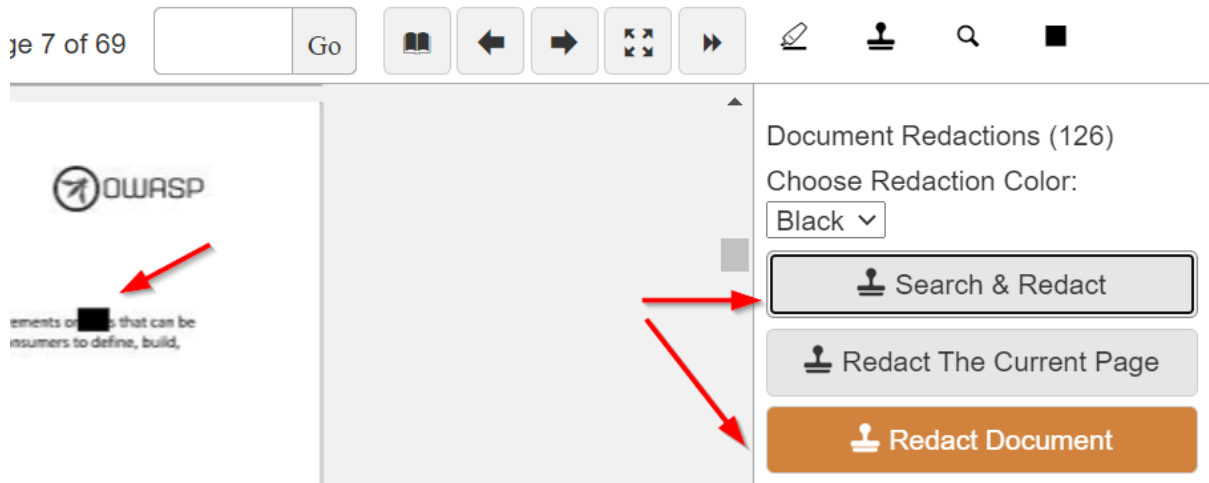


18. **Magnifying Icon** - Swap Right Sidebar content for Document Search section.



Search for terms in the Full Text content of the document and/or in Annotations you have created.

19. **Square Icon** - Swap Right Sidebar content for Redact section.



Redact a whole page or redact terms for the document. The preceding example redacted the word **test**. Click [**Redact Document**] to apply redactions.

20. **Left Side Bar** - The left bar shows the documents and folder structure. Also, you can filter the documents based on your Find criteria in the Find bar.

21. **Right Side Bar** - The right bar content changes based on the buttons you have clicked in previous steps. Annotations, Stamps, Search and Redact.

Financials

Financials is only approved for individuals with the financial workflow enabled on their account. Financials can be broken down in the following categories: bail, cash receipts, check writing, creating invoices, deposits, pay plans, refund, restitution, transfers, and vouchers. Each category is defined more in detail on a separate page.

Bail

Bail can be found in the case folder view under **Case Involvements** tab:

Type	Person	Contact Information	Status	Arrest Date
Defendant	Guildenstern, Pelor		Current	2/1/13

Role	Person	Status	Assigned Date
District Attorney	Lady Macduff, Zivilyn	Current	2/1/13
District Attorney	Iago, Loviatar	Current	2/1/13
District Attorney	Guildenstern, Loviatar	Current	2/1/13
Judge	First Musician, Mishakal	Current	2/1/13
Discovery Recipient	Merrill, Bradey	Current	1/19/21
Discovery Recipient	Merrill, Bradey	Current	1/19/21

Type	Amount	Status	Status Date
Cash	90.00		

For information on creating, posting, forfeiting, and refunding cash bails, see <https://documentation.journaltech.com/eAttorney/user/financials/bail.html>.

Cash receipts

The Cash Receipts screen allows for the payment of invoices and transfer of money. Cash Receipts can be found under case folder view under **Financials > Cash Receipts** or under **Accounting > Cash Receipts** in the left hand side navigation bar.

Type	Person	Contact Information	Status	Arrest Date
Defendant	Guildenstern, Pelor		Current	2/1/13

Role	Person	Status	Assigned Date
District Attorney	Lady Macduff, Zivilyn	Current	2/1/13
District Attorney	Iago, Loviatar	Current	2/1/13
District Attorney	Guildenstern, Loviatar	Current	2/1/13
Judge	First Musician, Mishakal	Current	2/1/13
Discovery Recipient	Merrill, Bradey	Current	1/19/21
Discovery Recipient	Merrill, Bradey	Current	1/19/21

Type	Amount	Status	Status Date
Cash	90.00		

For information on opening a till, switching till modes, adding fees, and taking payments, see <https://documentation.journaltech.com/eAttorney/user/financials/bail.html>.

Check writing

Once there is money that is ready to be vouchered out of the system, you can go to the Check Writing screen to search for existing vouchers and write checks for them. The check numbers can be saved to each voucher and then archived as complete. Check writing can be accessed under **Accounting > Payables > Check Writing** in the left navigation pane.

The screenshot displays the 'Check Write (search vouchers)' interface. On the left, the navigation menu includes 'Workspace', 'Add Case', 'Searches & Reports', 'Cashier', and 'Accounting'. Under 'Accounting', there are sections for 'Tills', 'Payables', and 'Banking'. 'Check Writing' is highlighted under 'Payables'. The main content area contains the following search criteria:

- Bank*: Bank
- From: 01/29/21 To: [empty]
- Search Type: Case Vouchers
- Agency Account: Search
- Case: Search
- Jurisdiction: Search
- Payee Name: [empty]
- Show Fully Paid Vouchers:

For information on check writing, see https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html.

Creating invoices

Invoices are created when fees are added from the cash receipts screen.

Deposits

Deposits are used to record money taken to the bank. Deposits can be found under **Accounting > Banking > Create/Search Deposits** in the left hand side navigation.

The screenshot shows a software interface for managing checks and vouchers. On the left is a vertical navigation menu with categories: Workspace, Add Case, Searches & Reports, Cashier, Accounting (highlighted with a red box), Tills (with sub-items: Till Management, Till Search, Till Participant Search), Payables (with sub-items: Vouchers, Checks, Check Writing, Check Re-Print, Search Printed Checks), Banking (with sub-items: Create/Search Deposits (highlighted with a red box), NSF Checks, Financial Reports), and Financial Setup. The main content area is titled 'Check Write (search vouchers)'. It features several search filters: 'Bank*' (dropdown menu), 'From' (date field with '01/29/21') and 'To' (empty date field), 'Search Type' (dropdown menu set to 'Case Vouchers'), 'Agency Account' (searchable dropdown), 'Case' (searchable dropdown), 'Jurisdiction' (searchable dropdown), and 'Payee Name' (text field with a search icon). There is also a checkbox for 'Show Fully Paid Vouchers'. At the bottom of the main area is a 'Search Vouchers' button.

For information on creating, searching, and editing deposits, see <https://documentation.journaltech.com/eAttorney/user/financials/deposits.html>.

Payment plans

Payment plans allow the payor to make small payments towards the obligations over an extended period of time. For information on pay plans, see https://documentation.journaltech.com/eAttorney/user/financials/pay_plans.html.

Refund

Refunds can be given to individuals that have already paid/overpaid a fine or fee on a case. For information on creating, approving, and sending a refund request, see https://documentation.journaltech.com/eAttorney/user/financials/pay_plans.html.

Restitution

Restitutions can be added to a case under **Financials** > **Add Restitution** inside of a case folder view.

High Profile

Felony ~ 22-1
John Smith

Open [icon]

Summary | Case Involvements | Victim | Charges | Events | File Cabinet | Discovery | **Financials** | Investigat

Add Restitution [icon] [icon]

Amount*

Payee/Payor*

- Payee**
- Smith, Mary [Victim]
- Payor(s)**
- Smith, John [Defendant]

Save & Back | Save & Add Another | Back

Receiv
Next 0:
Attorne
Defens

Cash Receipts
Add Restitution
Time & Expense

For information on adding restitution, see <https://documentation.journaltech.com/eAttorney/user/financials/restitution.html>.

Transfers

Transfers allow the transfer of payments from one obligation to another. This can happen across different cases if payments towards an incorrect obligation are selected. Transfers help keep a clear paper record of where money is coming from and going. For more information on transfers, see <https://documentation.journaltech.com/eAttorney/user/financials/transfers.html>.

Vouchers

A voucher is money you have in the system that needs to be sent out to some other entity. For information on searching, voiding, and writing a check for a voucher, see <https://documentation.journaltech.com/eAttorney/user/financials/vouchers.html>.

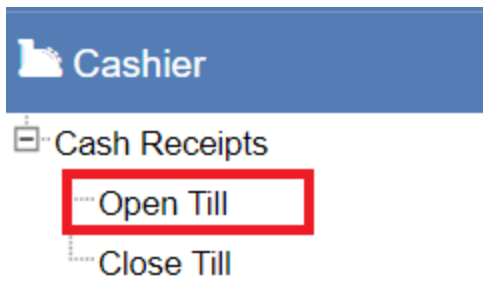
Cash receipts

Use the **Cash Receipts** screen to pay invoices and transfer money.

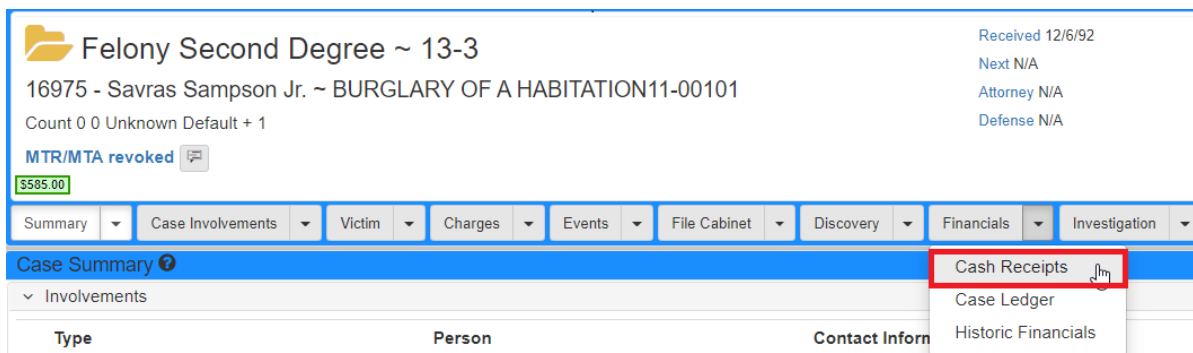
Opening a till

Before accessing the **Cash Receipts** screen, you must open a till. You can open a till in one of two ways:

1. Navigate to **Left navigation > Cashier > Cash Receipts > Open Till**.



2. Or from a **Case**, click the **Financials** dropdown, then select **Cash Receipts**:



After selecting your option to open your till, you are prompted to open a till if it is the first time you have accessed Cash Receipts for the day.



If you have an unclosed till from a previous day, you are prompted to close that till before you can proceed.

Please enter your login credentials for verification

Open Till for Incabulos Prince Escalus

Verification

Username*


Password*

Select Default Till

Till Group General-GCDA

Till Name GeneralGCDA

Other Information

Till Date 

When you have an open till, your till number and a **Cash Register** icon show at the top of the screen:



Navigate the cash receipts screen

If you access **Cash Receipts** from a case, the screen shows the owed financials for that case. Otherwise, you must to search for the case if you want to take payments for it.

The **Search Cases** field in the **Cash Receipts** screen can be used to display a **Case**

Assessment Detail panel.

By typing in the case number or name of the case, the search shows a list of cases:

The screenshot shows the top navigation bar with the text "Till 112420-IP-2 | GeneralGCDA | General-GCDA | Incabulos Prince Escalus Opened Nov 24, 2020". Below the navigation bar, there is a search input field containing "19-" and a dropdown menu labeled "Process Payments". To the right of the search field, there are two buttons: "+ Non-Case Fee/Service" and "+ Trust Deposit". Below the search field, a dropdown menu titled "Cases" is open, showing a list of case entries. The selected case is "19-991: - Moradin Brabantio ~ ASSAULT - BODILY ...". To the right of the search field, there is a table with columns "Payment Date" and "Payment Method". Below the table, there is a section titled "Amount Tendered*" with a value of "0.00". Below this, there is a table with columns "Paid", "Remaining Balance", "Overpayment", and "Change Due", all with values of "0.00".

By choosing a case from the list, the **Case Assessment Detail** panel shows. By searching and choosing another case, multiple panels can be shown. A benefit of opening multiple cases is the ability to take payments over more than one case at once.

The screenshot shows the top navigation bar with the text "Till 112420-IP-2 | GeneralGCDA | General-GCDA | Incabulos Prince Escalus Opened Nov 24, 2020". Below the navigation bar, there is a search input field containing "19-967: - Wee Jas Malcolm ~ THEFT PROP > \$2,500..." and a dropdown menu labeled "Process Payments". To the right of the search field, there are two buttons: "+ Non-Case Fee/Service" and "+ Trust Deposit". Below the search field, there is a table with columns "Date", "Description", "Party", "Owed", "Paid", and "Balance". The table contains three rows of transactions, all dated 11/23/20, and a "Totals" row. The "Totals" row shows "Owed" as 2,798.31, "Paid" as 0.00, and "Balance" as 2,798.31.

Date	Description	Party	Owed	Paid	Balance
11/23/20	[REST] Restitution	Malcolm, Wee Jas [DEF]	2,693.31	0.00	2,693.31
11/23/20	[MF] MERCHANT FEE	Malcolm, Wee Jas [DEF]	30.00	0.00	30.00
11/23/20	[DAFEE] DA FEE	Malcolm, Wee Jas [DEF]	75.00	0.00	75.00
Totals			2,798.31	0.00	2,798.31

Switch till modes

Users that are taking mailed-in payments can switch their **Till Mode** in the **Cash Receipts** screen. By default, tills are set to use the **Counter** mode. The background color is blue and the top left icon shows a **Cash Register** icon. This is part of core and cannot be customized.

The screenshot shows the top navigation bar with the text "Till 112420-IP-2 | GeneralGCDA | General-GCDA | Incabulos Prince Escalus Opened Nov 24, 2020". Below the navigation bar, there is a search input field containing "19-967: - Wee Jas Malcolm ~ THEFT PROP > \$2,500..." and a dropdown menu labeled "Process Payments". To the right of the search field, there are two buttons: "+ Non-Case Fee/Service" and "+ Trust Deposit".

If a user needs to record a payment made by mail, they click the **Cash Register** icon in the upper left corner of the **Cash Receipts** screen. This changes the background color to yellow and replaces the **Cash Register** icon with an **Envelope** icon. This option is only used if you must separate how you receive your payments and is not required to take payments.

The screenshot shows the top navigation bar with the text "Till 112420-IP-2 | GeneralGCDA | General-GCDA | Incabulos Prince Escalus Opened Nov 24, 2020". Below the navigation bar, there is a search input field containing "19-967: - Wee Jas Malcolm ~ THEFT PROP > \$2,500..." and a dropdown menu labeled "Process Payments". To the right of the search field, there are two buttons: "+ Non-Case Fee/Service" and "+ Trust Deposit".

Process payments

The **Process Payments** mode allows you to take payments and assess a fee, fine, or service. The screen has three panels: **Assessment Details**, **Payment Methods**, and **Payor Information**:

The screenshot displays the 'Process Payments' interface for case 19-961: 27113 - The Traveler Rodrigo ~ THEFT ... The interface is divided into three main panels, each highlighted with a red border and a black callout box:

- Assessment Details:** A table listing assessed items. The table has columns for Date, Description, Party, Owed, Paid, and Balance. The items listed are: [MF] MERCHANT FEE (30.00 Owed, 0.00 Paid, 30.00 Balance), [REST] Restitution (561.80 Owed, 0.00 Paid, 561.80 Balance), and [DAFEE] DA FEE (75.00 Owed, 0.00 Paid, 75.00 Balance). A Totals row shows 666.80 Owed, 0.00 Paid, and 666.80 Balance.
- Payment Methods:** A section for selecting payment methods. A dropdown menu shows 'Cash'. To the right, there is a summary table: Amount Tendered* (666.80), Paid (666.80), Remaining Balance (0.00), Overpayment (0.00), and Change Due (0.00).
- Payor Information:** A form for entering payor details. Fields include: Payor (Rodrigo, The Traveler [DEF]), Address 1 (6253 Swashbuckler lane), Company, First Name (The Traveler), Middle Name, Last Name (Rodrigo), State, ZIP (77327), and Tel. There is also a Comments field.

At the bottom of the interface, there are buttons for 'Submit', 'Clear All', and 'More Actions'.

The **Assessment Details** panel shows fees, fines, or services assessed to the case. It is also possible to show more than one case **Assessment Details** panel using the **Case Search** field.

The **Payment Methods** panel allows you to take payments on the items listed in the **Assessment Details** panel. By default, one payment method is shown on the list, but multiple payment methods can be added to the panel. For example, payment can be made with cash and the rest with credit card.

The **Payor Information** panel allows you to select the payor, if it is a party from the case. If payor is not a party on the case, you can select **Other** and enter in the payors information.

Add a fee

With a case open, click [+ Fee/Service]. Enter the desired fee or service type. You can continue to add fees/services by clicking [+] on the right side of the panel. Once you are finished entering the fees/services, click [Save Fee].

19-961: 27113 - The Traveler Rodengo - THEFT ...

All Parties x + Fee/Service

Fee/Service* [DAFEE] DA FEE

Fee Date 11/24/2020

Fee Due Date 12/01/2020

Party x Rodengo, The Traveler [DEF]

Quantity 1 Rate 75.00 Amount 75.00

Save Fee +

The following options are available when adding a fee:

Field/button	Description
Fee/Service	Click the Fee/Service lookup to show a dialog box where you can choose a fee, fine, or service.
Fee Date	This populates with the current date and is the date the fee/service is added.
Fee Due Date	Set this to the date the fee is due by.
Party	Use the Party field to select which party members the fee, fine, or service should be assessed to.
Quantity	Set the number of fees/services to add.
Rate	Set a single amount for the fee/service.
Amount	Shows the calculated total (Quantity × Rate).
[Save Fee]	Click to save the added fees/services.
[+]	Click [+], in the bottom right of the panel, to add another item to the list.

Take a payment

Payments are made in the **Cash Receipts** screen. If a case is not loaded into the screen, search for a case to take payment for.

Till 112420-IP-2 | GeneralGCDA | General-GCDA | Incubulos Prince Escalus Opened Nov 24, 2020

19- Process Payments + Non-Case Fee/Service + Trust Deposit ⋮

Cases

- 19-993: 18680 - Incubulos Duke of Venice ~ POSS...
- 19-992: 27132 - Dol Arrah Horatio ~ THEFT PROP...
- 19-991: - Moradin Brabantio ~ ASSAULT - BODILY ...**
- 19-990: - Arawai Marcellus ~ THEFT PROP >=\$100<...
- 19-989: 27131 - Myrkul Othello ~ DRIVING WHIL...
- 19-988: 18660 - Rao Peter Jr. ~ EVADING ARREST ...
- 19-987: 18662 - The Devourer Marcluff ~ EVADING

Payment Date + Payment Method

Amount Tendered*

0.00

Paid 0.00
 Remaining Balance 0.00
 Overpayment 0.00
 Change Due 0.00

Once the cases are loaded, the open invoices for the cases you are accessing are shown. By default, all open invoices are selected for taking a payment. If you need to apply the payment to a single invoice, deselect the other invoices that should not be part of the payment. After making the desired invoice selections, select the payment method to use for the payment and enter the amount tendered.

19-961: 27113 - The Traveler Roderigo ~ THEFT ... All Parties + Fee/Service ⋮

<input type="checkbox"/>	Date	Description	Party	Owed	Paid	Balance
Fine/Fees						
<input type="checkbox"/>	11/23/20	[MF] MERCHANT FEE	Roderigo, The Traveler [DEF]	30.00	0.00	30.00
<input type="checkbox"/>	11/23/20	[REST] Restitution	Roderigo, The Traveler [DEF]	561.80	0.00	561.80
<input checked="" type="checkbox"/>	11/23/20	[DAFEE] DA FEE	Roderigo, The Traveler [DEF]	75.00	0.00	75.00
Totals				75.00	0.00	75.00

Payment Methods Payment Date + Payment Method

Cash **Amount Tendered***

75.00

Paid 75.00
 Remaining Balance 0.00
 Overpayment 0.00
 Change Due 0.00

Next, fill in the **Payor Information**. If a party on the case is making the payment, you can select them from the **Payor** dropdown. Otherwise, select **Other** and enter the payor information. After selecting the **Payor**, click **[Submit]** at the bottom of the panel.

Payor Information

Payor	<input type="text" value="Roderigo, The Traveler [DEF]"/>	Address 1	<input type="text" value="5253 Swashbuckler lane"/>
Company	<input type="text"/>	Address 2	<input type="text"/>
First Name	<input type="text" value="The Traveler"/>	City	<input type="text" value="Cleveland"/>
Middle Name	<input type="text"/>	State	<input type="text" value="Ohio"/>
Last Name	<input type="text" value="Roderigo"/>	ZIP	<input type="text" value="77327"/> - <input type="text"/>
Tel		<input type="text"/>	
Comments	<input type="text"/>		

If the invoice is paid in full, it no longer shows on the **Cash Receipts** screen and a printable receipt is shown. The receipt can be reprinted from the **Case Ledger** screen.

Use multiple payment methods

When processing payments on a transaction, you can use multiple payment methods at once. For example, pay half with cash, and the other half with check. There is no limit to the payment methods that can be added to a transaction.

Add an extra payment method to the panel and enter the information as you would for a single payment method.

Payment Methods Payment Date

	Amount Tendered*
<input type="text" value="Cash"/>	<input type="text" value="50.00"/> <input type="button" value="⊖"/>
<input type="text" value="Credit Card"/>	<input type="text" value="25.00"/> <input type="button" value="⊖"/>
Paid 75.00	
Remaining Balance 0.00	
Overpayment 0.00	
Change Due 0.00	



When using multiple payment methods, the **Payor Information** is applied to each of the payment methods. If the **Payor Information** needs to be different for each transaction, each payment should be taken individually using the partial pay method.

Payment plans

Payment plans allow the payor to make small payments towards the obligations over an extended period of time.

Accessing a payment plan

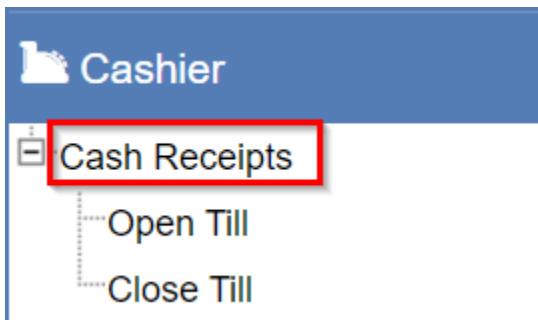
To add a payment plan, you must have an open till and use the **Cash Receipts**.



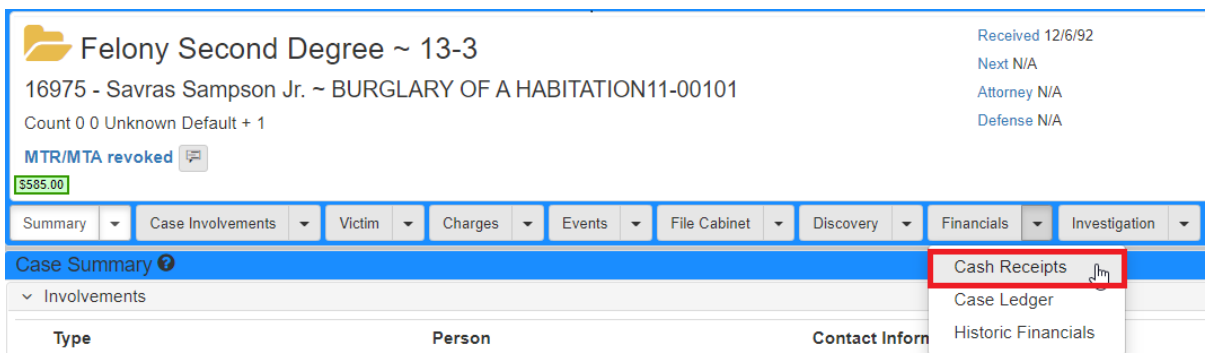
Only Financial users can navigate to the **Cash Receipts** screen. For more information about setting up a user as a Financial User, refer to [User navigation](#).

There are two ways to show this screen:

1. Navigate to **Left navigation > Cashier > Cashier Receipts**.



2. Access it using the current case. Click the **Financials** dropdown, then select **Cash Receipts**.



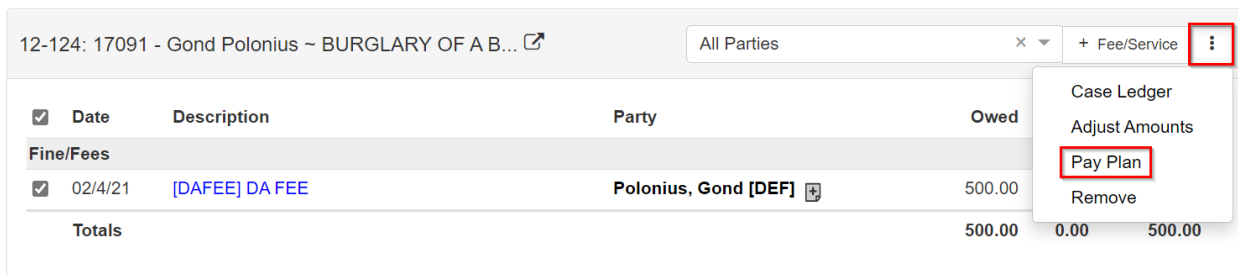
If accessed using the Left navigation, the Case is not populated on the **Cash Receipts** screen. You need to search for the case you would like to work with. Refer to https://documentation.journaltech.com/eAttorney/user/financials/cash_receipts.html for more information on searching. If accessed using the current case, the **Case** row is populated in the **Cash**

Receipts screen.

Adding a payment plan

On the **Cash Receipts** screen, if you have an unpaid obligations **Case** row available:

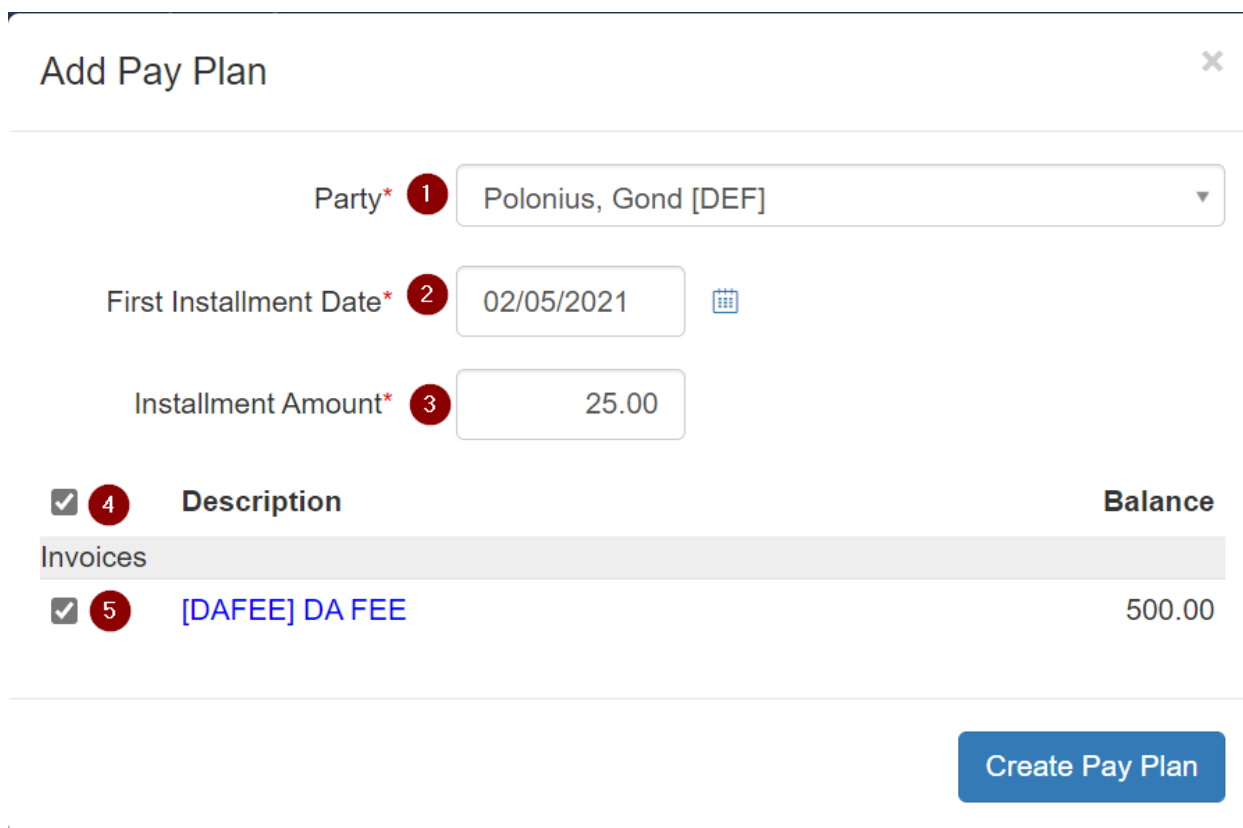
Click the vertical ellipses (three dots) to open the context menu, then select **Pay Plan**:



The screenshot shows a table with columns: Date, Description, Party, and Owed. A row is selected with a context menu open. The menu options are: Case Ledger, Adjust Amounts, Pay Plan (highlighted with a red box), and Remove. The table data is as follows:

<input checked="" type="checkbox"/>	Date	Description	Party	Owed
Fine/Fees				
<input checked="" type="checkbox"/>	02/4/21	[DAFEE] DA FEE	Polonius, Gond [DEF]	500.00
Totals				500.00

The **Add Pay Plan** form shows:



The Add Pay Plan form contains the following fields and sections:

- Party*** 1: Polonius, Gond [DEF]
- First Installment Date*** 2: 02/05/2021
- Installment Amount*** 3: 25.00
- Description** 4: [DAFEE] DA FEE
- Balance** 5: 500.00

A **Create Pay Plan** button is located at the bottom right of the form.

1. Use the **Party** dropdown to select the paying party.
2. Set the payment plan **First Installment Date**.
3. Set the recurring **Installment Amount**.

4. Select all obligations.
5. Select a single obligation.

Click **[Create Pay Plan]**, then click **[Ok]** in the confirmation dialog.

The **Payment Plan** shows under the **Case** row on the **Cash Receipts** screen.

<input checked="" type="checkbox"/>	Date	Description	Party	Owed	Paid	Balance
Pay Plans						
<input checked="" type="checkbox"/>	01/22/21	Pay Plan PP2-1 Classification: Total Balance 500.00	Polonius, Gond [DEF]	25.00	0.00	25.00
	02/5/21	Installment		25.00	0.00	25.00
Totals				25.00	0.00	25.00

Bail



Do not forget to **Open a Till** if you have not already today.

Create a cash bail record

Cash bail is created in the **Case** by clicking the **Case Involvements** dropdown, then selecting **Add Bail**.

Misdemeanor Class B ~ 13-211
 23282 - Pelor Guildenstern ~ THEFT PROP >=\$20<\$500 BY CHECK
 Count 1 31.03(e)(2)(Aii) PC THEFT PROP >=\$20<\$500 BY CHECK

Filed

\$5.00

Summary Case Involvements Victim Charges Events File Cabinet




Add Bail ?




- Add Involvement
- Add Justice Personnel
- Add Defendant
- Add Bail


Bail Type




Bail Amount



In the **Add Bail** screen, fill in the **Bail** and **Bail Condition(s)** panels.

Add Bail  Add to Guildenstern, Pelor [DEF]  

Bail Type 
 Bail Amount
 Status 
 Status Date 

 Bail Condition(s)

Condition Type 
 Begin Date 
 End Date 
 Notes

 Save & Back  Back

Field	Description
Bail Type	Select between Cash or Bail Bond/Surety .
Bail Amount	Input the Bail amount. This can be defaulted to a value derived from the statutes.
Status	Set the Bail status to one of: Active , Forfeiture , Never Collect , Pending , Posted , Set .
Status Date	Defaults to the current date and is read-only.
Condition Type	Set the type of Bail Condition applied with Bail .
Begin Date	Set the date when the Bail Condition takes effect.
End Date	Set the date when the Bail Condition ends.

Field	Description
Notes	Use to add further detail to the Bail Condition .

Once you have entered the data, click [**Save & Back**]. The set **Bail** now shows on the bottom of the **Case Involvement** screen.

Bail			
Type	Amount	Status	Status Date
Cash	5.00		01/25/2021
L	01/25/2021	01/27/2021	Test

Post cash bail

Posting a **Cash** bail makes the **Bail** record become a collectable financial and show on the **Case Ledger**. To make this happen, the **Bail Status** needs to be set to **Posted**. To update the **Bail Status**, click the **Cash** link in the **Type** column of the **Bail** panel at the bottom of the **Case Involvement** screen.

Bail			
Type	Amount	Status	Status Date
Cash	5.00		01/25/2021
L	01/25/2021	01/27/2021	Test

In the **Update Bail** screen, select **Posted** in the **Bail Status** dropdown. Click [**Save & Back**].

Update Bail ? ↺

Bail Type: Cash

Bail Amount Cents: 500

Status: [Dropdown Menu]

Status Date:

Bail Condition(s) (1)

Condition Type: [Dropdown]

Begin Date: 01/25/2021

End Date: 01/27/2021

Notes: Test

Save & Back | Back

The updated status shows on the **Case Involvement** screen. The **Bail** also shows on the **Case Ledger**. The **Bail** can now be paid into eAttorney.

Summary | Case Involvements | Victim | Charges | Events | File Cabinet | Discovery | Financials | Investigation | Tasks

Communication | NC Financials | Reports

Cash Receipts
Case Ledger
 Historic Financials

Case Ledger

All Items | All Sub-Cases

Bail							
Date	Account Name	Party/Payor	Party Type	Reference	Amount	Paid	Balance
01/25/21	Cash \$5.00	Polonius, Gond	Defendant	1	5.00	0.00	0.00
Totals					5.00	0.00	0.00

Navigate to **Cash Receipts** and pull up the case you are taking the payment on. It is easier to do this from the dropdown of the **Financial** tab from the **Case Record** as it loads **Cash Receipts** with the case pulled up. Select the **Bail** item under the **Bails** panel.

In the **Payment Methods** panel, enter the **Monetary Instrument** type used to make the payment and the amount tendered. Select the **Payor** if they are involved on the case, when the defendant makes the payment. Otherwise, choose the **Other** option in the **Payor**

dropdown and fill in the information for the person making the payment. Click [**Submit**].

The screenshot shows a navigation bar with various menu items. A dropdown menu is open under 'Financials', with 'Case Ledger' highlighted. Below the menu, a table titled 'Case Ledger' is displayed, showing a single entry for a bail payment.

Date	Account Name	Party/Payor	Party Type	Reference	Amount	Paid	Balance
01/25/21	Cash \$5.00	Polonius, Gond	Defendant	1	5.00	0.00	0.00
Totals					5.00	0.00	0.00

After taking the payment, the **Cash Receipts** screen refreshes and shows an indicator that there is a **Bail Deposit** on the case. Also, a **Cash Receipt** popup window shows giving you the payment information. In the following example, part of the **Bail** is paid.

The screenshot shows three overlapping windows. On the left, a 'Bail Deposit' table shows a payment of \$5.00 on 01/25/21. In the center, a 'Cash Receipt' popup window shows details for a receipt of \$5.00. On the right, a table shows the updated 'Bail' status with a total of \$3.00 remaining.

Date	Description	Amount
01/25/21	Cash \$5.00 Posted	5.00
Totals		5.00

Date	Description	Amount
01/25/21	Cash \$5.00 Posted	5.00
Totals		5.00

Item	Owed	Paid	Balance
12-124 Polonius, Gond Trust Deposit	25.00	0.00	25.00
12-124 Polonius, Gond Bail	25.00	0.00	25.00
Total	50.00	0.00	50.00



The **Case Ledger** also shows the reflected **Bail** payment, which also shows in the case header.

Forfeiting cash bail

Forfeiting a **Cash Bail** creates a receivable from the **Cash Bail** and starts with updating the **Bail Status**. To update the **Bail Status**, click the link in the **Type** column of the **Bail** panel at the bottom of the **Case Involvement** screen:

Type	Amount	Status	Status Date
Cash	5.00		01/25/2021
	01/25/2021	01/27/2021	Test

In the **Update Bail** screen, select **Forfeiture** in the **Bail Status** dropdown. Click [**Save & Back**].

Update Bail  

Bail Type*


Bail Amount (Cents)*


Status

Status Date

Bail Condition(s) (1)

Condition Type

Begin Date 

End Date 

Notes

Navigate to **Cash Receipts** and pull up the case you are taking the payment on. It is easier to do this from the dropdown of the **Financial** tab from the **Case Record** as it loads **Cash Receipts** with the case pulled up. Now, create a **Transfer** from the paid **Bail** to the **Bail Fee**, created when **Forfeiture** status is set. See [Creating a transfer](#). Rule **Forfeit Cash Bail** is executed on the status update and creates the **Other Costs** invoice.


Refunding cash bail


If money is collected for the forfeited cash **Bail** and it needs to be **Transferred** or **Refunded**, refer to <https://documentation.journaltech.com/eAttorney/user/financials/transfers.html> or <https://documentation.journaltech.com/eAttorney/user/financials/refunds.html>.

Bail bond/surety

Creating bail bond/surety


Bail Bond/Surety is created in the case by clicking the **Case Involvements** dropdown, then selecting **Add Bail**.

 **Misdemeanor Class B ~ 13-211**
 23282 - Pelor Guildenstern ~ THEFT PROP >=\$20<\$500 BY CHECK
 Count 1 31.03(e)(2)(Aii) PC THEFT PROP >=\$20<\$500 BY CHECK

Filed 

\$5.00



Summary Case Involvements Victim Charges Events File Cabinet

Add Bail  Add Involvement Add Justice Personnel Add Defendant **Add Bail**

Bail Type

Bail Amount


In the **Add Bail** screen, select **Surety/Cash Bond** in the **Bail Type** dropdown.

Add Bail  Add to Marcellus, Pholtus [DEF] 

Bail Type*


Bail Amount (Cents)*


Status

Status Date 



Bail Condition(s)

Condition Type

Begin Date 

End Date 

Notes

 Save & Back  Back

Once you have entered the data, click [**Save & Back**]. The set **Bail** shows on the bottom of the **Case Involvement** screen.

Restitution

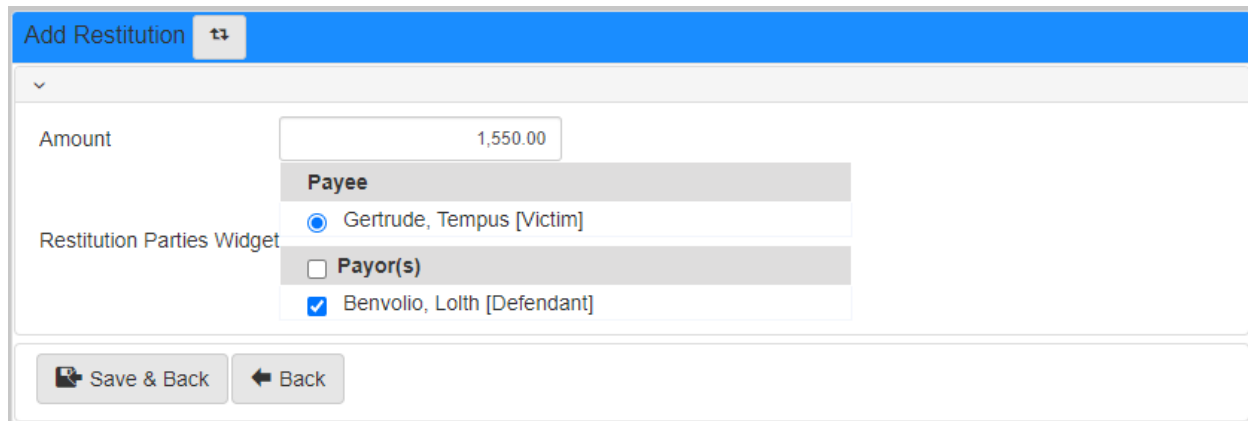
Add restitution to a case

To add restitution to a case, click the **Financials** dropdown, then select **Add Restitution**.



The screenshot shows a case summary for 'Misdemeanor Class B ~ 12-407'. The case details include '24473 - Lolth Benvolio ~ DRIVING WHILE LIC. INVALID OR SUSP W/PREV CONV' and 'Count 1 521.457(f)(1) DRIVING WHILE LIC. INVALID OR... - Conviction'. The status is 'Closed Fine'. The 'Financials' dropdown menu is open, showing options: 'Cash Receipts', 'Case Ledger', 'Historic Financials', and 'Add Restitution'. A mouse cursor is pointing at 'Add Restitution'. Below the dropdown, a table shows the defendant 'Benvolio, Lolth'.

The **Add Restitution** screen shows. Fill in the amount, payee, and payor information. Click **[Save & Back]** to finish adding the restitution to the case:



The 'Add Restitution' form shows the following information:

- Amount: 1,550.00
- Restitution Parties Widget:
 - Payee
 - Gertrude, Tempus [Victim]
 - Payor(s)
 - Benvolio, Lolth [Defendant]

Buttons: **Save & Back** and **Back**.

Taking a restitution payment

Taking a payment for restitution is done in the same way as all other payments in the system, by using the **Cash Receipts** screen and entering the payment information.

Refer to https://documentation.journaltech.com/eAttorney/user/financials/cash_receipts.html for details on how to take a payment.

Disbursing restitution

After taking a payment for restitution, it needs to be disbursed. To complete the disbursement process and prepare the payment for check writing, navigate to the **Cash Receipts** screen, click the **More Actions** dropdown, then select **Disbursement**:

Company

Address 1

First Name

Address 2

Middle Name

City

Last Name

State

ZIP - Tel

Comments

- More Actions
- Disbursement**
- Transfer
- Refund
- Receipt Ledger
- Till Close
- Till Detail

This **Disbursement** screen shows. To create a disbursement:

1. If you are coming from the **Cash Receipts** screen with a case already selected, then the **Cases** search is populated from the current case. If not, add the case to the **Cases** search for which you want to create a disbursement, then click [**Search**].
2. Enter the disbursement amount, then click [**Update Disbursement Amount**]. This is likely the same amount as the payment that you took on the **Cash Receipts** screen.
3. Verify the amount of each selected restitution record. If there are multiple restitution records, you may need to manually adjust how much money is coming from where.
4. Select the payee and the address of the person who should receive the restitution.
5. Verify that the information is correct for the payee. This should be the check recipient.
6. Click [**Create Disbursement Voucher**] to finalize the disbursement.

Disbursement

Search

Cases*

1

Disbursement Details

<input checked="" type="checkbox"/> Date	Case	Description	GL Account / Natural Account	Status	Amount	Deduction	Balance	Disbursement
09/04/12	12-407: 24473 - Lolth Benvolio ~ DRIVING WHILE ...	Benvolio, Lolth [DEF]						
<input checked="" type="checkbox"/> 12/3/21		Restitution Trust	GCDA*-TRUST / Trust Account		450.00		450.00	450.00
Total							450.00	450.00

3

Disbursement Amount 2

Payee Information

Select:	Payee Name:	Use This Address:
<input type="checkbox"/>	Lolth Benvolio	<input type="radio"/>
<input checked="" type="checkbox"/> 4	Tempus Gertrude	<input checked="" type="radio"/> 51 Divine Soul court Navasota TX 77868

Payee Name*

Address 1* 5

Address 2

City*

State*

ZIP* -

6

After saving the disbursement, the search results are cleared and a message shows:

Disbursement

Search

Cases*

Disbursement for 450.00 successfully saved

No Search Results

Writing a check

After a disbursement is successfully created, a check for the restitution can be written to the payee.

Refer to the https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html for details on how to write checks.

Check writing

Once money is ready to be vouchered out of the system, use the **Check Writing** screen to search for existing vouchers and write checks for them. The check numbers can be saved to each voucher and then archived as complete.

Check writing process

Check Write (search vouchers)

Bank* Bank ✕

1 From 01/21/2021 📅 To 📅

Search Type Case Vouchers ▼

Agency Account Search ▼
✕

Case Search ▼

Jurisdiction Search ▼

Payee Name 🔍

Show Fully Paid Vouchers

Search Vouchers 2 Printer* Default ✕

Results

Enter Start Check Number* 1764 4

Assign Individual Check Numbers Assign Single Check Number

Select

<input type="checkbox"/>	Date	Case #	Juris.	Payee Name	Payee Address	Voucher #	Check No	Amount
3 <input checked="" type="checkbox"/>	01/22/21	12-1	WPDA	Dole, Bob	123 W 456 S Logan, UT 84321	WPDWPD -100000001	1764	40.00
								40.00

Write Checks 5

1. Enter the criteria for searching for the vouchers you want to write checks for.
2. Click [**Search Vouchers**] to show a list of the vouchers.
3. Select the checkbox next to each voucher you want to write a check for.
4. Enter the starting check number you would like to assign to the checks and click [**Assign Individual Check Numbers**] to assign the numbers to the selected vouchers. The check number shows in the **Check No** column.
5. After applying the check numbers to each check, you can print or write the checks manually.
6. Finally, click [**Write Checks**] to apply the check numbers to the vouchers and archive

them as completed.

Transfers

Generally, transfers are made when a payment is taken and is allocated to the wrong item. The most common scenario of this is when a payment is applied to the wrong case or obligation.

Creating a transfer: between single case obligations

For this example, assume there is a payment made to the wrong obligation for the same case. To fix that scenario:

Navigate to the **Cash Receipts** screen from the case: click the **Financials** dropdown, then select **Cash Receipts**.

Felony Second Degree ~ 13-3
16975 - Savras Sampson Jr. ~ BURGLARY OF A HABITATION11-00101
Count 0 0 Unknown Default + 1
MTR/MTA revoked
\$585.00

Received 12/6/92
Next N/A
Attorney N/A
Defense N/A

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation

Case Summary
Involvements

Type	Person	Contact Inform
------	--------	----------------

In this screen, notice the \$20 payment towards **Bail**. That money should be moved from the **Bail** obligation to the **DA FEE**.

12-6: Marcellus, Phoitus

Date	Description	Party	Owed	Paid	Balance
01/26/21	[DAFEE] DA FEE	Marcellus, Phoitus [DEF]	50.00	0.00	50.00
01/26/21	Cash \$500.00 Posted	Marcellus, Phoitus [DEF]	500.00	20.00	480.00
Totals			550.00	20.00	530.00

While on the **Cash Receipts** screen, click the **More Actions** dropdown at the bottom right of the screen, then select **Transfer**.

Payor Information

Payor: Polonius, Gond [DEF] Address 1

Company: Address 2:

First Name: Gond City: Richards

Middle Name: State:

Last Name: Polonius ZIP: 77873 Tel: (74) 36%

Comments:

Submit Clear All More Actions

- More Actions
- Transfer
- Refund and Disbursement
- Receipt Ledger
- Till Close
- Till Detail

Step 1: items deducting money

On the **Transfer** screen, there should be a case with paid financials. If you accessed the screen from some other location and do not find a case, search for the case you need to transfer funds from. Payments made on this case should show in the **Selected Items to Deduct Money** panel.

Cash Receipts / Transfer Till 012921-IP-11 | GeneralGCDA | General-GCDA | Incabulos... | Opened 01/29/21

Step 1: Manage Items to Deduct Money

Case Search: 12-6: Marcellus, Pholtus

Choose and Add Items for Deduction Filter Search Results: All

Date Item Receipt No. Party Case, Payor Name and address Alert Paid

Search Results are empty

Selected Items to Deduct Money

#	Date	Item Description	Receipt No.	Party	Case, Payor Name and address	Alert	Paid	Amount
1	01/27/2021	DA FEE - Transfer from Trust Deposit, Cash	GCDA-100000008.1	Marcellus, Pholtus [DEF]	12-6 : Marcellus, Pholtus 5574 Crown lane, Navasota, TX 77868		20.00	20.00 x
							Total	20.00

+ Court Trust

Next Clear

Click [Next].

Step 2: items receiving money

The **Step 2: Manage Items to Receive Money** panel shows after the first:

Step 2: Manage Items to Receive money

Case Search: 12-6: Marcellus, Pholtus

Choose and Add Items to Receive Money Filter Search Results: All

Item	Party	Balance
<input type="checkbox"/> Cash \$500.00 Posted	12-6 : Marcellus, Pholtus [DEF]	500.00
<input checked="" type="checkbox"/> DA FEE	12-6 : Marcellus, Pholtus [DEF]	30.00

Add Selected Items for Receiving Money Collapse

Items to Receive Money

#	Date	Item Description	Party	Balance	Amount
				Amount to adjust	20.00
				Total Fixed Amount	0.00
				Total Auto Allocate	0.00

Court Trust
 Party Trust
 Fee

In this example, money should be moved from one obligation to another. In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations, if needed.

Click **[Add Selected Items for Receiving Money]**.

The **Items to Receive Money** panel should populate. You can enter the amount you need to transfer to the obligations:

Choose and Add Items to Receive Money Filter Search Results: All

Item	Party	Balance
<input type="checkbox"/> Cash \$500.00 Posted	12-6 : Marcellus, Pholtus [DEF]	500.00

Add Selected Items for Receiving Money Collapse

Items to Receive Money

#	Date	Item Description	Party	Balance	Amount
1	01/26/2021	DA FEE	12-6 : Marcellus, Pholtus [DEF]	30.00	<input type="text" value=""/>
				Total Fixed Amount	0.00
				Total Auto Allocate	20.00

Court Trust
 Party Trust
 Fee

Step 3: transfer information

Select options for the **Invoice Action** and **Reason** dropdown, then add **Comments**:

Step 3: Transfer Reason

Invoice Action: No Action (invoice remains open, fees will be due) v

Reason*: Refund v

Comments: Test

Click **[Transfer]** to complete the transfer.

Once the transfer is complete, you can navigate to the **Case Ledger** and review the changes. You should be able to follow the money trail. In the following screenshot, an original \$20 payment for **Bail** is shown. It is now deducted and moved to the **DA FEE**. The **DA FEE** is reduced in the amount of \$20. Note the **Transferred Payment** badge on the **DA FEE**.

Case Ledger							
Bail							
Date	Account Name	Party/Payor	Party Type	Reference	Amount	Paid	Balance
01/26/21	Cash \$500.00 Posted	Marcellus, Pholtus	Defendant	4	500.00	0.00	500.00
01/26/21	Payment to Trust Deposit - Cash	Marcellus, Pholtus		GCDA -100000007.1		20.00	
01/27/21	Transfer to DA FEE, Refund	Marcellus, Pholtus		GCDA -100000008.1		-20.00	
Totals					500.00	0.00	500.00

Fines & Fees							
Date	Fine/Fee	Party/Payor	Party Type	Reference	Amount	Paid	Balance
01/26/21	DAFEE DA FEE Transferred Payment	Marcellus, Pholtus	Defendant	446	50.00	20.00	30.00
01/27/21	Transfer from Trust Deposit, Reason: Refund - Test	Marcellus, Pholtus		GCDA -100000008.1		20.00	
Totals					50.00	20.00	30.00

Receipts				
Date	Receipt No.	Type	Till No & Status	Amount
01/26/21	GCDA -100000007.1	Payment	012621-IP-7 Closed	20.00
01/27/21	GCDA -100000008.1	Transfer	012721-IP-8 Closed	20.00

There should also be a receipt in reference to the transfer.

Creating a transfer: case-to-case transfers

For this example, assume that a payment is made to an obligation on the wrong case and it must be applied to another case. To start fixing that scenario, use the same exact case as in the previous example, so there is \$20.00 on the **Bail** paid.

Navigate to the **Cash Receipts** screen from the case.

Felony Second Degree ~ 13-3

16975 - Savras Sampson Jr. ~ BURGLARY OF A HABITATION11-00101

Count 0 0 Unknown Default + 1

MTR/MTA revoked

\$585.00

Received 12/6/92

Next N/A

Attorney N/A

Defense N/A

Summary
Case Involvements
Victim
Charges
Events
File Cabinet
Discovery
Financials
Investigation

Case Summary

▼ Involvements

Type	Person	Contact Inform

Cash Receipts

Case Ledger

Historic Financials

Step 1: items deducting money

On the **Transfer** screen, there should be a case with paid financials. If you accessed the

screen from some other location and do not find a case, search for the case you need to transfer funds from. Payments made on this case should show here in **Selected Items to Deduct Money** panel.

Step 1: Manage Items to Deduct Money

Case Search: 12-6: Marcellus, Pholtus

Choose and Add Items for Deduction Filter Search Results: All

Date	Item	Receipt No.	Party	Case, Payor Name and address	Alert	Paid
Search Results are empty						

Selected Items to Deduct Money

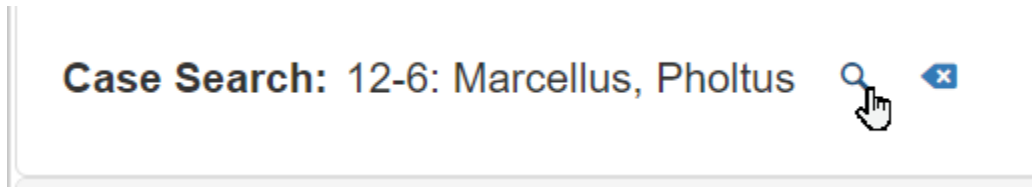
#	Date	Item Description	Receipt No.	Party	Case, Payor Name and address	Alert	Paid	Amount
1	01/29/2021	Bail Trust - Cash Cash	GCDA-10000007.1	Marcellus, Pholtus [DEF]	12-6 : Marcellus, Pholtus 5574 Crown lane, Navasota, TX 77868		20.00	20.00
Total								20.00

Next Clear Select Action

Click [Next]. An extra panel shows after the first.

Step 2: items receiving money

This example demonstrates how to move money from one case to another. To access a different case, use the **Case** search.



Once you have found your case, click it and wait for the bottom panel to populate.

Search

Search Case

Case Number: 12- Status: [dropdown] [icon]

Case Name: [input] Received Date: [calendar] to [calendar]

Case Type: [dropdown] [icon]

Search Clear Refine Add Criteria [dropdown]

Results 1 - 15 of 1,000 1 2 3 ... 67 »

Case Number	Other Case Number(s)	Case Name	Case Type	Status	Received Date
12-1	Law TX12300HEV002, Court 24288	24288 - Moradin Roderigo JR. - DRIVING WHILE INTOXICATED FIRSTTX12300HEV002	Misdemeanor Class B	Closed Probation	11/19/2009
12-3	Prosecutor 12-DA-0003, Law 12-00003448, Court 24287, Court 24287	24287 - Sehanine Mo... PROPERTY12-00003448	24288 - Moradin Roderigo JR. - DRIVING WHILE INTOXICATED FIRSTTX12300HEV002	Class B Dismissed	07/30/2008

In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations.

Step 2: Manage Items to Receive money

Case Search: 12-25: Gertrude, Chauntea

Choose and Add Items to Receive Money Filter Search Results All

Item	Party	Balance
<input checked="" type="checkbox"/> Cash \$250.00 Set	12-25 : Gertrude, Chauntea [DEF]	25.00
<input type="checkbox"/> Cash \$500.00 Posted	12-6 : Marcellus, Pholtus [DEF]	480.00

Add Selected Items for Receiving Money Collapse

Items to Receive Money

#	Date	Item Description	Party	Balance	Amount
				Amount to adjust	20.00
				Total Fixed Amount	0.00
				Total Auto Allocate	0.00

Court Trust
 Party Trust
 Fee

After selecting obligations, click [Add Selected Items for Receiving Money].

The **Items to Receive Money** panel should populate so you can enter the amount you would like to transfer to each obligation.

Step 2: Manage Items to Receive money

Case Search: 12-25: Gertrude, Chauntea

Choose and Add Items to Receive Money Filter Search Results All

Item	Party	Balance
<input type="checkbox"/> Cash \$500.00 Posted	12-6 : Marcellus, Pholtus [DEF]	480.00

Add Selected Items for Receiving Money Collapse

Items to Receive Money

#	Date	Item Description	Party	Balance	Amount
1	01/29/2021	Cash \$250.00 Set	12-25 : Gertrude, Chauntea [DEF]	25.00	20.00
				Total Fixed Amount	20.00
				Total Auto Allocate	0.00

Court Trust
 Party Trust
 Fee

Step 3: transfer information

The last step is to select values for the **Invoice Action** and **Reason** dropdowns, then enter **Comments**.

Step 3: Transfer Reason

Invoice Action: No Action (invoice remains open, fees will be due)

Reason*: Refund

Comments: Test

Transfer Clear

Click [Transfer].

Once the transfer is complete, navigate to the **Case Ledger** for cases and review the

changes. Use the ledger entries to follow the money trail. In the following images, note the original \$20 payment for **Bail** on the source case. It is now deducted and moved to the destination case.

Case Ledger

All Items ▼ All Types ▼

Bail								
Date	Account Name	Party/Payor	Party Type	Reference	Amount	Paid	Balance	
01/26/21	Cash \$500.00 Posted	Marcellus, Pholtus	Defendant	4	500.00	0.00	500.00	
01/26/21	Payment to Trust Deposit - Cash	Marcellus, Pholtus		GCD A -100000007.1 🔗		20.00		
01/27/21	Transfer to DA FEE, Refund	Marcellus, Pholtus		GCD A -100000008.1 🔗		-20.00		
01/29/21	Transfer from DA FEE, Refund	Marcellus, Pholtus		GCD A -100000011.1 🔗 (Original: GCD A -100000008.1) 🔗		20.00		
02/2/21	Transfer to 12-25, Refund	Marcellus, Pholtus		GCD A -100000020.1 🔗 (Original: GCD A -100000007.1) 🔗		-20.00		
Totals					500.00	0.00	500.00	

Case Ledger

All Items ▼ All Types ▼

Bail								
Date	Account Name	Party/Payor	Party Type	Reference	Amount	Paid	Balance	
01/29/21	Cash \$250.00 Set	Gertrude, Chauntea	Defendant	7	250.00	245.00	5.00	
01/29/21	Payment to Trust Deposit - Cash	Gertrude, Chauntea		GCD A -100000017.1 🔗		250.00		
01/29/21	Transfer to DA FEE, Refund	Gertrude, Chauntea		GCD A -100000018.1 🔗		-25.00		
02/2/21	Transfer from 12-6, Refund	Marcellus, Pholtus		GCD A -100000020.1 🔗 (Original: GCD A -100000007.1) 🔗		20.00		
Totals					250.00	245.00	5.00	

Refunds

A refund can be given when money needs to be returned to an individual that has already paid a fine or fee on a case.

Processing a refund is a multi-step process:

1. [Create](#) a refund request.
2. Have a different financial user [approve](#) the refund request.
3. [Send](#) the refund to the recipient.

Navigate to refunds

Refunds can be accessed from the [Cash Receipts](https://documentation.journaltech.com/eAttorney/user/financials/cash_receipts.html) [https://documentation.journaltech.com/eAttorney/user/financials/cash_receipts.html] page. Once on the **Cash Receipts** page, click **More Actions** in the bottom right corner and select **Refund and Disbursement**:

<input checked="" type="checkbox"/>	Date	Description	Party	Owed	Paid	Balance
Fine/Fees						
<input checked="" type="checkbox"/>	01/22/21	[FINE] Fine	Gregersen, Bob [CIT06]	55.00	45.00	10.00
Totals				55.00	45.00	10.00

Payment Methods Payment Date + Payment Method

Cash

Amount Tendered*

Paid	10.00
Remaining Balance	0.00
Overpayment	0.00
Change Due	0.00

Payor Information

Payor	Gregersen, Bob [CIT06]	Address	1	
Company		Address	2	
First Name	Bob	City		
Middle Name		State		
Last Name	Gregersen	ZIP		Tel <input style="width: 40px;" type="text"/>
Comments				

Submit

Clear All

More Actions

More Actions

Transfer

Refund and Disbursement

Receipt Ledger

Till Close

Till Detail

Create a refund request

After selecting the **Refund and Disbursement** option, the **Refund** screen shows:

Cash Receipts / Refund and Disbursement Till 012821-JA-7 | GeneralWPDA | General-WPDA | Jacob Adams | Opened 01/28/21

Step 1: Manage Items to Deduct Money

Case Search: 12-1: 2011-6

Choose and Add Items for Deduction Filter Search Results: All

<input type="checkbox"/>	Date	Item	Receipt No.	Party	Case, Payor Name and address	Alert	Paid
<input type="checkbox"/>	01/27/2021	Fine - Cash Cash	WPDA -100000005.1	Gregersen, Bob [CIT06]	12-1 : Gregersen, Bob		25.00
<input type="checkbox"/>	01/27/2021	Fine - Credit Card Credit Card	WPDA -100000006.1	Gregersen, Bob [CIT06]	12-1 : N/A 123 W 456 S, Logan, ID 84321-5678		15.00
<input type="checkbox"/>	01/27/2021	Fine - Check #548 Check #548	WPDA -100000006.1	Gregersen, Bob [CIT06]	12-1 : N/A 123 W 456 S, Logan, ID 84321-5678		5.00

Selected Items to Deduct Money

#	Date	Item Description	Receipt No.	Party	Case, Payor Name and address	Alert	Paid	Amount
							Total	0.00

Select Action

Start the refund by selecting the case payments that you would like to include in the refund. Do that by selecting the checkbox next to each payment to include.

After selecting the payments, click **[Add Selected Items for Deduction]** to add the payments to the refund request.

Cash Receipts / Refund and Disbursement Till 012821-JA-7 | GeneralWPDA | General-WPDA | Jacob Adams | Opened 01/28/21

Step 1: Manage Items to Deduct Money

Case Search: 12-1: 2011-6

Choose and Add Items for Deduction Filter Search Results: All

<input type="checkbox"/>	Date	Item	Receipt No.	Party	Case, Payor Name and address	Alert	Paid
<input type="checkbox"/>	01/27/2021	Fine - Cash Cash	WPDA -100000005.1	Gregersen, Bob [CIT06]	12-1 : Gregersen, Bob		25.00

Selected Items to Deduct Money

#	Date	Item Description	Receipt No.	Party	Case, Payor Name and address	Alert	Paid	Amount
1	01/27/2021	Fine - Credit Card Credit Card	WPDA -100000006.1	Gregersen, Bob [CIT06]	12-1 : N/A 123 W 456 S, Logan, ID 84321-5678		15.00	15.00 <input type="button" value="x"/>
2	01/27/2021	Fine - Check #548 Check #548	WPDA -100000006.1	Gregersen, Bob [CIT06]	12-1 : N/A 123 W 456 S, Logan, ID 84321-5678		5.00	5.00 <input type="button" value="x"/>
							Total	20.00

Select Action

The payments are added to the **Selected Items to Deduct Money** section. Review the payments and verify that everything is correct.

If everything looks good, click **[Next]** to fill in the payee information:

2	01/27/2021	Fine - Check #548 Check #548	WPDA-100000006.1	Gregersen, Bob [C1106]	12-1 : N/A 123 W 456 S, Logan, ID 84321-5678	5.00	5.00	x
<input type="button" value="+ Court Trust"/>							Total	20.00

▼

Step 2: Refund

Case Search: 12-1: 2011-6 🔍 🗨

Refund Items

#	Date	Item Description	Party	Balance	Amount		
1	01/28/21	Refund					
		Payee	<input type="text" value="x N/A (Payor)"/>	Address 1*	<input type="text" value="123 W 456 S"/>	<input type="text" value="0.00"/>	x
				Address 2	<input type="text"/>		
		Payee Name*	<input type="text" value="Gregersen, Bob"/>	City*	<input type="text" value="Logan"/>		
		Memo	<input type="text" value="WPDA-100000006"/>	State*	<input type="text" value="Idaho"/>		
				Zip*	<input type="text" value="84321"/> - <input type="text" value="5678"/>		
					Amount to adjust	20.00	
					Total Fixed Amount	0.00	
					Total Auto Allocate	0.00	

Refund Fee

Step 3: Transfer Reason

Invoice Action:

Reason*:

Comments:

Enter the payee information. You can select the payee from the case involvements by clicking in the **Payee** field and selecting the individual you would like to pay.



You can add multiple payees by clicking **[Refund]**.

Check #548	123 W 456 S, Logan, ID 84321-5678	Total	20.00
------------	-----------------------------------	-------	-------

+ Court Trust

Step 2: Refund

Case Search: 12-1: 2011-6 🔍

Refund Items

#	Date	Item Description	Party	Balance	Amount	
1	01/28/21	Refund				
		Payee	<input type="text" value="x N/A (Payor)"/>	Address 1*	<input type="text" value="123 W 456 S"/>	<input type="text" value="20.00"/>
				Address 2	<input type="text"/>	
		Payee Name*	<input type="text" value="Gregersen, Bob"/>	City*	<input type="text" value="Logan"/>	
		Memo	<input type="text" value="WPDA -100000006"/>	State*	<input type="text" value="Idaho"/>	
				Zip*	<input type="text" value="84321"/> - <input type="text" value="5678"/>	
					Total Fixed Amount	20.00
					Total Auto Allocate	0.00

Refund
 Fee

Step 3: Transfer Reason

Invoice Action: (dropdown menu open showing: No Action (invoice remains open, fees will be due), Rescind)

Reason*: (dropdown menu)

Comments:

Select Action:

To complete the refund request, enter an invoice action (**No Action** or **Rescind**), enter the reason for the refund, and optionally add comments about the refund. After filling in the required information, click [**Create Refund Request**] to create the refund request that somebody else must approve.

Approve a refund request

When a user creates a refund request, it must be approved by a different eAttorney user. The user that should approve the refund request must be a member of the **Financial General Workflow Role** or the **Financial Admin Workflow Role**. Those roles are [set by an administrator](#).

If a refund request exists, and the user wanting to approve a request is a member of the appropriate **Workflow Role**, then the refund request shows on their **Assignments** gadget on their **Dashboard**. It is labeled as **Approve Refund Request**:

Welcome, Test Account 2 Dashboard + ⚙

▾ Assignments ⚙ ⚙

Work Queue(2)	Open	!	UA	PD	TO	Tmw
Approve Refund Request ▶	0	0	1	0	0	0
Your Case Tasks ▶	0	0	5	0	0	0

▾ Cases ⚙ ⚙

Case Number	Case Name
No Recent Cases	

[View More...](#)

If the user clicks [▶], it assigns them the task and shows the **Refund Request** screen where they can approve or deny the refund request:

Refund Request					
Cases					
12-1: 2011-6 ↗					
Deductions					
#	Description	Payment	Receipt No.	Cap	Amount
1	Fine	Credit Card	WPDA -100000006.1 ↗	15.00	15.00
2	Fine	Check #548	WPDA -100000006.1 ↗	5.00	5.00
					Total Amount: 20.00
Fee, Disbursement and Refund					
#	Type	Description	Amount		
1	Refund	Refund Amount	20.00		
					Total Amount: 20.00
Payee					
Party	Gregersen, Bob 123 W 456 S Logan, ID 84321-5678				
Other					
Status	Requested				
Requested By	Jacob Adams				
Approved By					
Disbursement	No				
Reason	Refund				
Comments					
Deny Comments	<input type="text"/>				
<input type="button" value="Complete"/> <input type="button" value="Deny"/>					

To approve the refund request, the user must click **[Complete]**. Or, the user can choose to deny the request by adding comments to the **Deny Comments** field, then clicking **[Deny]**.

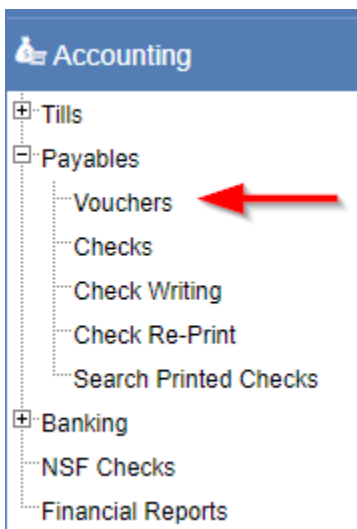
Once a refund request is approved, the refund can be sent to the payee.

Send a refund

After the refund request is created and approved, the refund can be sent to the individual. Typically, this is done by writing a check to the refund recipient. See https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html for details on how to complete that task.

Vouchers

A voucher is money you have in the system that needs to be sent out to some other entity. To show the existing vouchers or void vouchers, navigate to **Left navigation > Accounting > Payables > Vouchers**:



The **Voucher Search** screen shows.

Search for vouchers

Void Payables

Search Vouchers and Payables

Bank	<input type="text" value="Bank"/>	Check Status	<input type="text"/>	Voucher Status	<input type="text" value="Active"/>
Payee	<input type="text"/>	Check Number	<input type="text"/>	Voucher Number	<input type="text"/>
Case	<input type="text" value=""/> <small>✕</small>	Check Date	<input type="text"/> to <input type="text"/>	Voucher Date	<input type="text" value="01/25/2021"/> to <input type="text"/>
Vendor	No Lookup Available	Clear Date	<input type="text"/> to <input type="text"/>		

Search Results

<input type="checkbox"/>	Payee	Number	Case Number	Bank	Status	Reason	Date	Cleared	Amount	Paid	Balance
<input type="checkbox"/>	Gregersen, Bob	WPDAWPDA-100000002	12-1	Bank	Active	<input type="text"/>	01/26/21	25.00	0.00	25.00	

Results 1-1 of 1

If you are searching for a voucher, or all vouchers in a date range, enter the search criteria in the search fields and click **[Search]**.

In the **Search Results** section, you can view information about each voucher and navigate to the associated case. You can also void a voucher.

Void a voucher

To void a voucher, for example, in case of a clerical error you can do the following:

1. Search for the voucher you want to void.
2. In the **Search Results** section, click the checkbox next to the voucher you want to void.
3. Enter a reason for voiding in the **Reason** field.
4. Click **[Submit]**.

Write a check for a voucher

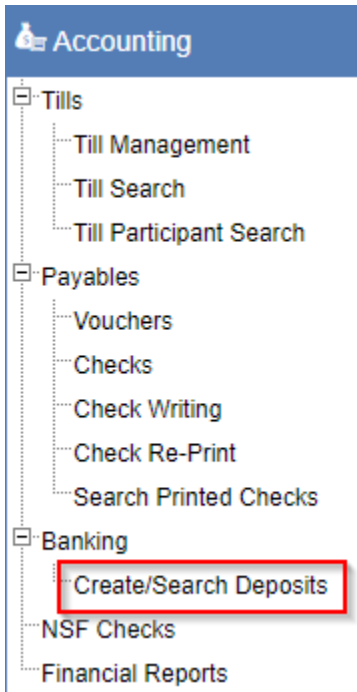
To write a check for an existing voucher, refer to https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html.

Deposits

Deposits are used to record money taken to the bank. Individual tills are added to a deposit and all the money in each till makes up the deposit total.

Navigate to deposits

Navigate to **Left navigation > Accounting > Create/Search Deposits**. If you do not have the **Accounting** section, contact your system administrator.



After clicking the link, the **Search Deposit** screen shows:

Search Deposit

Payment Center: All

Bank: Bank

Deposit Date*: 01/26/2021 To

Deposit Status*: All

Search Create New Bank Deposit Deposit Creator

Action	Payment Center	Bank	Deposit Date	Created	Deposit Status	Deposit to Bank	Deposit No.	Till Group	Prepared By	Amount	Reverse Amount
Search Results are empty											

On this screen, you can [create new deposits](#) and [search for and edit](#) existing deposits.

Search for and edit deposits

To search for existing deposits, enter your search criteria in the top section of the **Search Deposit** screen. This likely involves filling in the **Deposit Date** field and/or the **Deposit Status** field for the deposits you are trying to find.

After filling in the search criteria, click [**Search**] to run the search and show the deposits that match the search criteria:

Search Deposit

Payment Center: All

Bank: Bank

Deposit Date*: 01/26/2021 To

Deposit Status*: All

Search Create New Bank Deposit Deposit Creator

Action	Payment Center	Bank	Deposit Date	Created	Deposit Status	Deposit to Bank	Deposit No.	Till Group	Prepared By	Amount	Reverse Amount
	White Pine County District Attorney	Bank	01/26/21	01/26/21 9:12 PM	Closed	Yes	1		jadams	0.00	0.00
	White Pine County District Attorney	Bank	01/26/21	01/26/21 9:21 PM	Open	Yes	2	General-WPDA	jadams	65.00	0.00

In the **Search Results** section, you can:

- View the details of the deposit.
- Click the link in the **Deposit No.** column to open the [Deposit Details screen](#).
- Click the up or down arrow in the **Action** column to reopen or close a deposit.



The **edit** icon in the **Action** column also opens the [Deposit Details screen](#).

Deposit details screen

Use the **Deposit Details** screen to view and make changes to a deposit.



Only deposits with an **Open** status can be edited.

Deposit record saved

[Search Deposit](#) / [Edit Bank Deposit](#)

Payment Center	White Pine County District Attorney	Deposit Status	Open
Bank	Bank	For Deposit to Bank	Yes
Deposit Date	01/26/2021	Deposit No.	2
Created	01/26/21 9:21 PM		

> [Search and add tills to this bank deposit](#)

▼ [Tills in this bank deposit \(2 Tills present\)](#)

Action	Till Group	Till No	Till Date	Till Close Date	User	Till Status	Payments	Reconcile
	General-WPDA	012221-JA-1	01/22/21	01/22/21	jadams	Closed	1	
	General-WPDA	012621-JA-4	01/26/21	01/26/21	jadams	Closed	1	

▼ [Payment Reversals](#)

Payment Type	Till Group	Till No	Till Date	Till Close Date	User	Case	Status	Amount	Payment Deposits	Message
--------------	------------	---------	-----------	-----------------	------	------	--------	--------	------------------	---------

▼ [Payment Summary](#) Show Reconciliation Keyword

Payment Type	Till Mode	Till Group	Till No	Till Date	Till Close Date	User	Payments	Amount
There are no payments in this deposit								

[Go back to search deposit](#) [Close deposit](#)

To add new tills to an open **Deposit**:

1. Open the section titled **Search and add tills to this bank deposit**.

2. Search for the tills you want to add.
3. Select each till in the search results you want to add.
4. Finally, click **[Add till to deposit]**.

Create a deposit

There are two ways to create a deposit. You can use the [deposit creator wizard](#) or you can [manually create a new deposit](#).

Option 1: deposit creator wizard

Navigate to the **Search Deposit** screen and click **[Deposit Creator]** on the same row as the **[Search]** button. The **Deposit Creator** wizard starts.

The first step in the **Deposit Creator** is to search for and select the tills that should be added to the new deposit.

Search Deposit / Deposit Creator

Payment Center*
Till Date **To**

Till Status*
Till Close Date **To**

Show Advance Options

Select All <input checked="" type="checkbox"/>	Pmt. Center	Bank	Till Date	Close Dt	Till Group	Till No	User	Payments	Till Stat	Deposit Dt&St	Deposit No.
1 <input checked="" type="checkbox"/>	White Pine C	Bank	01/22/21	01/22/21	General-WPDA	012221-JA-1	jadams	1	Closed		
2	White Pine C		01/22/21	01/26/21	General-WPDA	012221-TM-2	jadams2	0	Closed		No payments for deposit to bank.
3	White Pine C		01/25/21	01/26/21	General-WPDA	012521-JA-3	jadams	0	Closed		No payments for deposit to bank.
4	White Pine C		01/26/21	01/26/21	General-WPDA	012621-JA-4	jadams	1	Closed		To prepare till for deposit click ↗
5	White Pine C		01/26/21		General-WPDA	012621-TM-5	jadams2	0	Open		Till is not closed.

To add the tills to the **Deposit**, follow these steps:

1. Enter the search criteria for the tills to add, then click **[Search tills]**.
2. Click the link icon in the **Deposit No.** column (#2).

3. Click [**Create New or Choose Existing Bank Deposit**] to advance to the next step of the **Deposit Creator** wizard.



Only tills that are closed and not already part of a **Deposit** can be added to a **Deposit**.

After selecting the tills you want to add to the deposit, you can then choose to add the tills to an existing **Deposit** record, or create a new deposit. The following screenshot shows how to create a new deposit:

Till Date	Close Dt	Till Group	Till No	User	Payments	Till Status
01/22/21	01/22/21	General-WPDA	012221-JA-1	jadams	1	Closed
01/26/21	01/26/21	General-WPDA	012621-JA-4	jadams	1	Closed

Search and add selected tills to existing bank deposit

Add selected tills to new bank deposit

Deposit Date:

For Deposit to Bank**

Note** If checked, money is deposited to bank. That is the default behavior. If not checked, it is considered legacy deposit. In that mode: 1. Money is not deposited to bank. 2. Deposit does not participate in bank reconciliation. 3. Payments in the deposit are not considered for agency disbursements.

To create a new **Deposit**, follow these steps:

1. Select **Add selected tills to new bank deposit**.
2. Select the **Deposit Date**.
3. If the **Deposit** should participate in bank reconciliation, select **For Deposit to Bank**.
4. Click [**Create New Deposit and add Tills**] to create the **Deposit** record.

Once you have created the deposit, the dialog closes and the till search screen shows. The tills that were added to the **Deposit** are highlighted green and there is a link in the **Deposit No.** column that you can click to show the [Deposit Details](#) screen:

Search Deposit / Deposit Creator

Payment Center* White Pine County District Attorney

Till Date 01/21/2021 To

Till Status* All

Till Close Date To

Search tills Go back to search deposit Show Advance Options

Select All <input checked="" type="checkbox"/>	Pmt. Center	Bank	Till Date	Close Dt	Till Group	Till No	User	Payments	Till Stat	Deposit Dt&St	Deposit No.
1	White Pine C	Bank	01/22/21	01/22/21	General-WPDA	012221-JA-1 ↗	jadams	1	Closed	01/26/21 Open	2 ↗
2	White Pine C		01/22/21	01/26/21	General-WPDA	012221-TM-2 ↗	jadams2	0	Closed		No payments for deposit to bank.
3	White Pine C		01/25/21	01/26/21	General-WPDA	012521-JA-3 ↗	jadams	0	Closed		No payments for deposit to bank.
4	White Pine C	Bank	01/26/21	01/26/21	General-WPDA	012621-JA-4 ↗	jadams	1	Closed	01/26/21 Open	2 ↗
5	White Pine C		01/26/21		General-WPDA	012621-TM-5 ↗	jadams2	0	Open		Till is not closed.

Create New Or Choose Existing Bank Deposit

Option 2: create deposit manually

Navigate to the **Search Deposit** screen and click **[Create New Bank Deposit]** next to the **[Search]** button. The **Deposit Creation** screen shows:

Search Deposit / Create New Bank Deposit

Payment Center* White Pine County District Attorney

Bank* Bank

Deposit Date* 01/26/2021 [📅](#)

Deposit Status Open

For Deposit to Bank**

Note** If checked, money is deposited to bank. That is the default behavior. If not checked, it is considered legacy deposit. In that mode: 1. Money is not deposited to bank. 2. Deposit does not participate in bank reconciliation. 3. Payments in the deposit are not considered for agency disbursements.

Save Bank Deposit Go back to search deposit

Fill in the information for the bank deposit. Make sure the **Deposit Date** field is correct, and select **For Deposit to Bank** if you want this deposit to participate in bank reconciliation.

After filling in the required information, click **[Save Bank Deposit]** to create the **Deposit**. The **Deposit Details** screen shows:

Deposit record saved

Search Deposit / Edit Bank Deposit

Payment Center	White Pine County District Attorney	Deposit Status	Open
Bank	Bank	For Deposit to Bank	Yes
Deposit Date	01/26/2021	Deposit No.	2
Created	01/26/21 9:21 PM		

> Search and add tills to this bank deposit

▼ Tills in this bank deposit (2 Tills present)

Action	Till Group	Till No	Till Date	Till Close Date	User	Till Status	Payments	Reconcile
	General-WPDA	012221-JA-1 ↗	01/22/21	01/22/21	jadams	Closed	1	
	General-WPDA	012621-JA-4 ↗	01/26/21	01/26/21	jadams	Closed	1	

▼ Payment Reversals

Payment Type	Till Group	Till No	Till Date	Till Close Date	User	Case	Status	Amount	Payment Deposits	Message
There are no payment reversals in this deposit.										

▼ Payment Summary Show Reconciliation Keyword

Payment Type	Till Mode	Till Group	Till No	Till Date	Till Close Date	User	Payments	Amount
There are no payments in this deposit								

Go back to search deposit Close deposit

On this screen, you can add new tills to the deposit and close the deposit when everything is final.

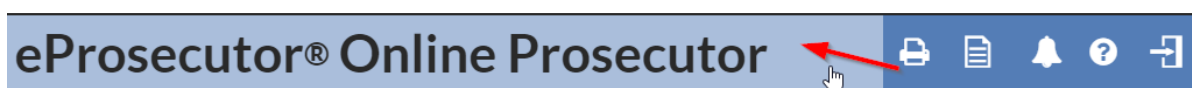
For information on how to add new tills, refer to the [Deposit Details screen](#).

Manage your user password

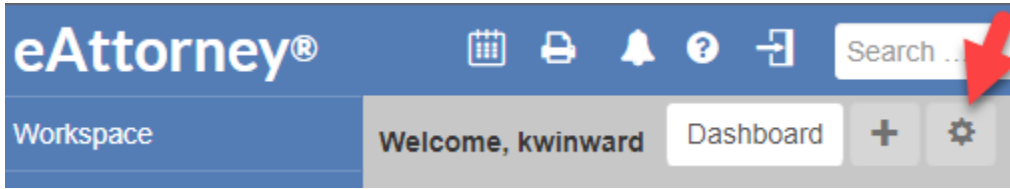
A user can change their password after logging in.

Procedure

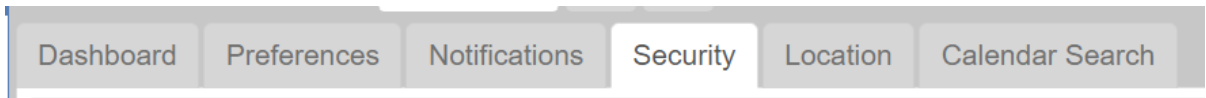
1. If you are on another page other than the **Dashboard**, click the banner link to take you to the **Dashboard**:



2. Click the **User Settings** icon, to the right of the **Dashboard** tab.



3. Click the **Security** tab on the Dashboard.

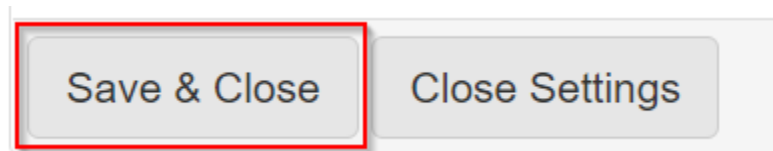


4. Enter your **Old password**, **New password**, and **Confirm new password** in the form.

My Account

Username	<input type="text"/>
Real Name *	<input type="text"/>
Email *	<input type="text"/>
Old password	<input type="password"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>

5. Click [**Save & Close**] to update the password:

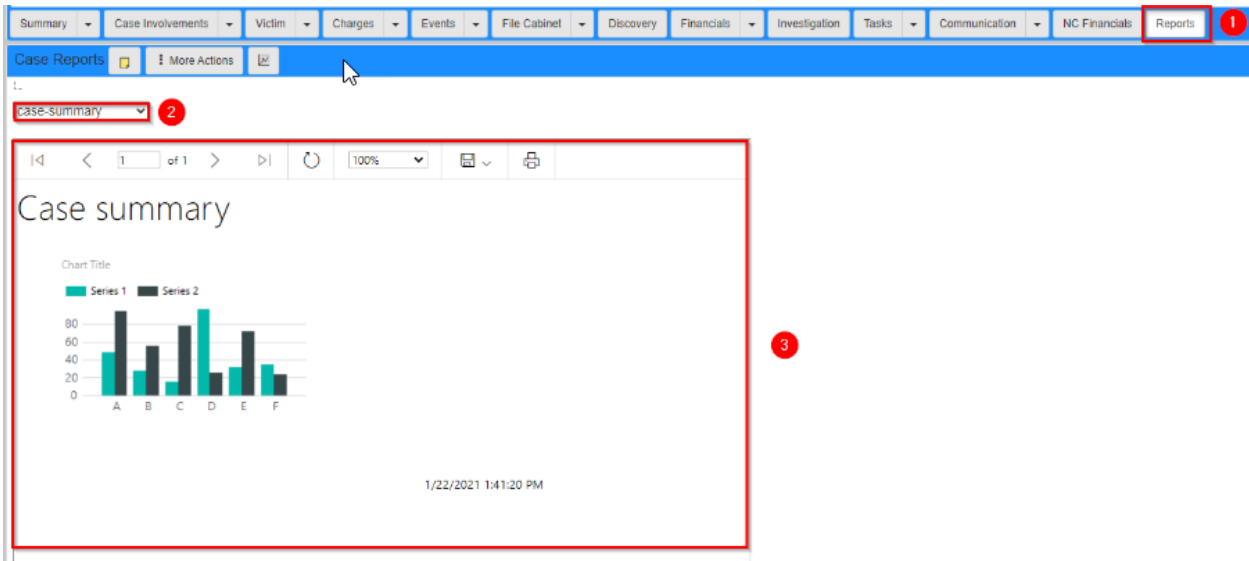


Reports

This section describes various kinds of reports that can be generated by eAttorney:

- <https://documentation.journaltech.com/eAttorney/user/reports/case.html>.
- <https://documentation.journaltech.com/eAttorney/user/reports/financial.html>.
- <https://documentation.journaltech.com/eAttorney/user/reports/person.html>.

Case reports



To show reports based on **Case** information:

1. Click the **Reports** tab in the **Case Folder View**.



To navigate to the **Case Folder View**, refer to [Cases](#).

2. Use the **dropdown** to select a report to show.

The system uses the **caseld** field in the **Case** entity to generate the report. When other values are required, the system opens a dialog so they can be entered.

3. Once selected, the report shows after the dropdown.



The administrator can set which report shows by default.

Default reports

Case summary

Provides a summary of **Case** components including involvements, charges, events, documents, and communication.

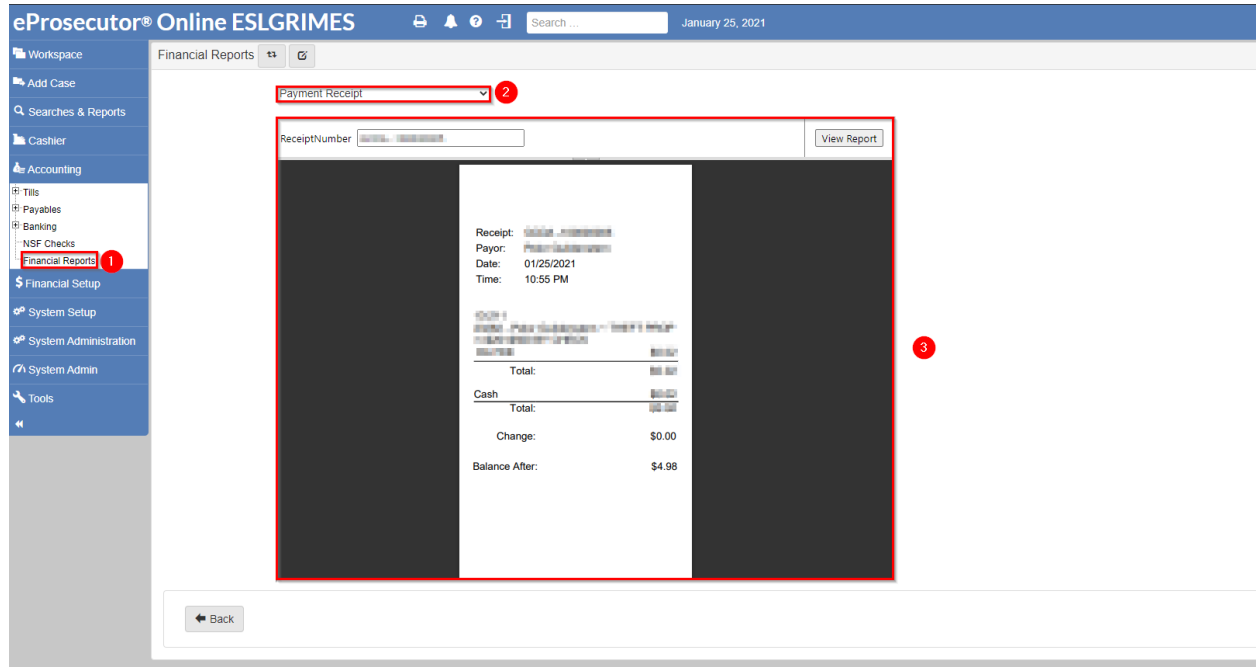
Case involvements

Provides a list of involvements and justice personnel on a **Case** along with their contact information.

Financial reports

Financial reports are accessible by users assigned to a security group with access to **Left**

navigation > Accounting. For more information, refer to [User navigation](#).



To show a report based on **Financial** information:

1. Navigate to **Left navigation > Accounting > Financial Reports**.
2. Use the **dropdown** to select a report to show.
3. Once selected, the report shows after the dropdown. When required, parameters must be entered before the report shows.

Person reports



To show a custom report based on **Person** information:

1. Click the **Reports** tab in the **Person Folder View**.



To navigate to the **Person Folder View**, refer to [Person](#).

2. Use the **dropdown** to select a report to show.

The system uses the **personId** and **nameId** fields in the **Person** entity to generate the report. When other value are required, the system opens a dialog so they can be entered.

3. Once selected, the report shows after the dropdown.



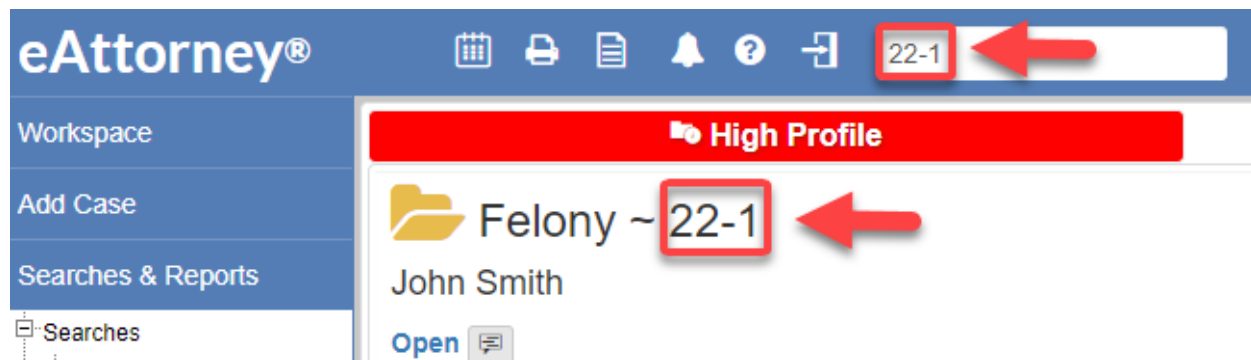
The administrator can set which report shows by default.

Searches

Top navigation search bar

The top navigation search bar allows quick-open access to known Case Numbers. The bar is visible at the top of the app at all times.

To open a known case in the case view, search for the case number in the Search Bar.



Case Numbers can be found in the Title of the case in the Case Header.

Search controls

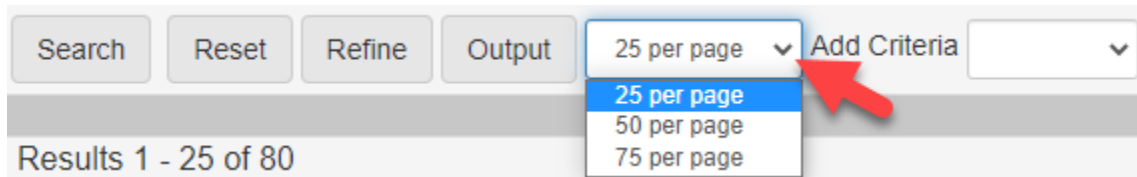
All of the searches listed in this section use the same set of controls:



1. Click [**Search**] to execute the search.
2. Click [**Reset**] to reset all parameters and controls to default values.
3. Click [**Refine**] to enable the [Refine controls](#) for all parameters.
4. Click [**Output**] to [Configure search output](#). This configuration controls how results are

shown by ordering, hiding, and grouping fields.

5. Select the results per page.



6. Select fields to configure [Extra criteria](#) that can narrow the search.
7. Click the **Disk Folder** icon to load a previously [saved search](#).

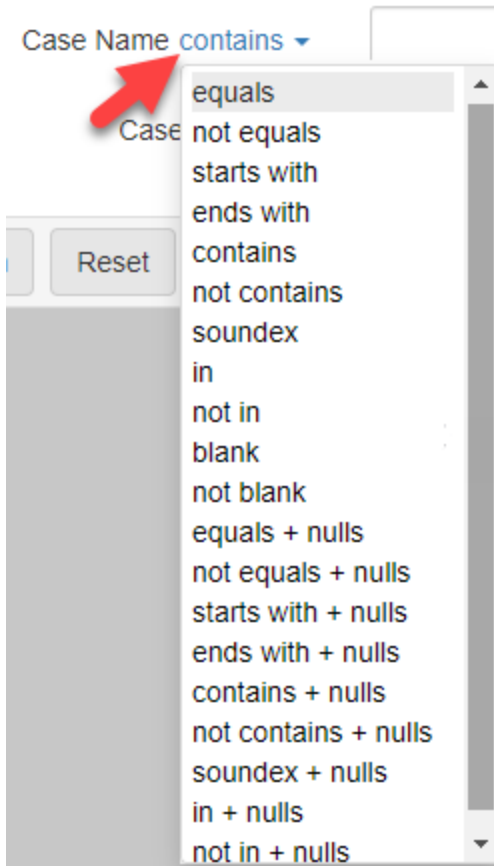


8. Click the **Disk Down Arrow** icon to save the search to your [Saved search gadget](#).



Refine controls

Clicking [**Refine**] adds value comparison controls to each parameter in your search.



Comparison type	Affect on column
not equals	Results do not equal this exact value.
starts with	Results start with this exact value.
ends with	Results end with this exact value.
contains	Results have this exact value.
not contains	Results do not have this exact value.
soundex	Results 'sound like' this value.
in	Results are in this value. See example.
not in	Results are not in this value. See example.
blank	Results are blank.
not blank	Results are not blank.

Comparison type	Affect on column
(Comparison Type) + nulls	Include null value results in addition to your applied comparison type.

Example of in and not-in comparison types

The **in** Comparison Type only works with multiselect dropdown values. This example shows how the results are limited to the selected status values of Adult Drug Court and Declined for lack of Investigation. No other Statuses are returned in this search.

▼ Search Case

Case Number **in** ▼

Case Name **contains** ▼

Case Type **in** ▼

Search
Reset
Less
Output
25 per page ▼
Add Criteria

Lookup List
✓ ▼

Felony	<input checked="" type="checkbox"/>
Investigation	<input type="checkbox"/>
Juvenile	<input type="checkbox"/>
Juvenile Jacket	<input type="checkbox"/>
Misdemeanor	<input checked="" type="checkbox"/>
Scheduling	<input type="checkbox"/>
FEL,MISD	<input type="checkbox"/>

Done

Configure search output

Click **[Output]** to show the **Result Columns** dialog:

Result Columns

Hide **1**

3 4 5 6 7 8

Show **2**

Case Number
Other Case Number(s)
Case Name
Case Type
Status
Received Date
Note Icon

Group By + **9**

Done

You can configure the search result output with the following:



1. The list of columns to hide from the search results.
2. The list of columns to show in the search results.
3. Click to move selected columns from **Hide** to **Show**.
4. Click to move all columns from **Hide** to **Show**.
5. Click to move selected columns from **Show** to **Hide**.
6. Click to move all columns from **Show** to **Hide**.
7. Click to move selected columns up one slot. Only works in the **Show** list.
8. Click to move selected columns down one slot. Only works in the **Show** list.
9. Use the **Group By** dropdown to select a result grouping based on one or more search parameters. The groupings and how they work differs between search types and involved parameters.

Group By +

Case Number
Case Name
Case Type
Status
Received Date


Select the desired parameter to group your results by in the dropdown.




Click the green [+] to add more groupings. When shown, click the red [-] to remove a grouping.

Group By  

Example of Group By results with Case Name and Case Type dual groupings*:

If grouping is used and there are multiple results which fall under the same grouping, an expansion opens in the results to show all items in that group. This example shows that four cases were found which match the same Case Title and the same Case Type:

Results 1 - 5 of 5 Expand Drilldowns 

	 Case Name	 Case Type	 Count
+	Lee, Karen	Juvenile	1
+	No PIP's (20-2)	Juvenile Jacket	1
+	Smith, Jane	Investigation	1
+	Smith, John	Felony	1
+	Smith, Mary	Felony	1

Results 1 - 5 of 5 Excel PDF Archive

Extra criteria

Use the dropdown to select **Case Id** or **Person Id**, which adds the selected field to the search form.



The **Additional Criteria** dropdown only shows on the **Search Case** and **Search Person/Business** searches.

In the following example, the **Person Id** is selected in the dropdown on the **Search Person/Business** dialog. The selection add the **Person Id** field to the search form. The **Person Id** is set to 2.

Search Person/Business

First Name / Business Name Date Of Birth

Last Name Person Type

Identification Number

Search Reset Refine Output 25 per page Add Criteria **Person Id**

Results 1 - 1 of 1

First / Business Name	Middle Name	Last Name	Date Of Birth	Identification(s)
Bilbo		Baggins	01/01/1942	DL # 8675309

Results 1 - 1 of 1

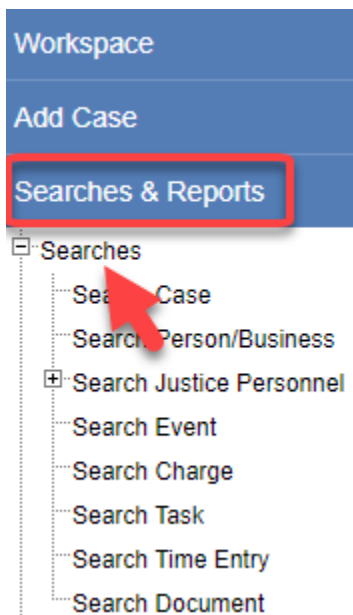
Excel PDF Archive

When the search executes, there is only one result because each **Person Id** is unique.

Search case

This search helps you find cases based on your search criteria.

The **Search Case** can be accessed by going to **Left navigation pane > Searches & Reports > Search Case**.



Parameters

Search Case

1 Case Number

2 Case Name

3 Case Type

4 Case Id

5 Status

Received Date to

Search Reset Refine Output 25 per page Add Criteria

1. **Case Number** - (Free Text) Search for case by Case Number.
2. **Case Name** - (Free Text) Search for case by Case Name.
3. **Case Type** - Limit results to selected Case types.
4. **Case Id** - (Free Text) Search for case records by Case Id. This is a special field added using Add Criteria. For more information on Criteria, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.
5. **Status** - Limit results to selected Statuses.
6. **Received Date From/To** - Limit results to Date Ranges.

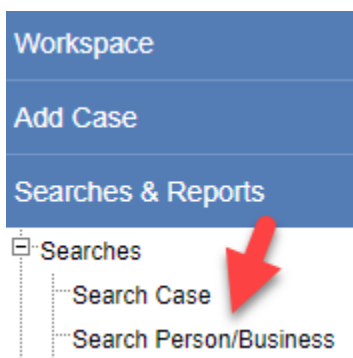


If you would like to change how parameters are being matched, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.

Search person/business

This search helps you find a person or business based on your search criteria. Click a result to show that name record.

The **Search Person/Business** can be accessed by going to **Left navigation pane > Searches & Reports > Search Person/Business**.



Parameters

Search Person/Business

1 First Name / Business Name

2 Last Name

3 Identification Number

4 Date Of Birth

5 Person Type

Search Reset Refine Output 25 per page Add Criteria

Person Id
Middle Name
Gender
Ethnicity

1. **First Name / Business Name** - (Free Text) Search for name by First/Business Name.
2. **Name Type** - Limit results to selected Name Types.
3. **Identification Type** - Limit results to selected Identification Types.
4. **Person Id** - (Free Text) Search for name records by Person Id. This is a special field added using Add Criteria. For more information on Criteria, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.
5. **Last Name** - (Free Text) Search for person/business by Last Name.
6. **Status** - Limit results to selected Statuses.
7. **Identification Number** - (Free Text) Search for person/business by Identification Number.

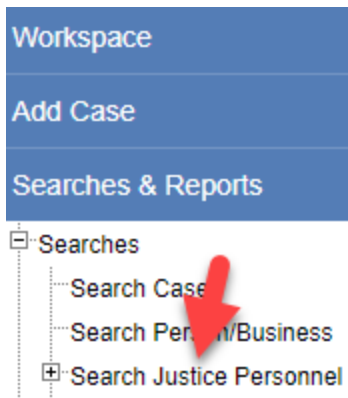


If you would like to change how parameters are being matched, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.

Search justice personnel

This search helps you find justice personnel name records. For example, Legal Staff or Defense Attorney.

The **Search Justice Personnel** can be accessed by going to **Left navigation pane** > **Searches & Reports** > **Search Justice Personnel**. Click the top level name and not the sub search Caseload.



Parameters

Search Justice Personnel

First Name **1** Role **2**

Last Name **3**

Search Reset Refine Output 25 per page

Share Print Download Refresh

1. **Role** - Limit results to selected Role Types.
2. **First Name** - (Free Text) Search for justice personnel by First Name.
3. **Last Name** - (Free Text) Search for justice personnel by Last Name.



If you would like to change how parameters are being matched, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.

Search justice personnel caseload

This search helps you find cases with involved justice personnel.

The **Search Justice Personnel Caseload** can be accessed by going to **Left Navigation Menu > Searches & Reports > Search Justice Personnel > Caseload**. Click the sub item [Caseload].

Workspace

Add Case

Searches & Reports

Searches

Search Case

Search Person/Business

Search Justice Personnel

Search Event

Search Charge

Search Task

Search Time Entry

Search Document

Parameters

Search Justice Personnel Caseload

1	Role	<input type="text"/>	3	Case Type	<input type="text"/>
2	Case Number	<input type="text"/>	4	Case Status	<input type="text" value="OPEN"/>

Search Reset Refine Output 25 per page

1. **Role** - Limit results to selected Role Types.
2. **Case Number** - (Free Text) Search for justice personnel cases by Case Number.
3. **Case Type** - Limit results to selected Case Types.
4. **Case Status** - Limit results to selected Case Statuses.

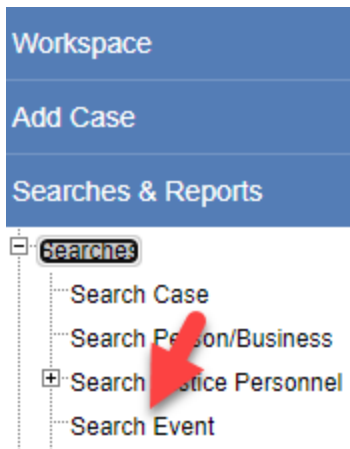


If you would like to change how parameters are being matched, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.

Search scheduled event

This search finds the corresponding cases of scheduled events based on your search criteria.

The **Search Scheduled Event** can be accessed by going to **Left navigation pane > Searches & Reports > Search Scheduled Event**.



Parameters

Search Event

1 Type 2 Location

3 Start Date to

Search Reset Refine Output 25 per page Add Criteria

1. **Type** - Limit results to selected Event Types.
2. **Start Date / To** - Requires values to be entered. Limit results to a Date Range.
3. **Status** - Limit results to selected Statuses.
4. **Location** - Limit results to a Location.



If you would like to change how parameters are being matched, see <https://documentation.journaltech.com/eAttorney/user/searches/controls.html>.

VOCA report

The VOCA report provides complete victim information to help with the Victims of Crime Act grant reporting.

The **VOCA Report** can be accessed by going to **Left navigation pane > Searches & Reports > VOCA Report**.



Parameters

Reports / VOCA Report - VOCA Report

Input Parameters

Start Date*	1	<input type="text"/>	
End Date*	2	<input type="text"/>	
Show Details		<input type="checkbox"/>	
Output Format	3	pdf	
4	5	6	7

Run Run in New Tab Run & Archive Save As Open

1. **Start Date / End Date** - Required. Limit results to a Date Range.
2. **Show Details** - Enable clickable hyperlinks in the report to take you to cases or names.
3. **Output Format** - Select the desired file type of the document to be generated.
4. ***Run** - Generate the report in the current active browser tab.
5. **Run in New Tab** - Generate the report in a new browser tab.
6. **Run & Archive** - Generate the report and archive it.
7. **Save As** - Save the report to your saved reports.

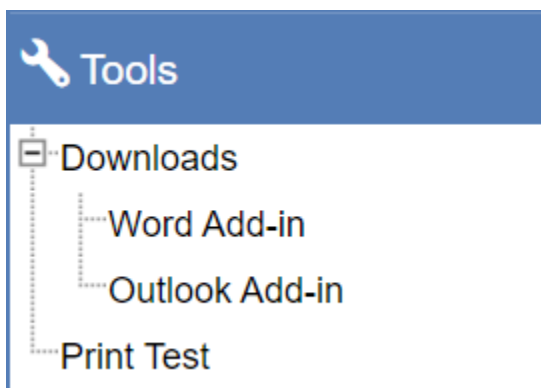
Tools

This section describes available tools:

- <https://documentation.journaltech.com/eAttorney/user/tools/downloads.html>.
- https://documentation.journaltech.com/eAttorney/user/tools/print_test.html.

Downloads

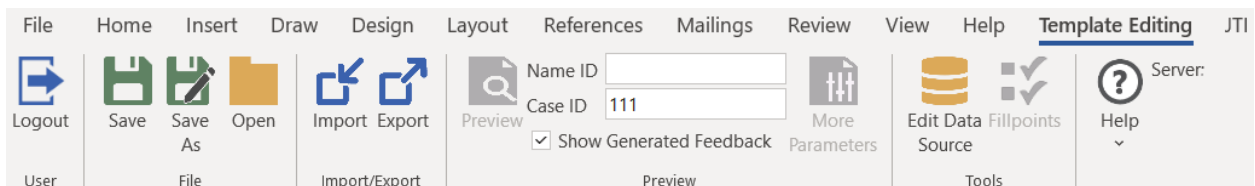
On the left navigation bar at **Tools > Downloads**, you can access the **Word Add-In** and the **Outlook Add-In** executables.



Word add-in

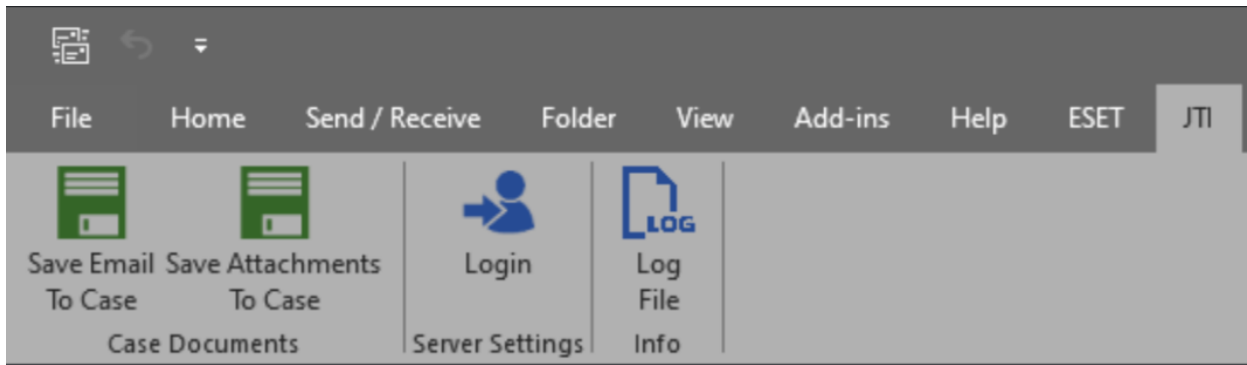
There are three main tasks that the **Word Add-In** is used for:

1. Uploads documents to cases (add new or overwrite existing).
2. Open, Create, and Save RTF templates using Template Fields defined in eAttorney.
3. Creates and updates tentative rulings.

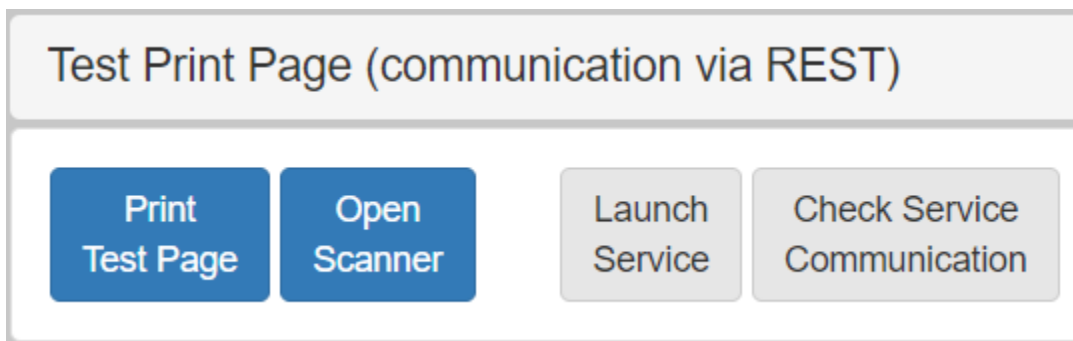


Outlook add-in

The **Outlook Add-in** allows you to save an email and/or its attachments to a Case.



Print test



The eAttorney scan and print service is a background service that runs on the client machine, and handles printing to the user local machine and scanning from the local machine into eAttorney. After launch, the service listens for print or scan requests and takes action when requests arrive.

Print test page

Test the Service by printing a test page.

Open scanner

Launch the scanning app.

Launch service

Launching the service should only occur once. If the service is running, you should see the EC icon in the user system tray:

Test Print Page (communication via REST)

Print
Test Page

Open
Scanner

Launch
Service

Check Service
Communication

Some modern browsers (Chrome, Firefox, or Edge) no longer support running Java Applets in the browser. For those users running a modern browser, start the service with a startup task:

```
javaws -Xnosplash http://<<server:port>>/<<context>>/document/ec-service.jsp
```

Example:

```
javaws -Xnosplash http://lasccivil-config.ecourt.com/sustain/document/ec-service.jsp
```

Using IcedTea:

```
javaws -Xtrustnone -headless -jnlp http://<<server:port>>/<<context>>/document/ec-service.jsp
```

Example:

```
javaws -Xtrustnone -headless -jnlp  
http://ecourtuatcu.lacourt.org/ecourt/document/ec-service.jsp
```

This command runs in the startup folder and is available in the latest 2016-sr2, not 2016-sr3, 2016-sr4+.

Check service communication

Test the communication to the service to make sure there are no connection issues.

If the service is running on the user computer, testing communication and print test page should complete quickly. If not, investigate the networking / firewall issue mentioned in [Troubleshooting](#).

Troubleshooting

Problems launching the service

Due to security restrictions, Microsoft Edge and Google Chrome no longer support running Java applets in the browser. For those users running Edge or Chrome, Journal Technologies, Inc. recommends launching the scan and print service when logging on (refer to the command to launch the service section). For browsers still supporting applets, like Internet Explorer, JTI recommends that you verify that Java is installed correctly. The easiest way to do that is to visit java.com [https://java.com/] and click [Do I have Java?]. If java.com [https://java.com/] successfully verifies that everything is installed correctly you should have no problems launching the service in eAttorney.



the service should only launch once.

If users see the service launches each time they try to print, then network issues are probably preventing proper communication between the server and user machines. See [Networking issues](#).

Networking issues

Due to security restrictions from the browser, these requests do not come from the browser itself but from the eAttorney app server. The eAttorney app server tries to access the scan service on the client machine. The network settings must be set up correctly for the eAttorney service to run fast / correctly. By default these requests come from the eAttorney server to the client machine port 8383. This port must not be blocked on the user firewall. Under normal firewall setup this port is not blocked for local network traffic.

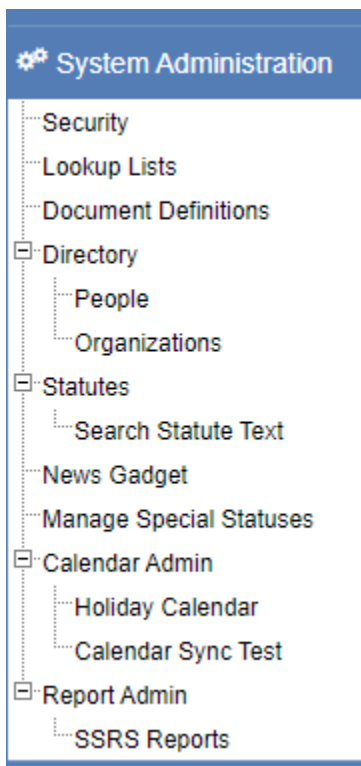
In addition, if the eAttorney server is not a local server but a hosted or remote server, the router/firewall from the remote location must be allowed through.

2. Administrator guide

As an administrator, you are able to manage the eAttorney environment in several ways, including:

- Managing users.
- Creating and modifying document definitions.
- Adding and editing items in lookup lists.

All of the tasks that an administrator can execute are found in the **System Administration** left navigation menu.



See the following sections for brief descriptions of each administration feature and links to detailed coverage.

Security

The Security link takes you to a screen for creating and updating [User accounts](#) and assigning them a [Security groups](#) and a [User navigation](#).

Lookup lists

Lookup Lists are the items that show in dropdown boxes in eAttorney. To add, change, and delete items, see [Lookup lists](#).

Document definitions

[Document definitions](#) are the different document types used when uploading or generating documents on a Case or Person record. The Document Definitions link in the System Administration menu gives you access to make changes, upload templates, and create new Document Definitions.

Directory

The Directory allows you to change people and organizations that are used throughout eAttorney.

Statutes

Manage the [Statutes](#) that are used when you add charges to a Case.

Checklist

Manage [Checklists](#) used in the Case Task screen.

News gadget

Add content for the [News gadget configuration](#) that can be added to a user dashboard.

Manage special statuses

This is for managing Case and Person [Managing special statuses](#). A Special Status can show in the header on a Case or Person record and can be various different colors so the special statuses can be easily identified when a record is opened.

Calendar

The [Calendar administration](#) section is used for managing the holidays observed by your agency or for testing calendar sync with Microsoft Exchange or Google Calendar.

Report administration

This takes you to a page where you can view and execute all the https://documentation.journaltech.com/eAttorney/admin/report_admin.html for your agency.

Users and security

This section describes the administrative features that manage user accounts and the permissions granted to them:

<https://documentation.journaltech.com/eAttorney/admin/users/accounts.html>

Learn how to create user accounts, and then manage them.

<https://documentation.journaltech.com/eAttorney/admin/users/navigation.html>

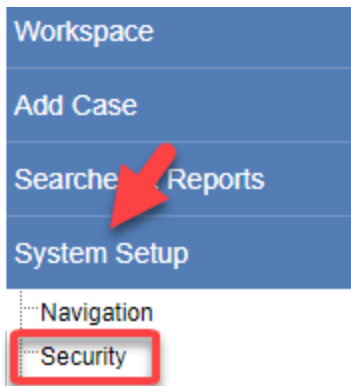
Learn how to manage navigation for users.

https://documentation.journaltech.com/eAttorney/admin/users/security_groups.html

Learn how to set permissions for users by group.

User accounts

To access the **User Accounts** screen, navigate to **Left navigation** › **System Setup** › **Security**, then click the **Users** tab.



Create a new user

On the **Users** page, click [**New User**] at the bottom of the page. The **Create New User** page shows.

Fill in the information for the user:

- **Username:** The username used by the new user to login to eAttorney.
- **Real Name:** The real name of the person using the system.
- **Directory Person:** This user account can be linked to a **Directory Person** by searching for the **Directory Person** in this field. If the user account is associated with a **Directory Person**, the system populates the **Real Name** field.
- **Email:** This is the user email address. When the new account is created, an account creation email is sent to this email address so the user can finish setting up their account. Password reset requests are also sent to this email.
- **Security Group:** Permissions can be given to the user according to the [Security Group](#) they are assigned to.

An asterisk indicates a required field.

Manage user accounts

As an administrator, you can delete user accounts, reset passwords, and updating user permissions.

Delete user accounts

1. Navigate to **Left navigation pane** > **System Setup** > **Security** > **Users**.
2. Search for the user account you want to delete.
3. Click the username of the user.
4. On the **User Account Settings** page, click [**Delete**] at the bottom of the form.

5. You are prompted to confirm that you want to delete the user. Click **[OK]** to delete the account.

Reset passwords

1. Navigate to **Left navigation pane > System Setup > Security > Users**.
2. Search for the user account whose password must be reset.
3. Click the username of the user.
4. On the **User Account Settings** page, click **[Reset]** on the **Password** field.
5. You are prompted to confirm that you want to reset the user password. Click **[OK]** to reset the password. An email is sent to the user email address with a link to reset their password.

Update user permissions

1. Navigate to **Left navigation pane > System Setup > Security > Users**.
2. Search for the user account you want to update.
3. Click the username of the user.
4. On the **User Account Settings** page, change the **Security Group** of the user. A description of the permissions available to each security group can be found [here](#).
5. Click **[Save]** at the bottom of the form.

Workflow roles

It may be required to set the **Workflow Roles** for some users. If a user is working with **Financials**, then they likely need to be assigned the **Financial General Workflow Role** or **Financial Admin Role**, if they should administer financials or not.

The **Financial Workflow Roles** grant access to workflows such as approving refund requests.

To set the **Workflow Roles**:

1. Navigate to **Left navigation pane > System Setup > Security > Users**.
2. Search for the user account you want to update.
3. Click the username of the user.
4. On the **User Account Settings** page, click the **Profile/Workflow Options** tab.
5. Fill in the **Workflow Roles** field, then click **[Save]**.

Security / jadams

General Profile / Workflow Options Advanced Options

Location Select Courthouse

Workflow Roles

LOCATION1

Attributes

Key	Value
<input type="text"/>	<input type="text"/>

Save Delete Back to Person Back to Security Test Access

User navigation

The menus available to a user on the [left navigation](#), [case navigation](#), and [person navigation](#) are determined by their user navigation settings. The navigation settings are determined by the [security group](#) the user is a member of.

The following tables describe menus that are available to each security group.

Left navigation

This is a table that has the security groups in rows, and the [left-side navigation menus](#) in the columns. A check mark in a cell means that the security group in the row has access to the navigation menu in the column.

Security Group	Accounting	Add Case	Cashier	Financial Setup	Searches & Reports	System Administration	Tools	Workspace
General User		✓			✓		✓	✓
General_Financial		✓	✓		✓		✓	✓
General_Seal		✓			✓		✓	✓
General_Seal_Financial		✓	✓		✓		✓	✓

LocalAdminUser						✓	✓	
PowerUser		✓			✓		✓	✓
Power_Financial	✓	✓	✓	✓	✓		✓	✓
Power_Seal		✓			✓		✓	✓
Power_Seal_Financial	✓	✓	✓	✓	✓		✓	✓
Super		✓			✓	✓	✓	✓
Super_Financial	✓	✓	✓	✓	✓	✓	✓	✓
Super_Seal		✓			✓	✓	✓	✓
Super_Seal_Financial	✓	✓	✓	✓	✓	✓	✓	✓
ViewOnly					✓		✓	✓

Case navigation

This is a table that has the security groups in rows, and the [case navigation menus](#) in the columns. A check mark in a cell means that the security group in the row has access to the navigation menu in the column.

Security Group	Case Menus	Case Financial Menus*	Case Sealing Menus
GeneralUser	✓	✓	
General_Financial	✓	✓	
General_Seal	✓	✓	✓

General_Seal_Financial	✓	✓	✓
LocalAdminUser			
PowerUser	✓	✓	
Power_Financial	✓	✓	
Power_Seal	✓	✓	✓
Power_Seal_Financial	✓	✓	✓
Super	✓	✓	
Super_Financial	✓	✓	
Super_Seal	✓	✓	✓
Super_Seal_Financial	✓	✓	✓
ViewOnly	✓	✓	

- Only available if the environment is configured to use financials.

Person navigation

This is a table that has the security groups in rows, and the [person navigation menus](#) in the columns. A check mark in a cell means that the security group in the row has access to the navigation menu in the column.

Security Group	Person Menus	Person Financial Menus*
GeneralUser	✓	✓
General_Financial	✓	✓
General_Seal	✓	✓
General_Seal_Financial	✓	✓
LocalAdminUser		
PowerUser	✓	✓

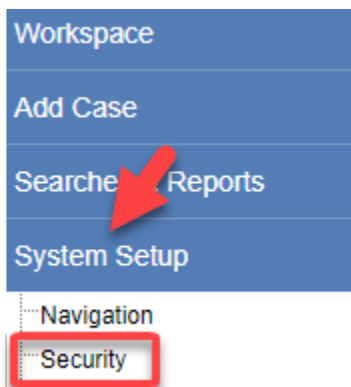
Power_Financial	✓	✓
Power_Seal	✓	✓
Power_Seal_Financial	✓	✓
Super	✓	✓
Super_Financial	✓	✓
Super_Seal	✓	✓
Super_Seal_Financial	✓	✓
ViewOnly	✓	✓

- Only available if the environment is configured to use financials.

Security groups

Security groups let you configure permissions for groups of users with similar roles.

To configure security groups, navigate to **Left navigation pane > System Setup > Security**, then click the **Groups** tab.



Permissions

A security group is a set of permissions in the system that can be applied to individual users.

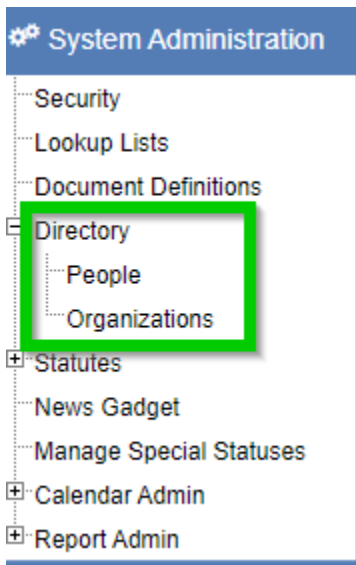
The default security groups and the permissions granted to each:

Security group privilege	Administrator	General user	Power user	Read-only user	Super user
Access Sealed Case					✓
Case bifurcate and consolidate			✓		✓
Configure dashboard		✓	✓		✓
Create case component		✓	✓		✓
Create person component		✓	✓		✓
Delete case component			✓		✓
Delete person component			✓		✓
Download case component		✓	✓		✓
Read case component		✓	✓	✓	✓
Read person component		✓	✓	✓	✓
Search and report		✓	✓		✓
Send email		✓	✓		✓
Update case component		✓	✓		✓

Security group privilege	Administrator	General user	Power user	Read-only user	Super user
Update person component		✓	✓		✓
Administrator	✓				

Directory

The directory consists of [Persons](https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html) [https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html] and [Organizations](https://documentation.journaltech.com/eAttorney/admin/directory/org_unit.html) [https://documentation.journaltech.com/eAttorney/admin/directory/org_unit.html]. [Persons](https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html) [https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html] and [Organizations](https://documentation.journaltech.com/eAttorney/admin/directory/org_unit.html) [https://documentation.journaltech.com/eAttorney/admin/directory/org_unit.html] include all people that are part of agencies and organizations that work with you as the customer, such as police and sheriff departments, probation offices, courts, and attorney offices. If a person is not a victim, witness, plaintiff, defendant, or other such involvement on a case, they are likely to be in Directory.



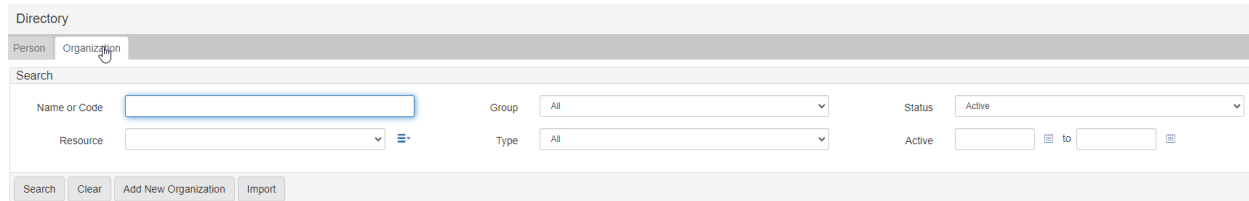
For information on how directory persons are used on cases, and added through the case screen, see [Summary](#).

Directory organization

Directory organization

A **Directory Organization** is a non-person entity that is part of the justice system. They can represent a court, a law enforcement agency, a prosecutor office, or other organization that needs to be tracked.

Searching for a directory organization



The screenshot shows a web interface for searching directory organizations. At the top, there are tabs for 'Person' and 'Organization', with 'Organization' selected. Below the tabs is a search bar with the text 'Search'. The search criteria are organized into several fields: 'Name or Code' (text input), 'Resource' (dropdown menu), 'Group' (dropdown menu), 'Type' (dropdown menu), 'Status' (dropdown menu), and 'Active' (date range input with 'to' separator). At the bottom of the search area, there are four buttons: 'Search', 'Clear', 'Add New Organization', and 'Import'.

Criteria:

- **Name or Code:** Enter the name or code of the organization.
- **Group:** Use to filter results.
- **Status:** Select the current status of the organization, one of:
 - **All**
 - **Active**
 - **Inactive**
- **Resource:** Use to filter results.
- **Type:** Select the type of the organization, one of:
 - **All**
 - **Court**
 - **Defense**
 - **Law Enforcement**
 - **Non-Agency Specific**
 - **Probation, Parole, Pretrial, Other**
 - **Prosecutor**
- **Active:** Start and end date of activity for the organization.

Buttons:

- **[Search]:** Execute the search, with no criteria, to return a paginated list.
- **[Clear]:** Reset search criteria.
- **[Add new organization]:** Opens the form to add a new Directory Organization.

- **[Import]**: Import a Excel spreadsheet of organizations.

Add a directory organization

To add a new Directory Organization, click **[Add New Organization]**:

- **Org. Type:** Select the organization type choosing from:
 - **Court**
 - **Defense**
 - **Law Enforcement**
 - **Non-Agency Specific**
 - **Probation, Parole, Pretrial, Other**
 - **Prosecutor**
- **Name:** The name of the organization.
- **Short Name:** The shortened version of the name, sometimes displayed on screens and can be used in documents and reports.
- **Code:** Unique code for the organization. If you do not want to come up with one, use the **[Generate]** button to generate one for you.

Code*

- **Start Date:** Date this organization is available in dropdowns in the system.
- **End Date:** Date this organization is no longer available in dropdowns in the system.
- **Status:** Defines if the organization is active or inactive. One of: **Active, Inactive**

- **Web address**: the website for the organization.
- **Email**: email for the organization.
- **Notes**: notes relating to the organization.
- **Phone 1, Phone 2 and Phone 3**:

Phone 1

- Choose the phone type: **Cell Phone**, **Fax**, **Home Phone**, **Work Phone**
- Enter the ten digit phone number.
- Optionally enter the extension.

Org. Type, **Name**, and **Code** are all required.

Optional items

Optionally, you can add:

- <https://documentation.journaltech.com/eAttorney/admin/directory/identifications.html> for an organization.
- **Address**
- **Contact**
- **Personnel** (<https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html>)
- **Resources**
- **Attachments**
- **Attributes**

Bulk importing directory organizations

Click **[Import]** to enter the format of the requisite Excel file for bulk import. The window also includes a link to a sample file with the required column headers. Click **[Choose File]** at the top to choose the file to import. Click **[Import]** on the lower right to start the import.

Import Directory Organization XLS File

File: No file chosen

File Format: Excel XLS [\(Click here to download a sample file with column headers.\)](#)

The first row of the file must have these column headers:

ORG/LOC (use > to indent, DIR_ORG_TYPE for first level organizations, DIR_ORG_DIVISION for non-first level records)|TYPE|CODE|NAME|NOTES|TELEPHONE1 TYPE|TELEPHONE1 NUMBER|TELEPHONE2 TYPE|TELEPHONE2 NUMBER|ADDRESS TYPE|ADDRESS 1|ADDRESS 2|CITY|STATE|ZIP|COUNTRY|EMAIL

Required Column Values

ORG/LOC (Organization or Location)	TELEPHONE1 TYPE (required if importing telephone 1)
TYPE (must match values in the DIR_ORG_TYPE lookup list)	TELEPHONE2 TYPE (required if importing telephone 2)
CODE (must be unique)	ADDRESS TYPE (required if importing address)
NAME	

Related Organization Import

To import related organizations (courts, districts, courthouses, courtrooms, etc.) use the > symbol in at the beginning of the ORG/LOC label to indicate whether the row is for an organization or location. Each > indicates which level of the hierarchy the row belongs to. (I.e., the >> organization entry belongs to the > organization entry.)

Organizations include the agency (court, district attorney, defender, etc.) and divisions, while locations indicate offices (courthouse, building, etc.) and rooms.

ORG/LOC	TYPE	CODE	NAME
Organization	COURT	COUNTY_COURT	County Court
>Organization	DISTRICT	EAST_DISTRICT	Eastern District
>>Location	COURTHOUSE	EAST_DISTRICT_CRTHSE	East Main Courthouse
>>>Location	ROOM	EAST_DISTRICT_CRTHSE_CTRM1	Courtroom 1
>>>Location	ROOM	EAST_DISTRICT_CRTHSE_CTRM2	Courtroom 2

Edit a directory organization

If you click an organization name, the **Update** form is shown:

Directory / Some Directory Organization

Information Profiles Off-Time Personnel Resource Attachments Attributes

Organizations

Group: All

Org. Type*: Defense

Name*: Some Directory Organization

Short Name:

Code*: AGA

Start Date:

End Date:

Status: Active

Web Address:

Email:

Notes:

Phone 1:

Phone 2:

Phone 3:

Exclude From Config Management

> Identifications

Other Addresses:

Contact:

- **Org. Type:** choose the organization type choosing from:
 - Court
 - Defense

- Law Enforcement
 - Non-Agency Specific
 - Probation, Parole, Pretrial, Other
 - Prosecutor
- Name: The name of the organization.
 - Short Name: The shortened version of the name, sometimes shown on screens and can be used in documents and reports.
 - Code: Unique code for the organization. If you do not want to come up with one, click **[Generate]** to generate one for you.

Code*

- Start Date: Date this organization is available in dropdowns in the system.
- End Date: Date this organization is no longer available in dropdowns in the system.
- Status: Defines if the organization is active or inactive. One of: **Active**, **Inactive**
- **Web address**: the website for the organization.
- **Email**: email for the organization.
- **Notes**: notes relating to the organization.
- **Phone 1, Phone 2 and Phone 3**:

Phone 1

- Choose the phone type: **Cell Phone**, **Fax**, **Home Phone**, **Work Phone**
- Enter the ten digit phone number.
- Optionally enter the extension.

Org. Type, **Name**, and **Code** are all required.

Optional items

Optionally, you can add:

- <https://documentation.journaltech.com/eAttorney/admin/directory/identifications.html> for an organization.
- **Address**

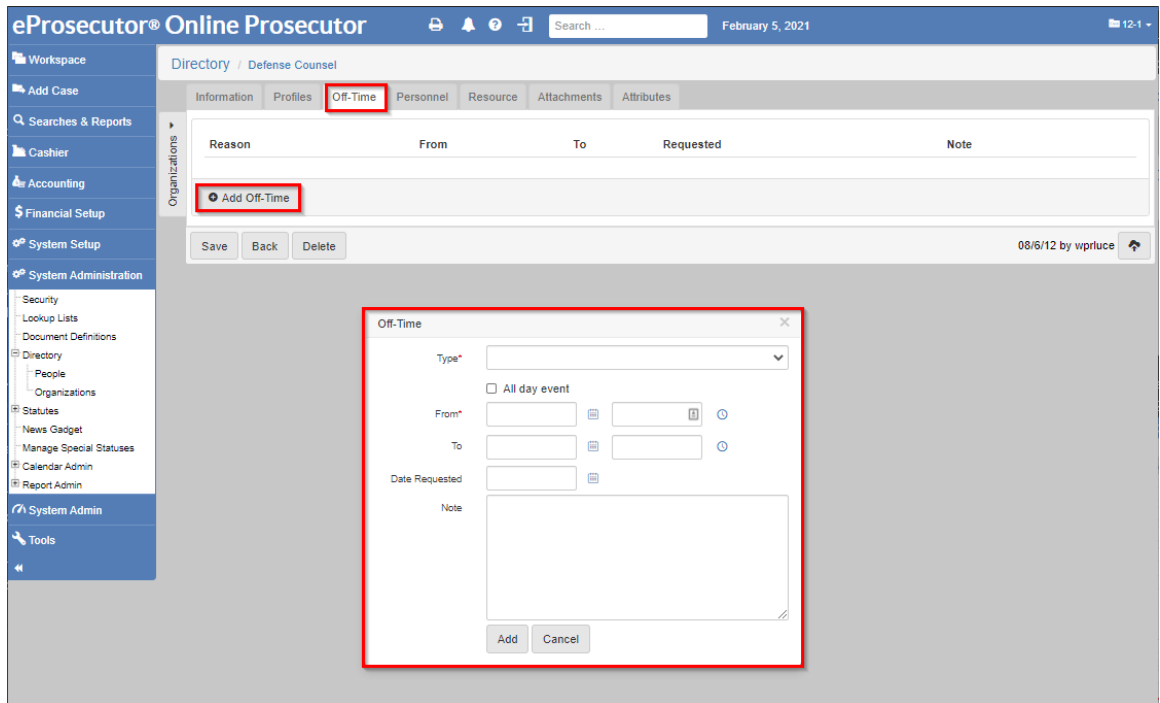
- **Contact**
- **Off-time**
- **Personnel** (**Directory Persons** [<https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html>])
- **Resources**
- **Attachments** [<https://documentation.journaltech.com/eAttorney/admin/directory/attachment.html>]
- **Attributes** [<https://documentation.journaltech.com/eAttorney/admin/directory/attribute.html>]
 - **Addresses** - Addresses can be added by clicking [**Add Address**] (1) and filling out the form that shows (2).

The screenshot displays the 'eProsecutor® Online Prosecutor' interface. The main content area is titled 'Organization' and includes tabs for 'Information', 'Personnel', 'Resource', 'Attachments', and 'Attributes'. The 'Information' tab is active, showing fields for Group, Org. Type, Name, Short Name, Code, Start Date, End Date, Status, Web Address, Email, Notes, Phone 1, Phone 2, Phone 3, and an 'Exclude From Config Management' checkbox. Below this is the 'Identifications' section, which contains two sub-forms: 'Other Addresses' and 'Contact'. The 'Other Addresses' form is highlighted with a red box and a red circle with the number '2'. It includes fields for Address, City, State, ZIP, Country, and From/To, along with a 'Use as Mailing Address' checkbox. The 'Contact' form is also visible, with fields for Name, Position, Email, and Phone, and an 'Add Contact' button. A red box and a red circle with the number '1' highlight the 'Add Address' button at the bottom of the 'Other Addresses' form.

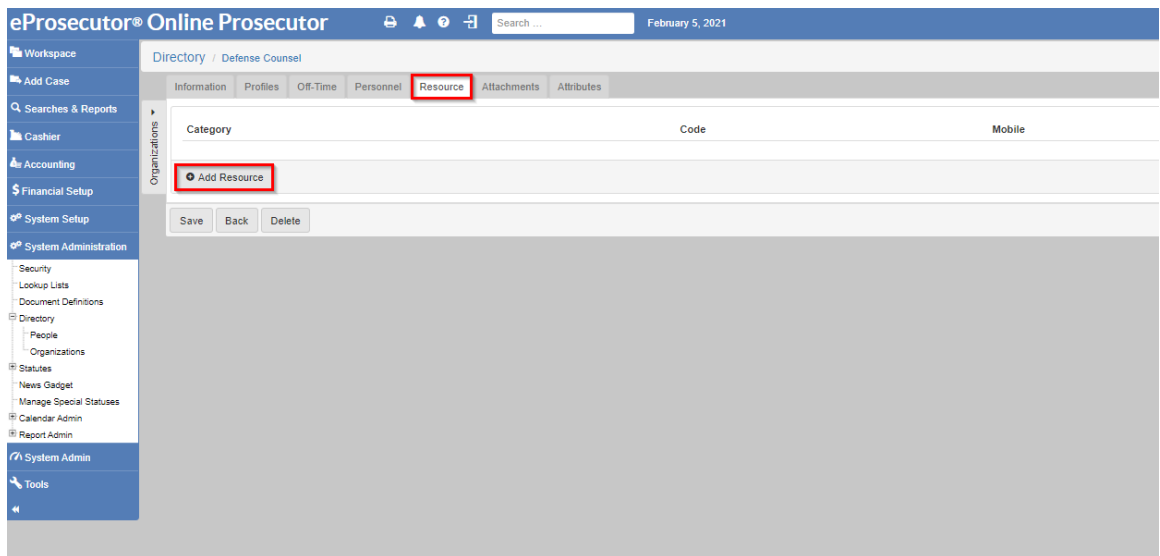
- **Contact** - Contacts can be added by clicking [**Add Contact**] (1) and filling out the form that shows (2).

The screenshot displays the 'Organization' configuration page in the eProsecutor Online Prosecutor application. The interface includes a top navigation bar with the application name, date (February 4, 2021), and a search bar. A left sidebar contains a menu with options like 'Workspace', 'Add Case', 'Searches & Reports', 'Cashier', 'Accounting', 'Financial Setup', 'System Setup', and 'System Administration'. The main content area is divided into tabs: 'Information', 'Personnel', 'Resource', 'Attachments', and 'Attributes'. The 'Information' tab is selected, showing various input fields for organization details. A 'Generate' button is located next to the 'Code' field. Below the main form, there are sections for 'Other Addresses' and 'Contact'. The 'Contact' section is highlighted with a red border, and a red circle with the number '1' points to the 'Add Contact' button. Another red circle with the number '2' points to the 'New Contact' dropdown menu in the contact section.

- **Off-Time** - Off time for an organization can be added using the off-time tab and clicking [Add off-time]:



- **Resources** - Resources can be found and added to a **Directory Organization** under the resources tab:



Move an organization

Organizations can be moved from one organization to another using the move to function located under **Organizations** on the left hand side, near the left navigation, (1).

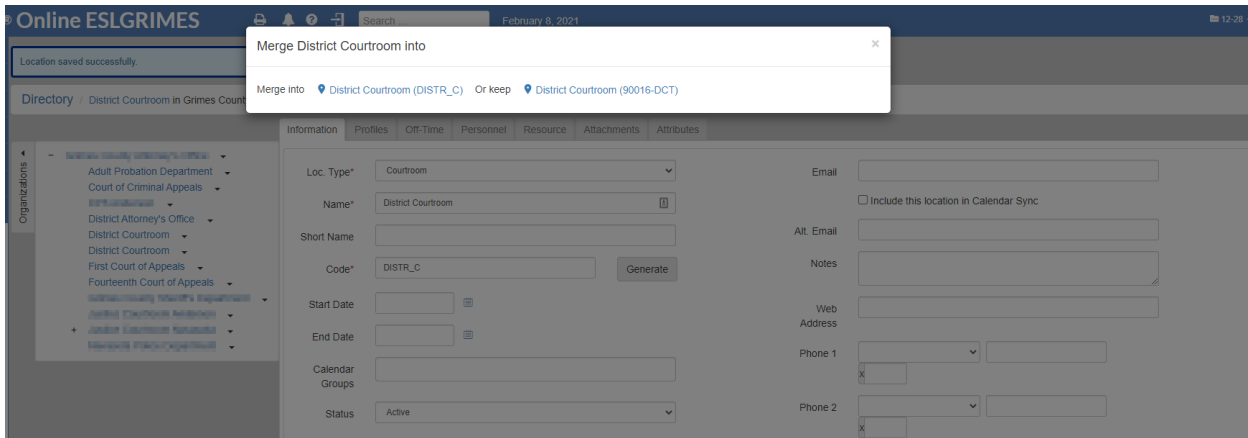
Organization Name (2) → **Move to** (6). Using this feature allows you to mimic the physical structure of an organization or building.

Merge organizations

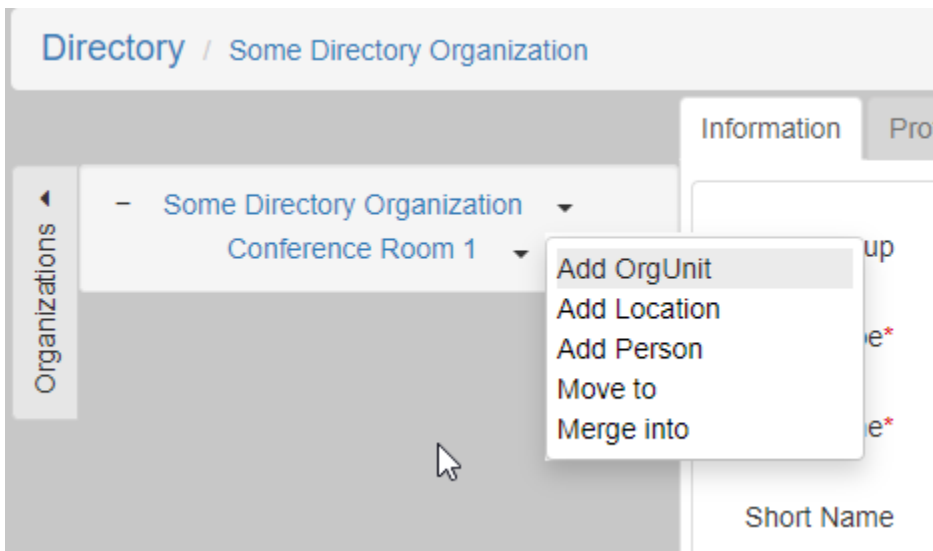
If there are two existing organizations with the same name, a merge operation may be performed to combine the two organizations into one.

To merge two organizations choose one of the duplicated organizations from **Organizations** on the left hand side, near the left hand side navigation, (1).

Organization Name (2) → Merge into (7). A dialog opens asking which organization to keep ("keep" merges existing organization into current, "merge" takes current and merges into existing organization).



Also, one can create more details of an organization including Divisions (sub OrgUnit), Locations, Persons using the expanded Organizations panel. In the following image, the organization has a location named **Conference Room 1**:



Add an orgunit

Orgunits are subordinate organizations in an organization and can help organize the organization.

To add an orgunit from the organization click [**Organizations**] on the left hand side, near the left navigation pane, (1) **Organization Name** (2) > **Add OrgUnit** (3).

Add a location

Multiple locations can be added in an organization. To add a location from the organization click **Organizations** on the left hand side, near the left hand side navigation, (1) **Organization Name** (shown as 2 below) > **Add Location** (4).

Add a person

Adding a person can be done directly on a directory organization auto filling the individuals organization. To add a person from the organization click [**Organizations**] on the left hand side, near the left navigation pane, (1) **Organization Name** (2) > **Add Person** (5). The **Add Person** navigation shows the add new directory person screen.



For more information on Directory Person, see <https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html>.

The screenshot displays the 'eProsecutor® Online Prosecutor' interface. The top navigation bar shows the date 'February 5, 2021'. The left sidebar contains a navigation menu with 'Organizations' highlighted (1). A dropdown menu for 'Defense Counsel' is open (2), showing options: 'Add OrgUnit' (3), 'Add Location' (4), 'Add Person' (5), 'Move to' (6), and 'Merge into' (7). The main form area contains fields for 'Name', 'Short Name', 'Code*', 'Start Date', 'End Date', 'Status', 'Phone 1', 'Phone 2', and 'Phone 3'. There are also sections for 'Other Addresses' and 'Contact' with 'Add Address' and 'Add Contact' buttons respectively. At the bottom are 'Save', 'Back', and 'Delete' buttons.

Directory person and directory organization attachment

The screenshot shows the 'Attachments' tab in a software interface. The interface includes a table with the following columns: Type, Caption, File Name, Stamp, Bulk Stamp, Resizable, Note, Roles, Start Date, End Date, and Labels. Below the table, there is an 'Add Attachment' button and 'Save', 'Back', and 'Delete' buttons.

Attachments are documents and images associated with a person or organization. Generally this is used for things like an agency seal or logo, bail bond license, proof of residency, head shot of a person or stamp for document stamping.

Add an attachment

Click [Add Attachment] to add a row to add the document in the grid.

The screenshot shows the Attachments table with the following values: Type: HeadShot, Caption: (empty), File Name: Choose File No file chosen, Stamp: (checkbox), Bulk Stamp: (checkbox), Resizable: (checkbox), Note: (empty), Roles: Everyone, Start Date: (empty), End Date: (empty), Labels: (empty).

- **Type:** select the attachment type.
- **Caption:** enter a caption for the image.
- **File Name:** click [Choose File] to select a file to attach.
- **Stamp:** select to indicate the attachment is a stamp usable by the agency.
- **Bulk Stamp:** select to indicate the attachment is a stamp usable in scanning utilities.
- **Resizable:** select to indicate the attachment can be resized.
- **Note:** enter note about the file.
- **Roles:** select the roles that have access to this attachment. If you select none, then it defaults to **Everyone**.

The screenshot shows the Attachment Access Roles dialog box. The dialog box is titled 'Attachment Access Roles' and contains a list of roles with checkboxes: Administrator, Defense Attorney, Judge, Law Enforcement Officer, Legal Staff, Probation, Parole, PreTrial, and Prosecuting Attorney. An 'OK' button is at the bottom right.

- **Start Date:** set the first date the attachment is usable.
- **End Date:** set the last date the attachment is usable.
- **Labels:** add labels to organize or group attachments.

Update an attachment

Click **Edit Attachment** link at the end of the row to make the fields editable. Make the required changes, then click [**Save**].

Type	Caption	File Name	Stamp	Bulk Stamp	Resizable	Note	Roles	Start Date	End Date	Labels
HeadShot		Choose File No file chosen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Everyone			

Directory person and directory organization identifications

Type	Number	Issuer Name	Issuer State	From Date	To Date
No Identifications					
Add Identification					

Identifications are numbers associated with a person or organization. This number is assigned by some sort of organization, such as the Social Security Administration, Federal Bureau of Investigation, state drivers license division, and court identification number.

Add an identification

Click [**Add Identification**] to open the Add Identification form:

The screenshot shows a web form titled "Identification". It includes the following fields and controls:

- Type***: A dropdown menu.
- Number***: A text input field with a small help icon to its right.
- Issuer Name**: A text input field.
- Issuer State**: A dropdown menu.
- Effective from**: A date input field with a calendar icon to its right.
- Effective to**: A date input field with a calendar icon to its right.
- Memo**: A large text area for notes.
- Buttons**: "Add" and "Cancel" buttons at the bottom.

- **Type**: select the number type.
- **Number**: enter the number.
- **Issue Name**: enter the name of the issuing organization.
- **Issue State**: select the state of issuance.
- **Effective from**: enter the date identification is effective from, typically the issuance date.
- **Effective to**: enter the date identification is effective to, typically the expiration date.
- **Memo**: enter anything of note about the identification.

Update an identification

Click an identification number to open the identification form, which records information populated in the correct fields. Make the required changes, then click **[Update]**.

Directory person

Directory Persons are individuals that are in your organization or another organization, such as attorneys, probation officers, police officers, and judges.

Search for a directory person

Directory

Person Organization

Search

Name ID Number Code

Group All Firm Name Status Active

Role All Organization Active to

Search Clear Add New Person Import

Criteria:

- **Name:** Enter the name of the person.
- **ID Number:** Enter the ID number of the person.
- **Code:** Enter the code used for the person.
- **Group:** Can be used to filter results.
- **Firm Name:** Enter the name Firm Name to filter results.
- **Status:** current status of the person, choose from:
 - All
 - Active
 - Inactive
- **Role:** Select one or more **Directory Person** roles:
 - All
 - Administrator
 - Defense Attorney
 - Judge
 - Law Enforcement Officer
 - Legal Staff
 - Probation, Parole, PreTrial
 - Prosecuting Attorney
- **Organization:** Enter all or part of an organization name to filter results.
- **Active:** start and end date of activity of the person.

Buttons:

- **[Search]:** do the search with no criteria. The search returns a paginated list.
- **[Clear]:** reset search criteria.
- **Add New Person:** open form to add a new **Directory Person**.

- **Import:** import a Excel spreadsheet of **Directory Persons**.

Add a directory person

To add a new **Directory Person**, click [**Add New Person**].

Directory / Add New Person

Information | Off-Time | Attachments | Attributes | EFSP Attributes

General Information

Group: All

Role*

Secondary Roles

First Name

Middle Name

Last Name

Last Name 2

Code*

Printed Name

Job Title

Firm Name

Prefix

Suffix

Phone 1

Phone 2

Phone 3

Web Address

Email

Alt. Email

Notes

Status: Active

Person Rank

Start Date

End Date

End Reason

Exclude From Config Management

> Identifications

Organization Address

Other Addresses

Save | Save & Assign Security | Cancel

- **Group:** TBW
- **Role:** select one or more **Directory Person** roles:
 - **Administrator**
 - **Defense Attorney**
 - **Judge**
 - **Law Enforcement Officer**
 - **Legal Staff**
 - **Probation, Parole, PreTrial**
 - **Prosecuting Attorney**
- **Secondary Roles:** select one or more secondary **Directory Person** roles:
 - **Administrator**
 - **Defense Attorney**
 - **Judge**

- **Law Enforcement Officer**
- **Legal Staff**
- **Probation, Parole, PreTrial**
- **Prosecuting Attorney**
- **First Name:** The first name of the person.
- **Middle Name:** The middle name of the person.
- **Last Name:** The last name of the person.
- **Last Name 2:** The second last name of the person.
- **Code:** Unique code for the organization. If you do not want to come up with one, use the [Generate] button to generate one for you.

Code*

Generate

- **Printed Name:** The printed or deputized name.
- **Job Title:** Job title of the person.
- **Firm Name:** Name of the firm the person is associated with.
- **Prefix:** Prefix of the person, such as: *Mr., Mrs., Dr., Sir.*
- **Suffix:** Suffix of the person, such as: *Junior, II, III, MD.*
- **Phone 1, Phone 2, and Phone 3:**

Phone 1

1. Choose the phone type:

- **Cell Phone**
- **Fax**
- **Home Phone**
- **Work Phone**

2. Enter the 10 digit phone number.

3. Optionally enter the extension.

- **Web Address:** the website for the person.
- **Email:** main email for the person.
- **Alt. Email:** place for a secondary email for the person.

- **Notes:** notes relating to the person.
- **Status:** defines if the person is active or inactive. One of: **Active**, **Inactive**
- **Person Rank:** Rank of the individual, configured by options in the DIR_PERSON_RANK lookup list [1].
- **Start Date:** Date this person is available in drop downs in the system.
- **End Date:** Date this person is no longer available in drop downs in the system.
- **End Reason:** Reason the person is no longer a directory person. This list is configured by options in the DIR_PERSON_END_REASON lookup list [1].



Role, Code are required.

[1] Lookup lists, such as DIR_PERSON_RANK are only editable by support.

Optional items

Optionally, you can add the following items to a person record:

- **Identifications.**
- **Addresses** [<https://documentation.journaltech.com/eAttorney/admin/directory/person/addresses.html>].
- **Off-Time** [https://documentation.journaltech.com/eAttorney/admin/directory/person/off_time.html].
- **Attachments.**
- **Attributes** [<https://documentation.journaltech.com/eAttorney/admin/directory/attribute.html>].

Bulk import directory persons

Clicking the **[Import]** button provides the format of the requisite Excel file for bulk import. The windows also includes a link to a sample file with the required column headers. Click **[Choose File]** at the top to choose the file to import, then click **[Import]** on the lower right to start the import.

Import Directory Person XLS File

File: No file chosen

File Format: Excel XLS (Click here to download a sample file with column headers.)

The first row of the file must have these column headers:

First Name|Middle Name|Last Name|Last Name 2|Code|Role Group|Role|Prefix|Suffix|Firm Name|Address Type|Address 1|Address 2|Address 3|City|State|Zip|Country|Telephone 1 Type|Telephone 1 Number|Telephone 2 Type| Telephone 2 Number|Email|Identification Type|Identification Number|Identification Effective From|Organization|Language|Status|Start Date|End Date

Required Column Values

First Name	Role (Values must match the DIR_PERSON_ROLE lookup list codes)
Last Name	Status (TRUE for active persons, FALSE for inactive persons)
Code (must be unique)	

The sample import file (download link is above) has bolded column headers for the required columns.

Possible Additionally Required Column Values

Address Type (required only if importing address)	Telephone 2 Type (required only if importing telephone 2)
Telephone 1 Type (required only if importing telephone 1)	Identification Type (required only if importing identification)

Edit a directory person

If you click a person name, you are presented with the update form:

Directory / Chislev Balthasar

Information Profiles Off-Time Attachments Attributes EFSP Attributes

General Information

Group: All	Phone 1: <input type="text"/> <input type="text"/> <input type="text"/>
Role*	Phone 2: <input type="text"/> <input type="text"/> <input type="text"/>
Secondary Roles	Phone 3: <input type="text"/> <input type="text"/> <input type="text"/>
First Name: Chislev	Web Address: <input type="text"/>
Middle Name: <input type="text"/>	Email: <input type="text"/>
Last Name: Balthasar	Alt. Email: <input type="text"/>
Last Name 2: <input type="text"/>	Notes: <input type="text"/>
Code*: AP-32121 <input type="button" value="Generate"/>	Status: <input type="text"/>
Printed Name: <input type="text"/>	Person Rank: <input type="text"/>
Job Title: <input type="text"/>	Start Date: <input type="text"/>
Firm Name: <input type="text"/>	End Date: <input type="text"/>
Prefix: <input type="text"/>	End Reason: <input type="text"/>
Suffix: <input type="text"/>	<input type="checkbox"/> Exclude From Config Management

> Identifications

Organization Address: <input type="text"/>	Other Addresses: <input type="text"/>
<input type="button" value="Add Organization"/>	<input type="button" value="Add Address"/>

Save Save & Assign Security [Login: Jared] Back Delete

- **Group:** TBW
- **Role:** select one or more **Directory Person** roles:
 - **Administrator**
 - **Defense Attorney**

- Judge
- Law Enforcement Officer
- Legal Staff
- Probation, Parole, PreTrial
- Prosecuting Attorney
- **Secondary roles:** select one or more secondary **Directory Person** roles:
 - Administrator
 - Defense Attorney
 - Judge
 - Law Enforcement Officer
 - Legal Staff
 - Probation, Parole, PreTrial
 - Prosecuting Attorney
- **First Name:** The first name of the person.
- **Middle Name:** The middle name of the person.
- **Last Name:** The last name of the person.
- **Last Name 2:** The second last name of the person.
- **Code:** Unique code for the organization. If you do not want to come up with one, click [Generate] to generate one for you.

Code*

Generate

- **Printed Name:** The printed or deputized name.
- **Job Title:** Job title of the person.
- **Firm Name:** Name of the firm the person is associated with.
- **Prefix:** Prefix of the person, such as: Mr., Mrs., Dr., Sir.
- **Suffix:** Suffix of the person, such as: Junior, II, III, MD.
- **Phone 1, Phone 2, and Phone 3:**

Phone 1

1. Choose the phone type:

- **Cell Phone**
 - **Fax**
 - **Home Phone**
 - **Work Phone**
2. Enter the 10 digit phone number.
 3. Optionally enter the extension.
- **Web Address:** the website for the person.
 - **Email:** main email for the person.
 - **Alt. Email:** place for a secondary email for the person.
 - **Notes:** notes relating to the person.
 - **Status:** defines if the person is active or inactive. One of: **Active**, **Inactive**
 - **Person Rank:** Rank of the individual, configured by options in the DIR_PERSON_RANK lookup list [1].
 - **Start Date:** Date this person is available in drop downs in the system.
 - **End Date:** Date this person is no longer available in drop downs in the system.
 - **End Reason:** Reason the person is no longer a directory person. This list is configured by options in the DIR_PERSON_END_REASON lookup list [1].



Role, Code are required.

[1] Lookup lists, such as DIR_PERSON_RANK are only editable by support.

Optional items

Optionally, you can add the following items to a person record:

- [Directory person and directory organization identifications](#)
- <https://documentation.journaltech.com/eAttorney/admin/directory/person/addresses.html>
- https://documentation.journaltech.com/eAttorney/admin/directory/person/off_time.html
- [Directory person and directory organization attachment](#)
- <https://documentation.journaltech.com/eAttorney/admin/directory/attribute.html>

Directory organization and other addresses

At the bottom of the <https://documentation.journaltech.com/eAttorney/admin/directory/>

[person/index.html](#) screen, addresses can be associated with the person record. An Organization Address or Other Address can be added:

The screenshot shows a web form for a person record. At the top, there are fields for 'Firm Name' (containing 'Vulfer County Sherrif'), 'Prefix', and 'Suffix'. To the right, there is an 'End Reason' dropdown menu and a checkbox labeled 'Exclude From Config Management'. Below these fields is a section titled 'Identifications' with two sub-sections: 'Organization Address' and 'Other Addresses'. Each sub-section has an 'Add' button ('Add Organization' and 'Add Address' respectively). At the bottom of the form, there are buttons for 'Save', 'Save & Assign Security', 'Back', and 'Delete'. The user information '02/8/21 by admin' is visible in the bottom right corner. Two red arrows point to the 'Add Organization' and 'Add Address' buttons.

Organization addresses

An Organization Address shows when a Directory Person is added to a [Directory organization](#).

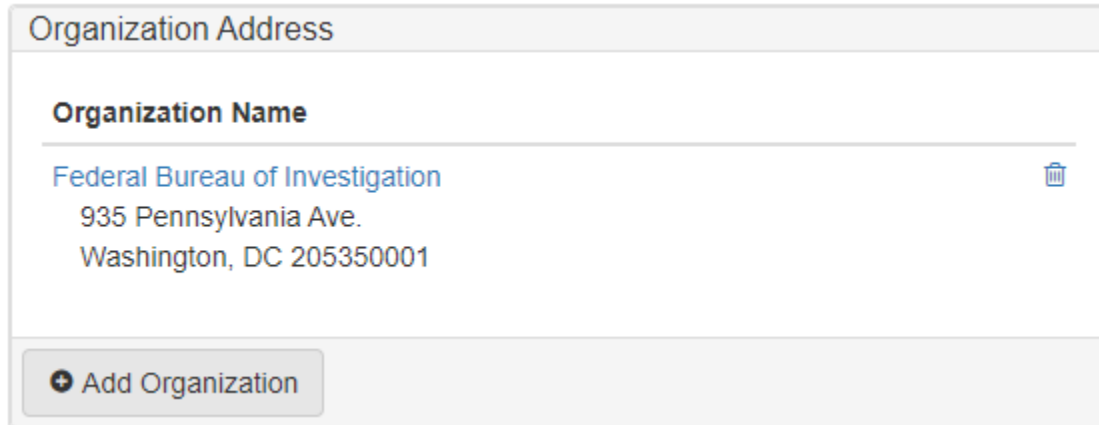
To add a person to an organization, click [Add Organization]. This shows the **Organization Search** pop-up:

The screenshot shows a pop-up window titled 'Organization Search'. It contains several search criteria fields: 'Loc Name' (empty), 'Loc Type' (dropdown with 'All' selected), 'Resource' (dropdown with 'All' selected), 'Org Name' (text input with 'Bureau'), 'Org Type' (dropdown with 'All' selected), and 'Organization' (dropdown). A 'Search' button is located below the fields. Below the search button, the search results are displayed under the heading 'Organization'. Two results are shown: 'Bureau of Land Management Law Enforcement' and 'Federal Bureau of Investigation Law Enforcement'. Three red circles with numbers 1, 2, and 3 are overlaid on the image to indicate the steps: 1 is on the search criteria fields, 2 is on the Search button, and 3 is on the search results.

In the pop-up window, enter the search criteria for the organization you want to add (1), click [Search] (2), then click the organization link in the search results (3).

After clicking the organization in the search pop-up, the organization shows in the

Organization Address panel:



The screenshot shows a panel titled "Organization Address". Inside the panel, there is a section labeled "Organization Name" with a horizontal line below it. Below the line, there is one entry: "Federal Bureau of Investigation" in blue text, followed by "935 Pennsylvania Ave." and "Washington, DC 205350001" in black text. To the right of the blue text is a trash can icon. At the bottom of the panel is a button labeled "+ Add Organization".


After adding the organization, click **[Save]** on the **Directory Person** record to save the changes.

Other addresses

Besides organization addresses, other addresses can also be added to a Directory Person record. These addresses could represent a mailing address, physical address, or work address.

To add a personal address to a **Directory Person**, click **[Add Address]** in the **Other Addresses** panel.

Other Addresses

Select 

Address



City

State

ZIP -

Use as Mailing Address

Country

From  To 

+ Add Address

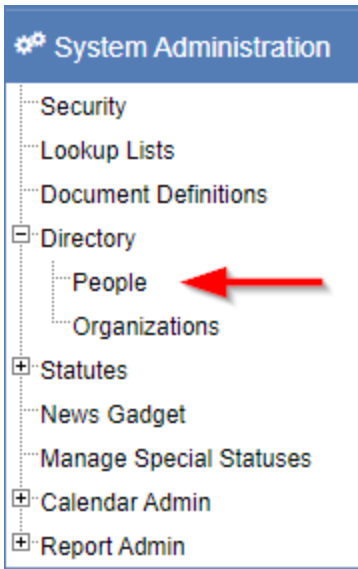
Enter the information for the address, then click **[Save]** on the **Directory Person** record.

Directory off-time

Off-time is a way to track when a Directory Person is off of work. This may include sick leave, schedule vacation, or other reasons.

Navigate to directory person off-time

To view or schedule off-time for a Directory Person, navigate to the Directory Person search in the left-navigation:



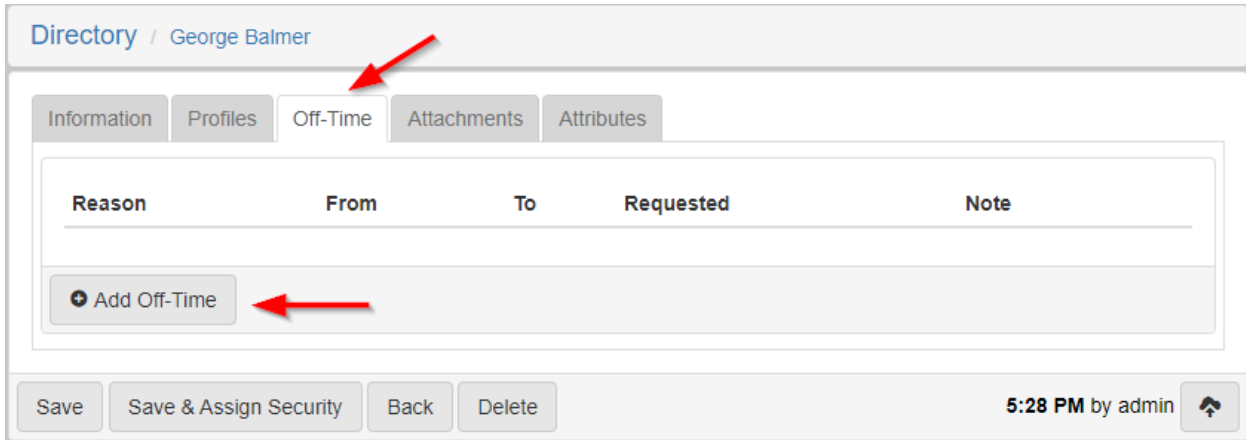
After navigating to the Directory Person search screen, enter the criteria for the individual you are trying to find (1), click the **Search** button (2), and then click the name of the individual:

The screenshot shows the 'Directory' search interface. The 'Person' tab is selected. The search criteria are: Name: George, Group: All, Role: All, ID Number: (empty), Firm Name: (empty), Organization: (empty), Code: (empty), Status: Active, Active: (empty) to (empty). The search results show one entry: Balmer, George, GB1, Law Enforcement Officer, Vulfer County Sherrif. The search button is highlighted with a red circle 2, and the name 'Balmer, George' is highlighted with a red circle 3.

Name	Code	Role	Firm	Organization	Room	Email
Balmer, George	GB1	Law Enforcement Officer	Vulfer County Sherrif			

View and add off-time

After clicking a name, the **Directory Person** screen shows. Click the **Off-Time** tab to view and manage off-time for the person:



Directory / George Balmer

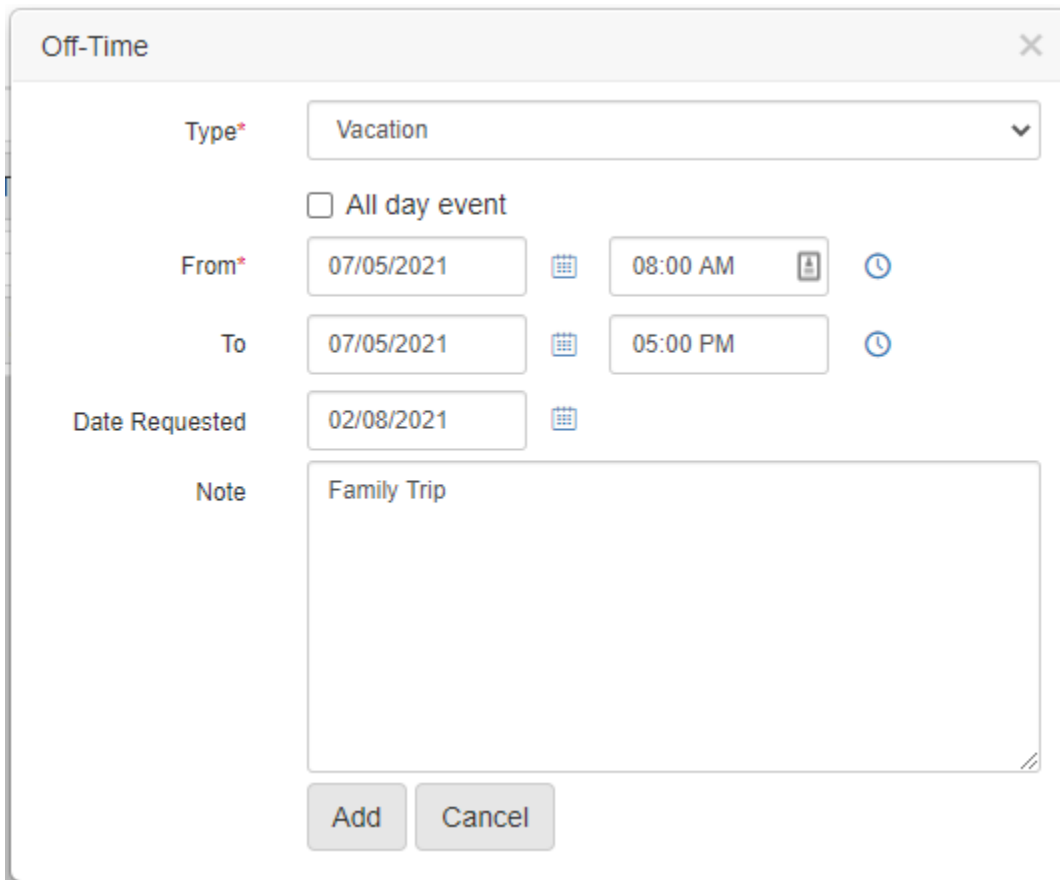
Information Profiles **Off-Time** Attachments Attributes

Reason	From	To	Requested	Note
--------	------	----	-----------	------

+ Add Off-Time

Save Save & Assign Security Back Delete 5:28 PM by admin

To add Off-Time for the person, click **[Add Off-Time]**. The following dialog shows:



Off-Time

Type* Vacation

All day event

From* 07/05/2021 08:00 AM

To 07/05/2021 05:00 PM

Date Requested 02/08/2021

Note Family Trip

Add Cancel

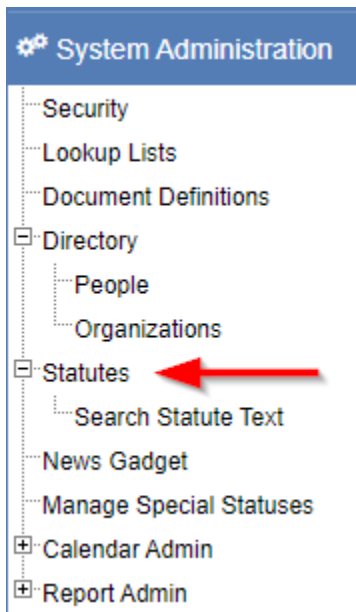
Fill in the information for when the off-time is scheduled and then click **[Add]**. The new entry shows on the Off-Time tab.



Off-Time shows on the calendar for that Directory Person.

Statutes

Navigate to the statute search screen by clicking the **Statutes** link in the **System Administration** menu in the left navigation pane:



Searching for a statute

After navigating to the statutes search screen, you can search for, edit, and add new statutes:

Admin / Statute / Search

Search Criteria

Section No. Jurisdiction Start Date to

1 Source Classification Active Now

Section Name Code Expire Date to

Category Assessment Group Mapping Actions Financial Responsibility

Subcategory Sort By Must Appear

Status Sort Order Priors Eligible

Proof Correctible

School Correctible

2 4

Search New Statute Import Export Search Results Export All Statutes

Results 1-1 of 1

<input type="checkbox"/>	Section No.	Section Name	Code	Category	Classification	Base	Bail	Points	Actions	Assessment Group	Pool	Jurs	Effective From	Effective To	Last Modified
<input type="checkbox"/>	NRS 195.020	AIDING AND ABETTING	F					0							03/14/14 by wpruce

3

Assessment Group Mapping Update Selected

1. Enter the search criteria for a statute you want to search for.
2. Click the search button.
3. Search results are shown in the bottom section. Click the *Section No.* link on one of the search results to edit it.
4. Click the **New Statute** button to [create a new statute](#).

Search results

Statutes include these main parts listed in statute search results, plus other information:

- Section Number.
- Section Name.
- Short Name.
- Code.
- Category.
- Classification.

Adding and editing a statute

Add a new statute by clicking [**New Statute**] in the [Statute Search](#) screen.

Edit an existing statute by clicking the **Statute No.** link in the search results of the [Statute Search](#) screen.

The following options are available when adding or editing a statute:

Add New Statute

<p>Config Code* <input type="text"/></p> <p>Section No.* <input type="text"/></p> <p>Source <input type="text" value="Select an option"/></p> <p>Section Name* <input type="text"/></p> <p>Category <input type="text" value="Select an option"/></p> <p>Subcategory <input type="text" value="Select an option"/></p> <p>Report Category <input type="text" value="Select an option"/></p> <p>Classification <input type="text" value="Select an option"/></p> <p>Code <input type="text"/></p> <p>Short Name <input type="text"/></p> <p>Notes <input type="text"/></p> <p>Description <input type="text"/></p> <p>Statute/Charging Language <input type="text"/></p> <p>Statute of Limitations <input type="text"/></p>	<p>Status* <input type="text" value="ACTIVE - ACTIVE"/></p> <p>Effective From <input type="text"/></p> <p>Effective to <input type="text"/></p> <p>Jurisdiction <input type="text"/></p> <p>Base Offense Level <input type="text"/></p> <p>Points <input type="text"/></p> <p>Moving Violation <input type="checkbox"/></p> <p>Vehicle Info. Req'd. <input type="checkbox"/></p> <p>Actions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Must Appear (MA) <input type="checkbox"/> Priors Eligible (PE) <input type="checkbox"/> School Correctible (SC) <input type="checkbox"/> Proof Correctible (PC) <input type="checkbox"/> Financial Responsibility (FR)
--	---

Among these options, **Config Code**, **Section Number**, and **Status** are required, while **Config Code** must also be unique. Most of these fields are text fields, with the following exceptions:

Lookup lists

Dropdown options for some fields are configured to show values from the following Lookup Lists:

Statute Field	Lookup List Name
Source	STATUTE_SOURCE
Category	STATUTE_CATEGORY
Subcategory	STATUTE_SUBCATEGORY
Report Category	STATUTE_REPORT_CATEGORY
Classification	STATUTE_CLASSIFICATION

Collection fields

Statute Reporting Categories

Jurisdiction	Type*	Category	Value*	From	To	Expire Date
<input type="button" value="Add"/>						

> Keywords

Fines, Bails, and Sentencing Guidelines

Type	From	To	Base Amount	Length	Total
<input type="button" value="Add"/>					

Fines Setup

Collection fields available on a statute consist of the following entity types and are configured in the following panes on the **Add Statute** screen:

- Statute Reporting Categories.
 - Jurisdiction (Lookup List: JURISDICTIONS).
 - Type (Required).
 - Category (Lookup List: STATUTE_CATEGORY).
 - Value (Required).
- Keywords:

Keywords

Name	Label	Type	Help Text	Required	Values
<input type="text"/>	<input type="text"/>	Date	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="button" value="Add Keyword"/>					

- Fines, Bails, and Sentencing Guidelines:

Add New Item

Type

Effective From

Effective to

Effective Date Based On

Concurrent

Label

Notes

Values

Jurisdiction	Charge Type	Term	Unit	Base Amount	Length	Min	Max	Condition
Default	Default	Default	Default	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	



For information on adding statute texts, see https://documentation.journaltech.com/eAttorney/admin/statute_text.html.

Statute text

Statute text can be found in the **System Administration** tab on the left hand side navigation under **Statutes > Search Statute Text**.

Searching for statute text

Statute texts can be found by searching for a section name or number of a statute. When the search is applied, a filtered list of statutes is displayed. To toggle the view of statute texts on a statute, simple click the plus or minus icon (1) next to the section number:

eProsecutor® Online Prosecutor February 3, 2021

Search Statute Text

Section Name or Number: Category:

Classification:

Search Reset Refine Output 25 per page

Results 1 - 25

Section Number	Section Name	Category	Classification	Edit
+ TEST-001	TEST 1 1 1			
+ NRS 501.305	DELAYING OR INTERFERING WITH NDOV EMPLOYEE IN THE PERFORMANCE OF THEIR DUTY	Misdemeanor		
- 1 490.090	OPERATION ON UNDESIGNATED PAVED HIGHWAYS	Misdemeanor		2
Statute Text Type				
3 Plain Text Changing Language				
by operating an off-highway vehicle on a paved highway that is not otherwise designated for use by off-highway vehicles				
+ NRS 200.571(2)(a)	HARASSMENT WITH A PRIOR CONVICTION	Gross Misdemeanor		
+ NRS 202.287	DISCHARGING FIREARM WITHIN OR FROM STRUCTURE OR VEHICLE	Misdemeanor		
+ CFR 393.48	BRAKES TO BE OPERATIVE	Misdemeanor		
+ NRS 202.367	PROHIBITED PERSON IN POSSESSION OF STUN GUN	Felony		
+ NRS 484B.160	Unlawful Riding In/on Vehicle	Misdemeanor		
+ NRS 705.450	OBSTRUCTING OR DELAYING OF TRAIN	Misdemeanor		
+ NRS 503.300	USING PROTECTED SPECIES AS BAIT	Misdemeanor		
+ NRS 202.350(2)(b)	CARRYING CONCEALED WEAPON WITHOUT PERMIT	Felony		
+ NRS 484D.130	FAILURE TO USE TURN SIGNAL			
+ NRS 484D.130	FAILURE TO USE TURN SIGNAL			
+ NRS 200.737	USE OF ELECTRONIC COMMUNICATION DEVICE BY MINOR TO POSSESS, TRANSMIT OR DISTRIBUTE SEXUAL IMAGES OF MINOR	Misdemeanor		
+ NRS 484D.440	RESTRICTIONS ON TINTING OF WINDSHIELD OR SIDE OR REAR WINDOWS	Misdemeanor		
+ NRS 200.471	ASSAULT	Misdemeanor		
+ NRS 503.570	MINIMUM VISITATION OF TRAPS	Misdemeanor		

Add or change statute text

Statute text can be changed directly by clicking the **Statute Text Type** label next to an expanded statute (3). Statute text can also be edited or changed by clicking the edit button next to the statute (2).

Click the edit button shows the update statute text screen. On the update statute text screen, texts can be added or removed by clicking the +/- signs next to the text. Or statutes texts can be added by clicking the **[Statute Text]** at the bottom of each statute text.

eProsecutor® Online Prosecutor February 4, 2021

Update Statute Text

Section Number: NRS 490.090
Section Name: OPERATION ON UNDESIGNATED PAVED HIGHWAYS

Statute Text (1)

Statute Text Type*

Statute Text*

Effective From

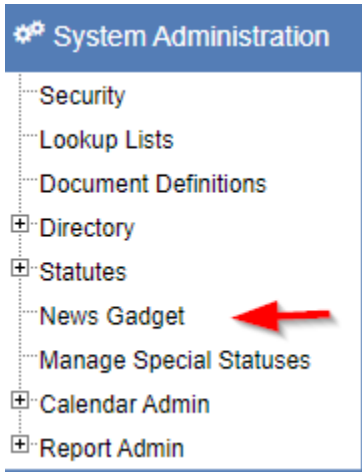
Effective To

News gadget configuration

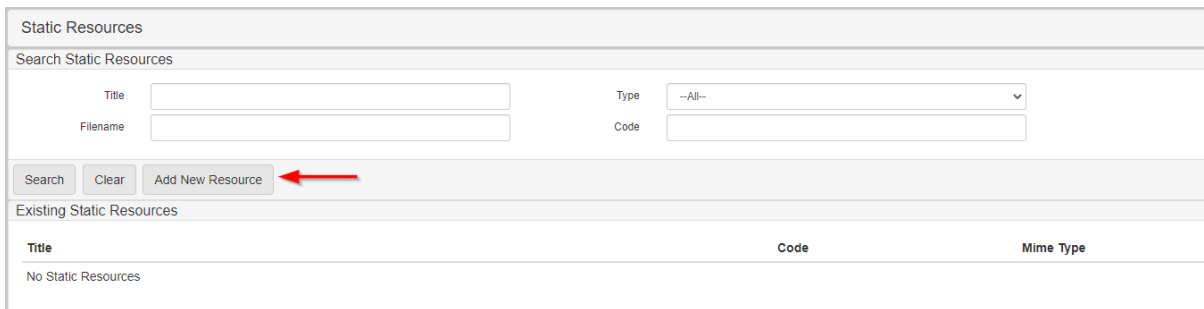
The **News Gadget** shows a message from administrators on users dashboards. To learn how users can add the gadget to their dashboards, see [News gadget](#).

How to change the news gadget content

1. Go to **Left navigation pane > System Administration > News Gadget**.



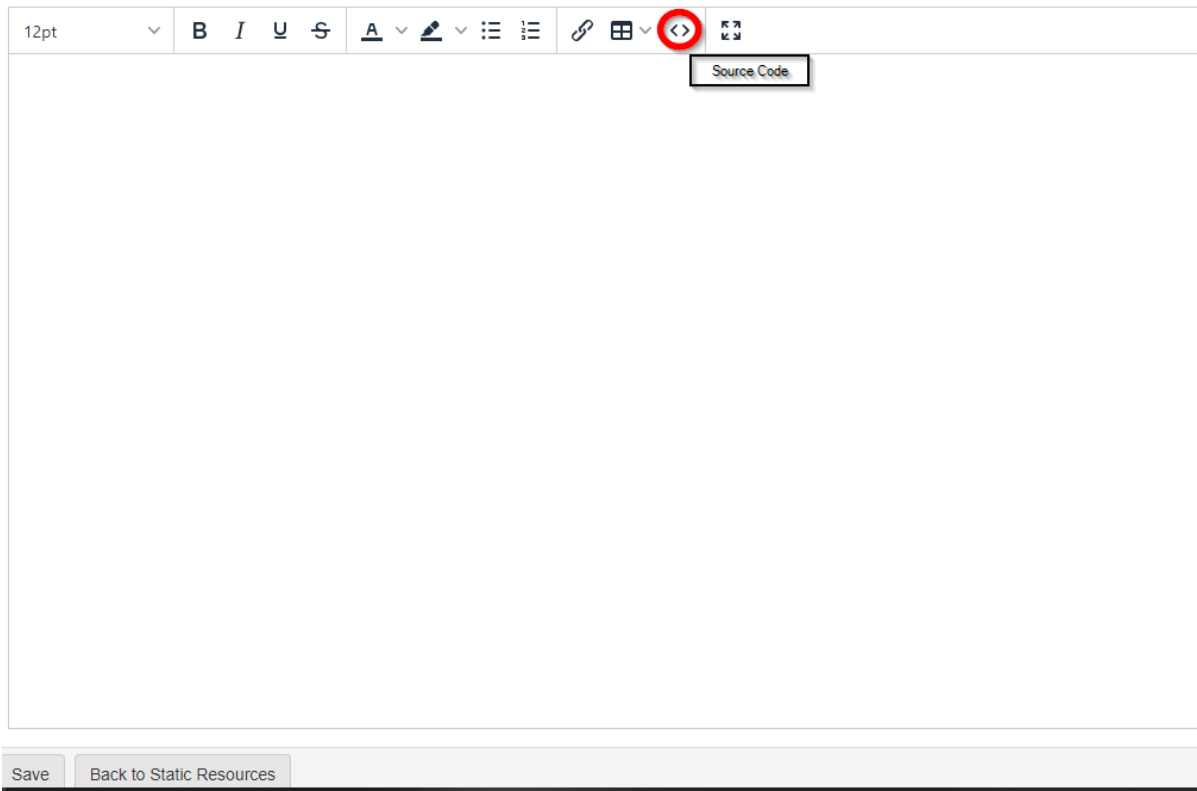
2. This opens the "Search Static Resources" form. Click the "Add New Resource" button.

A screenshot of the 'Search Static Resources' form. The form has a header 'Static Resources' and a sub-header 'Search Static Resources'. Below the sub-header are four input fields: 'Title', 'Filename', 'Type' (a dropdown menu with '--All--' selected), and 'Code'. Below the input fields are three buttons: 'Search', 'Clear', and 'Add New Resource'. A red arrow points to the 'Add New Resource' button. Below the buttons is a section titled 'Existing Static Resources' with a table header: 'Title', 'Code', and 'Mime Type'. The table contains one row with the text 'No Static Resources'.

3. Give the resource a title, and enter **SYMSG** as the code. Leave the type as **HTML**.

A screenshot of the resource configuration form. It has three sections: 'Title' with a text input field containing 'Welcome to the News Gadget'; 'Code*' with a text input field containing 'SYMSG'; and 'Type' with a dropdown menu showing 'Html'.

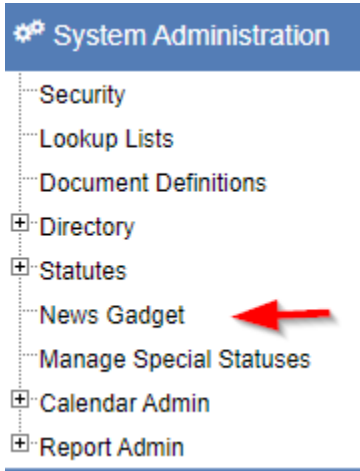
4. In the text box, enter the message you want to display on users dashboard news gadget. This is a WYSIWYG (What You See Is What You Get) editor, with a tool bar that allows for formatting items, inserting tables or links. You can also click [**Source Code**], circled in red, to edit the HTML directly. This needs to be done if adding an image. See [Add images to news gadget](#).



5. Click [**Save**] at the bottom to save the changes.

Add images as a static resource

1. Go to **Left navigation pane** > **System Administration** > **News Gadget**.



2. This opens the **Search Static Resources** form. Click [Add New Resource].

A screenshot of the 'Search Static Resources' form. The form has a header 'Static Resources' and a sub-header 'Search Static Resources'. It contains input fields for 'Title', 'Filename', 'Type' (a dropdown menu set to '--All--'), and 'Code'. Below the input fields are three buttons: 'Search', 'Clear', and 'Add New Resource'. A red arrow points to the 'Add New Resource' button. Below the buttons is a section titled 'Existing Static Resources' with a table header: 'Title', 'Code', and 'Mime Type'. The table content shows 'No Static Resources'.

3. Fill in the upper part of the form:

- Title: Give your image a title.
- Code: Type a unique code for your image in ALL CAPS and with no spaces.
- Type: Change to be **File**.

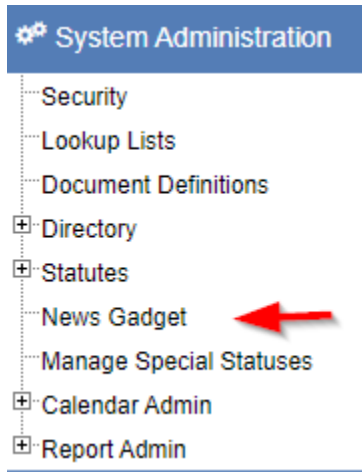
A screenshot of the form fields filled out. The 'Title' field contains 'News Gadget Image'. The 'Code*' field contains 'NEWSGADGETIMAGEONE'. The 'Type' dropdown menu is set to 'File'. Below the dropdown is a file selection area with a 'File' label, a 'Choose File' button, and the text 'No file chosen'.

4. Click [Choose File] to select the image to select the image.

5. Click [**Save**] at the bottom to save the changes.
6. Click [**Back to Static Resources**]. The image is now added as a static resource.


Add images to news gadget

1. Go to **Left navigation pane > System Administration > News Gadget**.



2. This opens the "Search Static Resources" form. Hover over or click the open link icon on the right of the image name to open the image.

Button to click:

Existing Static Resources			Open Link Icon
Title	Code	Mime Type	
News Gadget Image	NEWSGADGETIMAGEONE	image/png	NewsGadgetImageConfiguration1.png 

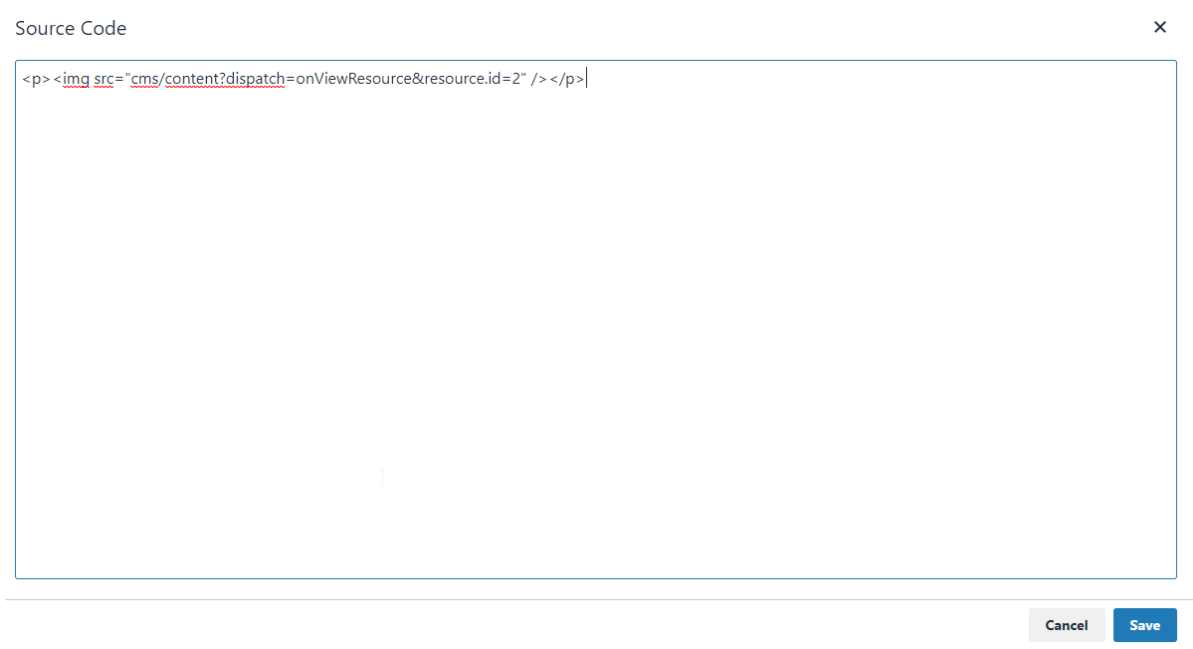
Hover over button, showing URL at the bottom:



3. Note the id of the resource. In this example URL `cms/content?dispatch=onViewResource&resource.id=2`, the id is 2.
4. If a News Gadget needs to be created, add one. See [How to change the news gadget content](#). Otherwise, ensure you are on the "Search Static Resources" form, and click a News Gadget.
5. In the text editor, click [**Source Code**] in the tool bar.
6. Add the following line where you want the image to show:

```
<p></p>
```

7. Replacing the id (value 2 in the example) with the id noted in step 3.
8. Repeat this process for each image you want to add. You can also add other HTML tags to add formatting, such as style, width, height.
9. Click [**Save**] to save changes and close the source code editor.
10. Click [**Save**] to save the gadget.



Document definitions

A **Document Definition** is a file type. When you add a file/document to a case or person record, you select the document definition for the file. The document definition has metadata information about the file that can be used throughout the system.

You can get to the **Document Definitions** settings page by navigating to **Left navigation pane > System Administration > Document Definitions**. There, you can search for or add a **Document Definition**.

Search document definitions

The Document Definitions search screen:

Admin / Document Definitions

Search Criteria

Number / Name Form Type Status

Case Type Form Group Effective Date

Case Category Has Template Expires Date

Event Type Has Fee

Search Reset 30 per page New Definition

Results 1 - 26 Starts with any

Number Name Type Groups Case Types Case Categories Event Types Status Start Expires Template Fee Last Modified

From this screen, you can define criteria in the **Search Criteria** panel to find Document Definitions you would like to look at or change.

You can also create a new Document Definition by clicking the **New Definition** button at the bottom of the **Search Criteria** panel.

If you click an existing Document Definition or create a new one, the Document Definition details screen shows, where you can edit the settings and metadata.

Admin / Document Definitions / Edit SUBP

SUBP - Subpeona - Subpeona

Number* Description

Short Name*

Name*

Status

Efm Subcase Required

Start End After

Related Forms

Doc Number 2

Doc Number 3

Doc Number 4

> Attributes

> Keywords

> EFile Metadata

> Workflow Attributes

> Template Information

> Efm Stamps (0)

> Trusts

> Filing Fees

> Service Fees

> Notes

Save Save & Back Save As Cancel Last Modified [11/17/04]

You can find information about the various settings in the following sections.

Document definition information

Field
Description
Number
A unique number that identifies the Document Definition
Short Name
A unique name that describes the Document Definition.
Name
A more descriptive name than Short Name.
Start
The date after which this record starts showing as a File Type option. If no date is entered, then it defaults to being shown.
End After
The date after which this record stops showing as a File Type option. If no date is entered, then the record does not expire and continues to show indefinitely.

Most other fields on the Document Definition are metadata fields that can be referenced in searches, reports, or business rules.

Attributes

The only attribute you need to worry about setting is the **Form Type** attribute. Here are the Form Types you can choose from:

Form Type
Description
JDA 4

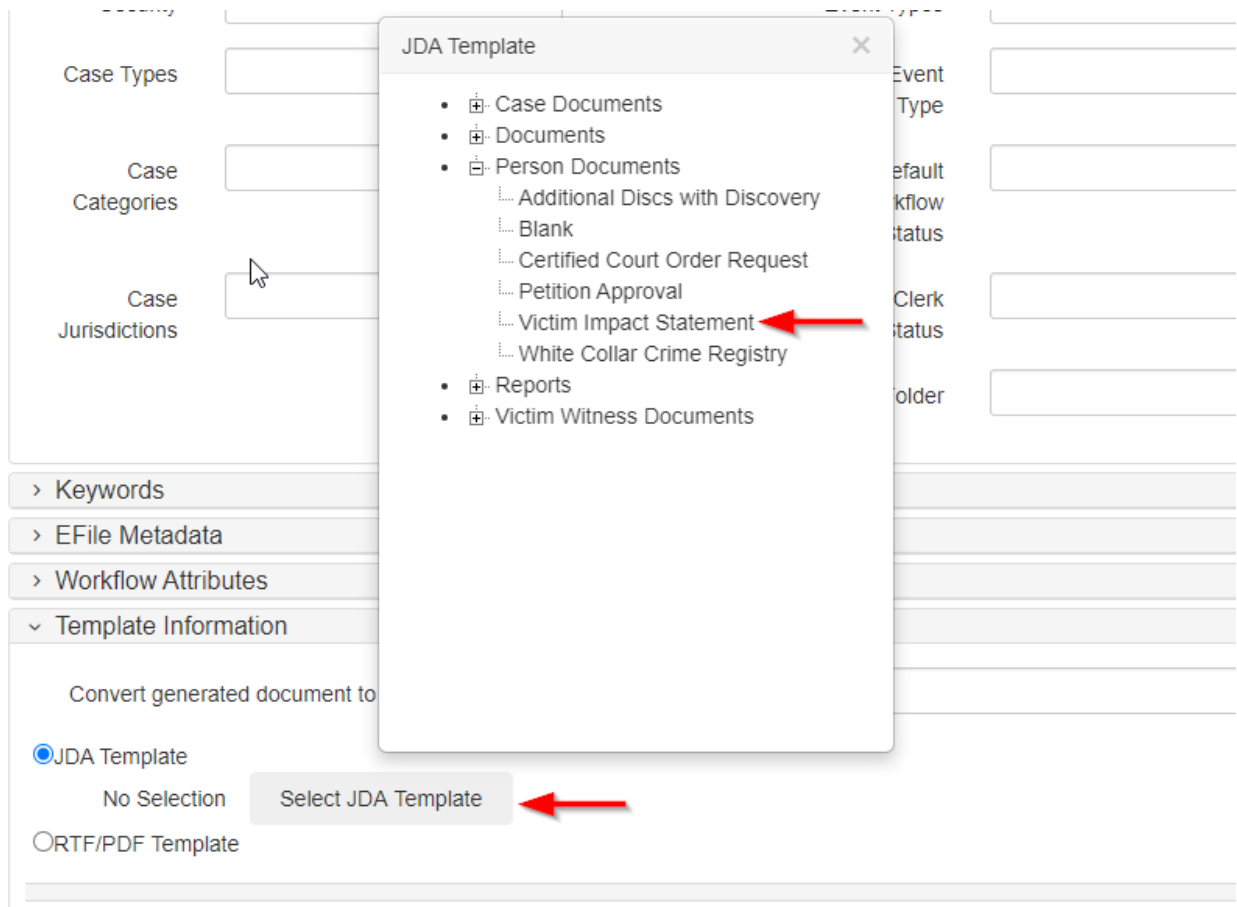
Set the Form Type to JDA 4 when the Document Definition has a JDA template attached to it.
Mugshot
Use this Form Type for Document Definitions that represent a mugshot.
Scan/Upload
Set the Form Type to Scan/Upload to have a Document Definition show on the File Type field on the Add File forms for a case or person.

Template information

The Template Information section is used to set the JDA template for the Document Definition. This allows you generate documents from a case or person record.

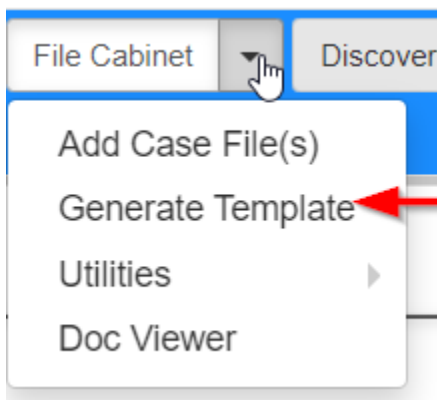
To add a JDA template to a Document Definition, expand the **Template Information** section, then click the **JDA Template** radio button. Finally, click the **Select JDA Template** and choose your template.

See the following for an example:



Click **[Save]** button at the bottom of the screen after selecting your template.

Now you can generate a document using the template you picked for that **Document Definition** by navigating to a Case and selecting **Generate Template** from the **File Cabinet** dropdown.

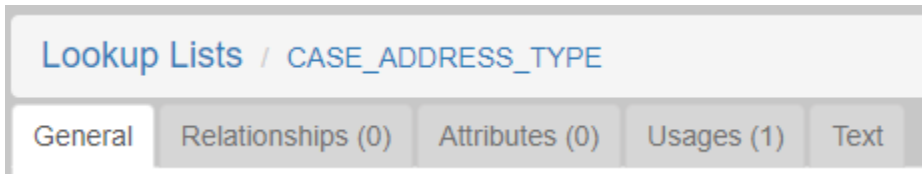


If you add a JDA template to a Document Definition, it is recommended that you change the [Form Type](#) to **JDA 4**.

Lookup lists

A lookup list is a categorized list of values for a given thing. Examples of lookup lists are statuses, item types, or a group of values. They give a limited set of options to choose from in a dropdown box, when configured.

Tabs on configuration screen



General

The main data of the lookup list items are configured here.

Code	Label	Description	Active From	Active To	Attributes	Sys
CS01	Assignment Comple				2	N 07/29/14
CS02	To be Charged				2	N 07/29/14

The parts of an item consist of:

Item
Required
Description
Code
Yes
This is a unique value used like an ID by the system for the item. Typically in all caps with no spaces. For configuration purposes, it may be useful to distill the label into a shortened code. Example: "STS" for an item whose label is Send to Support .
Label
Yes
A human readable value for what the item represents.
Description

No
A place to explain what this item means or what it should be used for.
Active From
No
You can use this to set a future date at which this item becomes active.
Active To
No
You can use this to set a future date at which this item becomes inactive.
Attributes
No
Hovering over this value shows what attribute values are associated with this item. Click this item to edit the Attributes associated with this item.
Sys
No
Indicates whether or not this item is configured by the system.
Last Edited Date
No
Shows the person and change date of the last edit to the row.

Relationships

This tab allows you to select an item from the list to create a relationship with a group of items from another list.

Attributes

This tab allows you to select an attribute to associate with items in your list. The attributes are defined by the lookup list LOOKUP_ATTRIBUTE_TYPE.

Usages

Reports a list of locations this lookup list is used.

Text

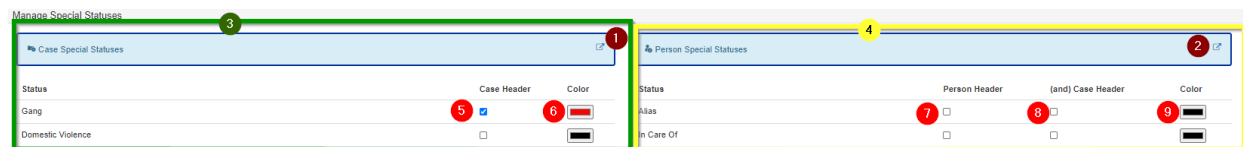
This tab shows all items line separated in a plain readable list as `<code>`,`<description>`.



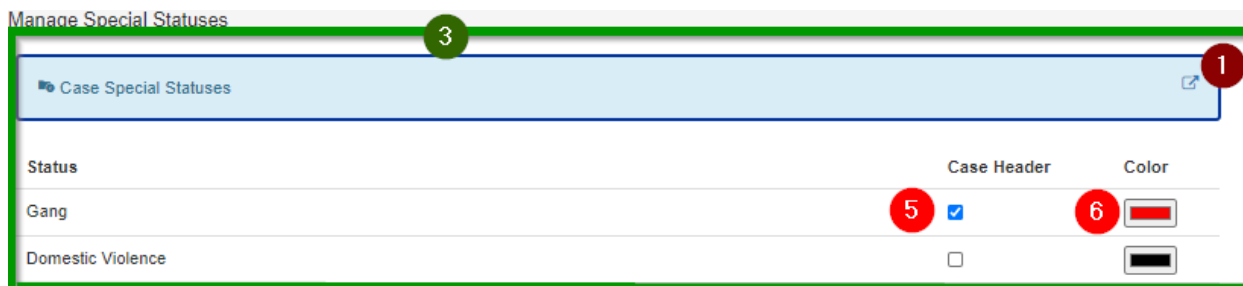
Managing special statuses

Manage Special Statuses is used to configure whether a case or person special status is displayed before the person or case header. In addition, the background color for the case or person special status can also be configured from this screen. There are also links to the corresponding [lookup lists](#) at the top.

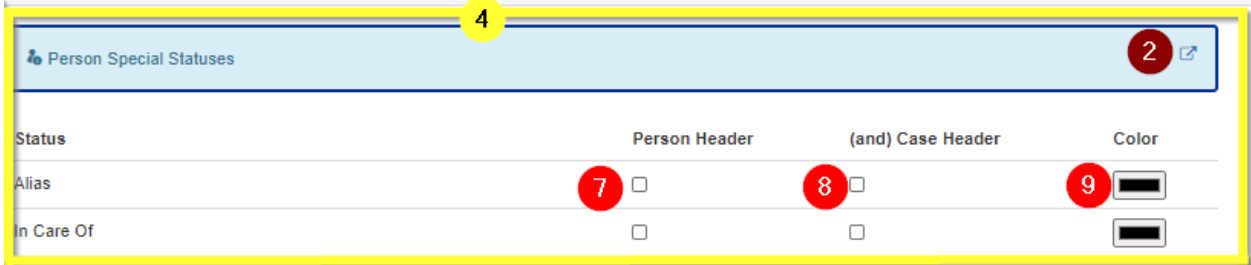
Full screen:



Case Special Status section:



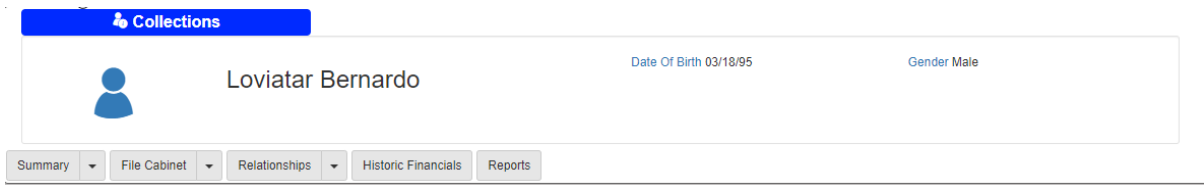
Person Special Status Section:



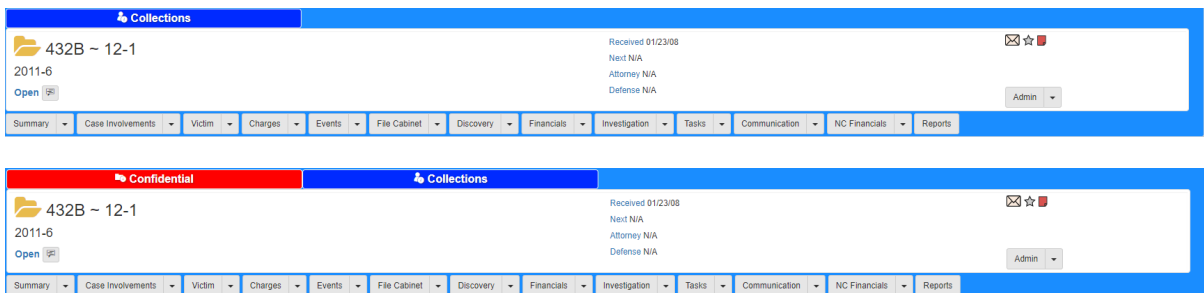
1. Link to open the CASE_SPECIAL_STATUS_TYPE lookup list in a new tab.
2. Link to open the PERSON_SPECIAL_STATUS list in a new tab.
3. Case Special Status configuration.
4. Person Special Status configuration.
5. When checked, the attribute is shown before the case header:



6. Background color of the status on the case page.
7. When checked, person special status is shown before the **person** header.



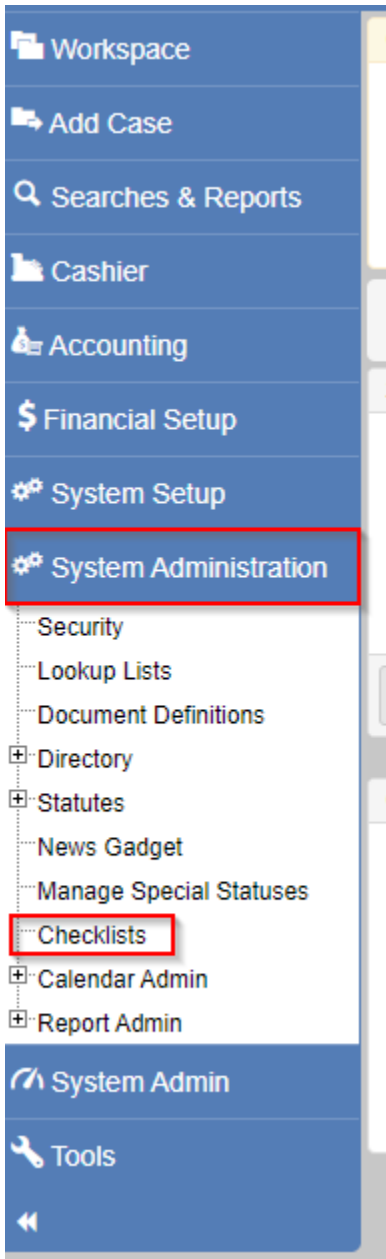
8. When checked, person special status is shown before the **case** header, if anyone involved on the case has that status:



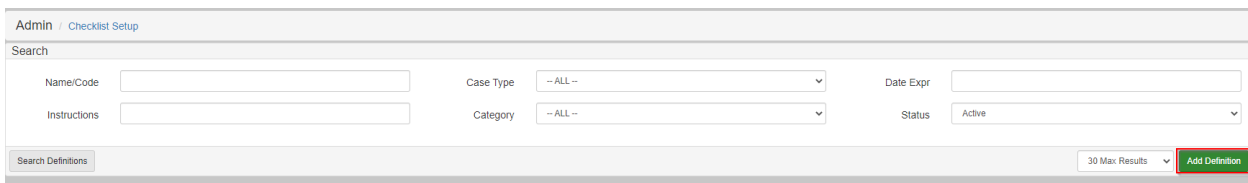
9. Background color of the status on the person and case header.

Checklists

Checklists are managed in the left navigation under **System Administration > Checklists**:



To add a new checklist definition, click **[Add Definition]** in the bottom right corner:



The "Code" and "Name" fields are required. Click [**Save**] to create the definition and move on to adding items to the checklist.

On each item only the "Instructions" field is required, but you may add a description and Due Date rules if desired. When you are finished, click [**Save**].



For information on adding checklists to cases, see <https://documentation.journaltech.com/eAttorney/user/cases/tasks.html>.

Calendar administration

Holiday calendar

The holiday calendar is used to setup recurring holidays that your agency observes. These holidays show on calendars in eAttorney, and aid you in scheduling.

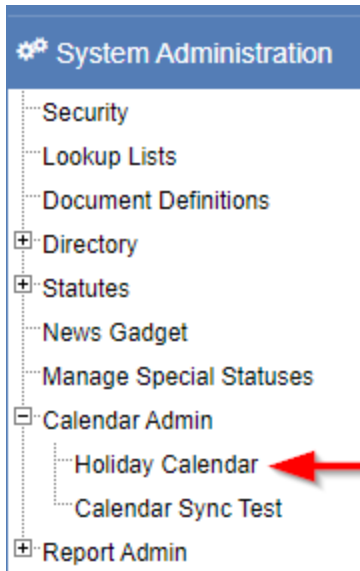
Welcome, Wendi Steinbeck | Dashboard + ⚙️

Calendar Steinbeck, Wendi (Legal Staff) ⚙️

Monday	Tuesday	Wednesday	Thursday	Friday
Nov 23	Nov 24	Nov 25	Nov 26 Thanksgiving	Nov 27 Thanksgiving Friday
Nov 30	Dec 1	Dec 2	Dec 3	Dec 4
Dec 7	Dec 8	Dec 9	Dec 10	Dec 11
Dec 14	Dec 15	Dec 16	Dec 17	Dec 18
Dec 21	Dec 22	Dec 23	Dec 24	Dec 25 Christmas

◀ ▶ Today

You can get to the Holiday Calendar by going to **Left navigation pane** › **System Administration** › **Calendar Admin** › **Holiday Calendar**.



After clicking the **Holiday Calendar** link, Holidays Administration page shows:

Admin / [Holidays Administration](#)

List of Holidays

Name	Type	Year	Detail	
Christmas	DATE	Every	December 25, every year	
Thanksgiving	CYCLE_LAST	Every	The last Thursday of November, every year	
Thanksgiving Friday	CYCLE_LAST	Every	The last Friday of November, every year	
New Year's Day	DATE	Every	January 1, every year	
Independence Day	DATE	Every	July 4, every year	
Labor Day	CYCLE	Every	1st Monday of September, every year	

[Add New Holiday](#) [Holiday Schedule](#) [Import XLS](#)

This screen lists all holidays currently configured in the system. If you would like to add more holidays, there are two ways: manually or using import.

Manual addition and editing

To add a new holiday, click **[Add New Holiday]** at the bottom of the screen. To edit an existing holiday, click the holiday name:

Admin / Holidays Administration / Edit Thanksgiving

Edit Thanksgiving

1 Config Code* Thanksgiving

2 Name* Thanksgiving

3 Date* 11/26/2020 Cycle Last Every Year

Details The last Thursday of November, every year

Next Date 11/26/20

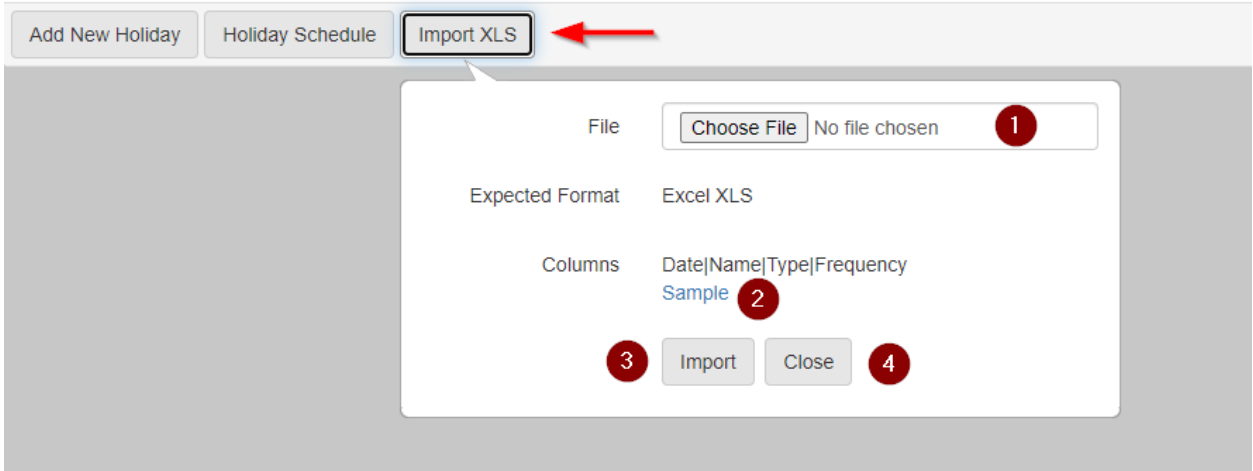
6 Save & Back 7 Save 8 Cancel

1. **Config Code:** Set the system code that identifies the holiday.
2. **Name:** Set the holiday name that shows on the calendars.
3. **Date:** Set the date the holiday occurs this year.
4. **Type:** Select one of three options:
 - **Date:** The holiday occurs on the day entered in the date field. For example, Christmas is on December 25 every year.
 - **Cycle:** The holiday occurs every year on the same weekday from the start of the month. For example, Labor day is the first Monday of September.
 - **Cycle Last:** The holiday occurs every year on the last occurrence of a weekday in a month. For example, Thanksgiving is the last Thursday of November.
5. **Recurrence:** Set it to **This Year** for the holiday to only occur once. Set it to **Every Year** for the holiday to show every year.
6. **[Save & Back]:** Click to save the current settings and return to the **Holidays Administration** page.
7. **[Save]:** Click to save the current settings, but stay on the **Holiday Settings** page.
8. **[Cancel]:** Click to discard the changes and return to the **Holidays Administration** page.

Import holidays

On the **Holidays Administration** page, you can import holidays from an Excel XLS file by clicking **[Import XLS]** at the bottom of the page.

Thanksgiving Friday	CYCLE_LAST	Every	The las
New Year's Day	DATE	Every	Januar
Independence Day	DATE	Every	July 4,
Labor Day	CYCLE	Every	1st Moi



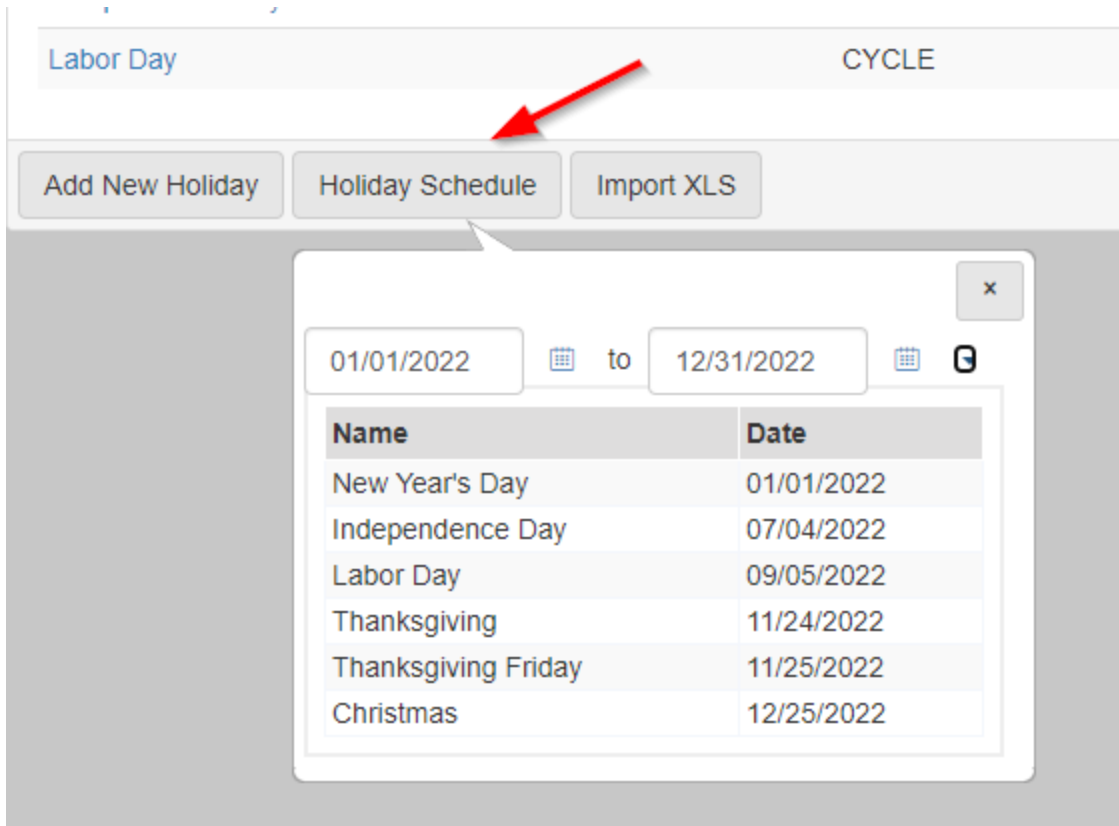
1. **File:** Select an Excel XLS file in the proper format that has holiday data you want to import into eAttorney.
2. **Sample:** Download a sample Excel XLS file that has the expected format and a few samples. See the following screenshot.
3. **[Import]:** Click to import the holidays from the file into eAttorney.
4. **[Close]:** Click to close the **Import** dialog.

	A	B	C	D	E
1	Date	Name	Type	Frequency	
2	12/25/2014	Christmas	DATE	THIS_YEAR	
3	11/27/2014	ThanksGiving	CYCLE_LAST	EVERY_YEAR	
4	9/14/2014	Labor Day	CYCLE	EVERY_YEAR	
5					
6					
7					

After clicking the **Import** button, the new holidays show up in the list.

Holiday schedule

You can view what upcoming holidays there are by clicking the **Holiday Schedule** button at the bottom of the Holidays Administration page.



You can enter a date range and see what holidays exist based on your configured holidays.

Calendar sync test

The Calendar Sync Test page is used for testing how events sync to a person calendar. Google mail and Microsoft Exchange servers are supported.

Calendar Sync Test

Type: Exchange

Server: outlook.office365.com

Username: [redacted]@journaltech.com

Password: [redacted]

Event ID: 24277

Test

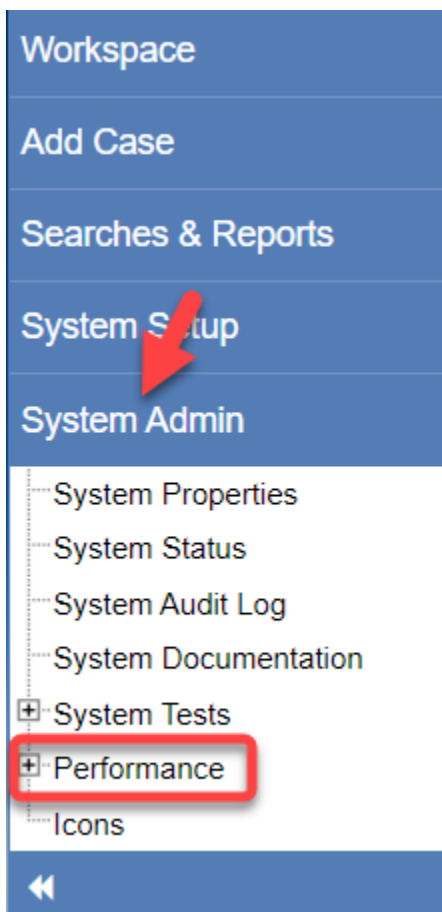
To test how and event syncs to a calendar, you need to fill in the fields with the appropriate data.

- **Type** - Choose Exchange or Google depending on which type of calendar you want to sync to.
- **Server** - Enter the server URL for the Google or Exchange server.
- **Username** - This is the email address for the calendar you want to sync to.
- **Password** - Enter the password associated with the username.
- **Event ID** - Enter an event id from eAttorney that you want to try syncing to the calendar.

Performance logs

- The Performance Screen gives basic information about eAttorney.
- It stores about 30 days of data.
- It tracks CPU usage, memory usage, and database connection usage.

To navigate to your performance screen, select System Admin then click Performance.



The Performance Screen shows:



1. You can change the time frame of your system usage at the top.
2. The System CPU should be 20-30%.
3. The Max memory usage should be around 70%. Fluctuation is normal and acceptable.
4. The Database connection usage should be around 0%.
5. The copy report link copies the report for another person. They do not have to be logged into eAttorney to be able to see the performance screen.
6. You can run several reports:
 - a. **Metric Count Report:**
 - The threshold in the metric count report is measured in milliseconds.
 - This report can detect system operations that caused high memory usage and/or system slow downs.
 - If only the start date is given the whole date is queried.
 - This report measures the duration of how long screens take to load and how many times they have loaded.
 - b. **Metric Duration Report:**
 - This report can detect system operations that caused high CPU usage or blocked database queries.

- If only the start date is given the whole date is queried.
- This reports shows how long screens take to load.
- In this report, you enter dates and times.
- If the threshold in seconds is 30 seconds or longer it needs to be analyzed.

c. Metric without End Report:

- This report can detect system operations that caused high memory usage and/or system slow downs.
- Note: if only the start date is given the whole date is queried.
- Also, take into account system restart when determining if the restart cancelled the operation.
- This report tells you if there are running operations that should have ended.

7. You can also search system TxS.

Help notes

- You can add a Help note to a field in an edit form.
- As an administrator, this allows you to show contextual help to the users.
- You can show a Help note by a field you want to convey useful information.
- An example of a Help note purpose is to pass along information on how to do a task.

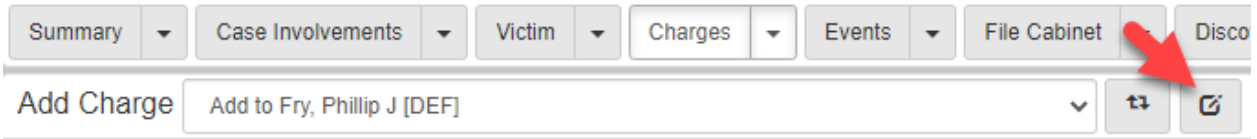
Access a help note

To access a help note, click the help note icon. The following is an example help note.

The screenshot shows a software interface with a navigation bar at the top containing tabs for Summary, Case Involvements, Victim, Charges, Events, File Cabinet, Discovery, Financials, Requests, and Tasks. Below the navigation bar is a form titled 'Add Charge' for 'Add to Fry, Phillip J [DEF]'. The form has several fields: 'Count Number*' (empty), '# of Counts' (value 1), 'Offense Date*' (empty), 'Statute*' (empty), 'Keywords' (value 'No Keywords'), 'Stage Added*' (value 'Referred by Law Enforcement'), and 'Inchoate Type' (empty). A red arrow points to a small help note icon (a circle with an 'i') located to the right of the '1' in the '# of Counts' field. A red-bordered box highlights a help note popup that appears, containing the text 'Counts' and 'If # of Counts is greater than 1, the system will generate the number entered.' An 'Edit' button is visible in the top right corner of the help note popup.

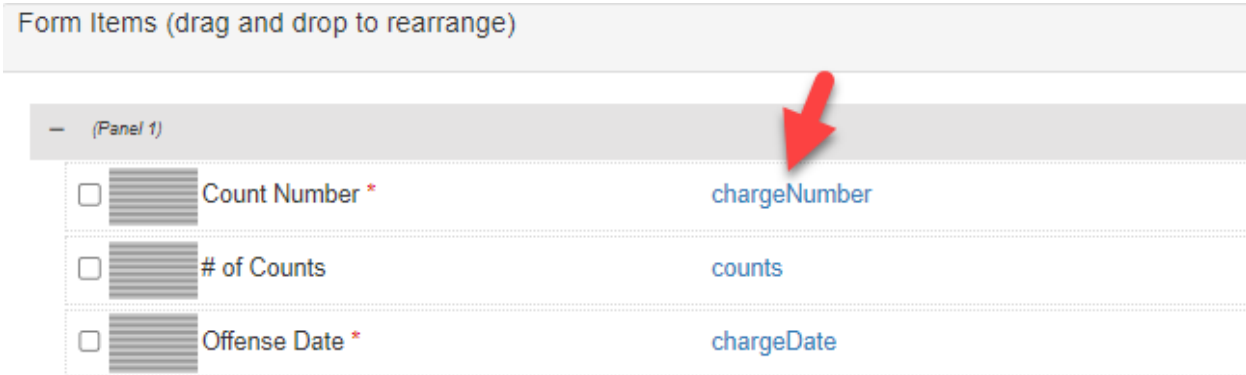
Add a help note

To add a help note to a field, navigate to an edit form.



A horizontal navigation bar with several buttons: Summary, Case Involvements, Victim, Charges, Events, File Cabinet, and Disco. A red arrow points to the 'File Cabinet' button. Below the navigation bar is a search bar containing 'Add Charge' and 'Add to Fry, Phillip J [DEF]' with a dropdown arrow, a refresh icon, and an edit icon.

Once in the edit form, click the field in which you want to add the help note.



A section titled 'Form Items (drag and drop to rearrange)'. Below the title is a list of form items under a '(Panel 1)' header. Each item has a checkbox, a label, and a corresponding field name. A red arrow points to the 'Charge Number' field.

Field Name	Label
chargeNumber	Count Number *
counts	# of Counts
chargeDate	Offense Date *

Once in the **Edit Form Item**, type in the help note box your entity, then a period, then your path.

Click [**Update & Back**] or [**Update**].

Add Forms / Add Charge / Count Number / FormID: 60 / Entity:Charge / Execution Plan

Edit Form Item

Read-only	<input type="checkbox"/>	Path	chargeNumber
Required	<input checked="" type="checkbox"/>	Custom Label	Print Number
UI	<input type="text"/>	Label is Template	<input type="checkbox"/>
Multi-select lookup	<input type="checkbox"/>	No Label	<input type="checkbox"/>
Sort By	<input type="text"/>	Form override	<input type="text"/>
Show link	<input type="checkbox"/>	Form override default values	<input type="text"/>
Carry over	<input type="checkbox"/>	Panel Auto Complete	<input type="text"/>
Carry over when repeated	<input type="checkbox"/>	Panel Auto Complete Min Chars	1
Hidden	<input type="checkbox"/>	Use all form data when searching	<input type="checkbox"/>
Preview Summary	<input checked="" type="checkbox"/>	Min no. of characters	<input type="text"/>
Filter by default	<input type="text"/>	Max no. of characters	<input type="text"/>
Use Inner Join	<input type="checkbox"/>	Default	<input type="text"/>
		Refresh Default	<input type="text"/>
			OR
		Force Default	<input type="checkbox"/>
		Submit Value	<input type="text"/>
		Truncate	<input type="text"/> :
		Style Class	<input type="text"/>
		Style	<input type="text"/>
		Help Note	charge.chargenumber
		Tool Tip	here is just the tip

Once on your form, you can click the help note icon, then click **[Edit]**.

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financial

Add Charge Add to Fry, Phillip J [DEF]

Count Number*

of Counts

Offense Date*

Statute*

Keywords No Keywords


Stage Added* Referred by Law Enforcement

Charge Number **Edit**

This is a charge number tool tip test.

In the **Edit Help Topic** screen, you can type the contents of your help note. Click **[Save]**.

Edit Help Topic

Key	<input type="text" value="charge.chargeNumber"/>
Parent	<input type="text" value="- Select -"/>
Rank	<input type="text" value="- Select -"/>
Title	<input type="text" value="Charge Number"/>
Tags	<input type="text"/>
Contents 	<input type="text" value="This is a charge number help note."/>

System documentation

Documentation

1. To view the system documentation, type in the following addition to your already existing URL: </ecms/admin/documentation>:

<https://example.journaltech.com/ecms/admin/documentation>

2. A screen shows that includes your system documentation:

Modules

Forms	Type	# of forms
	Headers	5
	Folder Views	29
	Case Initiations	5
	Insert Screens	39
	Update Screens	48
	Searches	23

Export as DOC/XLS

Security Groups

Export as XLS

Security Task Definitions

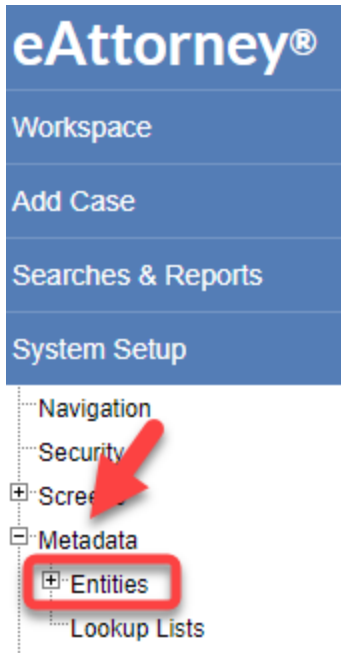
Export as XLS

Workflow	Package Name	# of processes	# of activities
	Case	1	5
	Case Assignment	1	3
	Case Research Record	2	9
	Charge	1	3
	Check List Item	1	4
	Party	1	3
	Person	1	3
	Portal / Discovery	7	25
	Searches	0	0
	VOCA Reporting	1	3

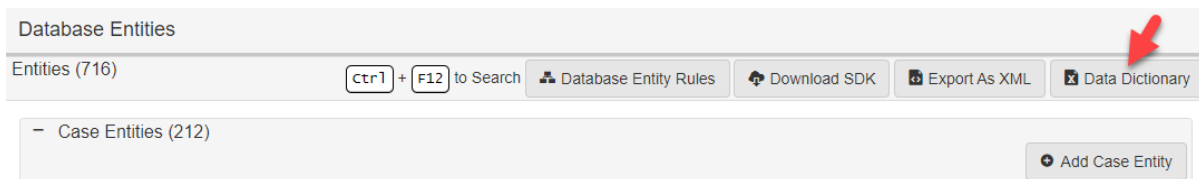
Export as DOC/XLS

Data dictionary

1. To view the data dictionary, navigate to System Setup, click [**Metadata**], and then select **Entities**.



2. Click [Data Dictionary] to download your data dictionary.

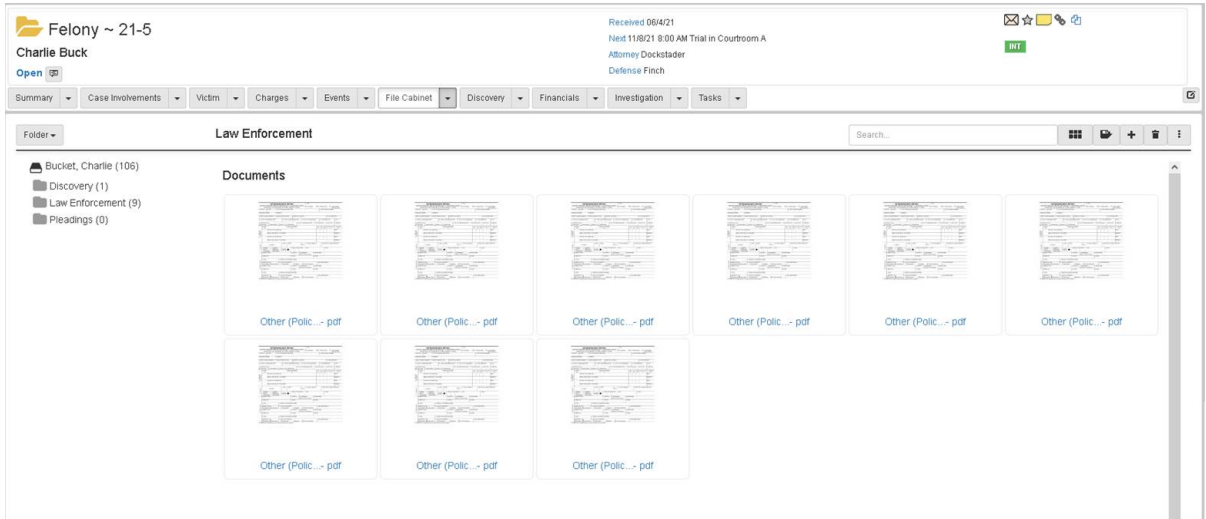


3. Business processes

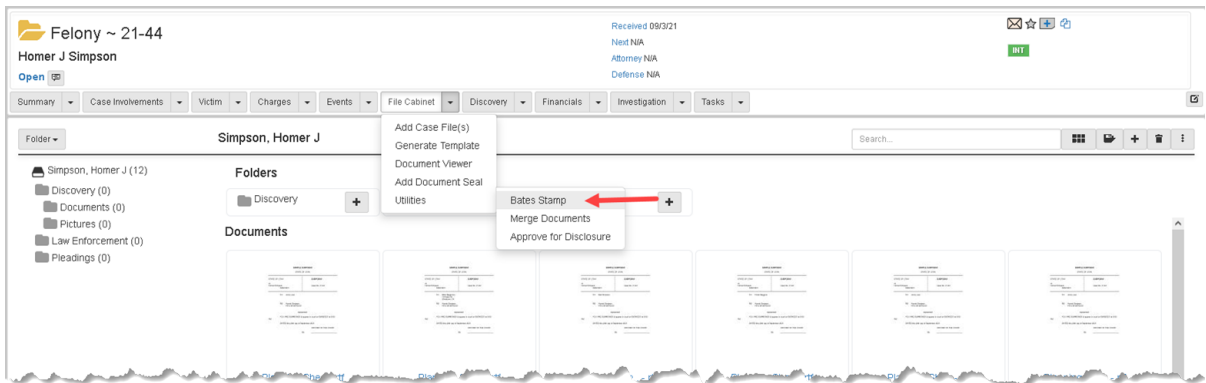
This section describes the business processes available in eAttorney.

Bates stamping

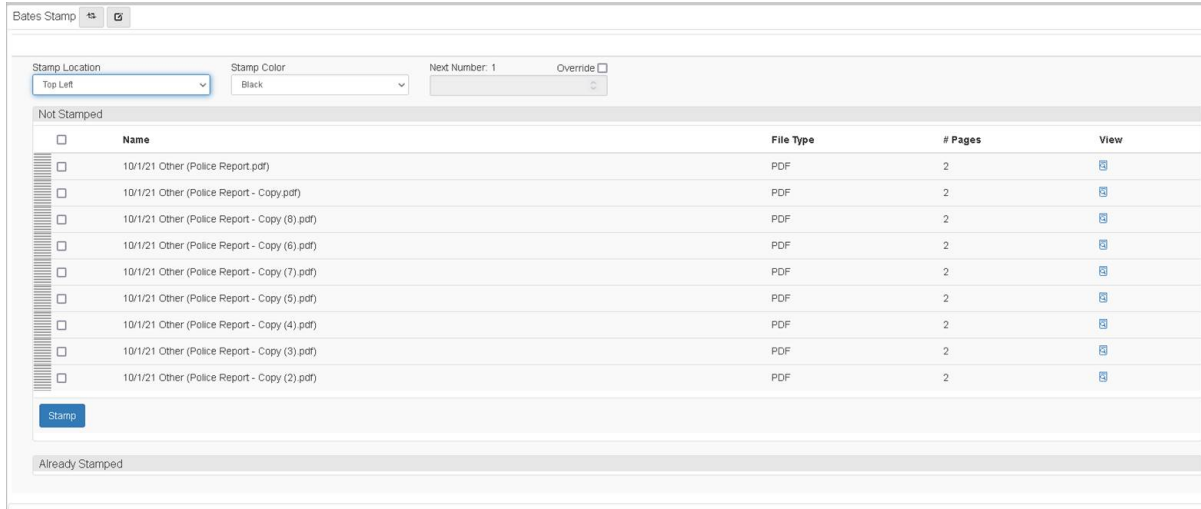
1. On the **File Cabinet Folder View**, click the dropdown menu:



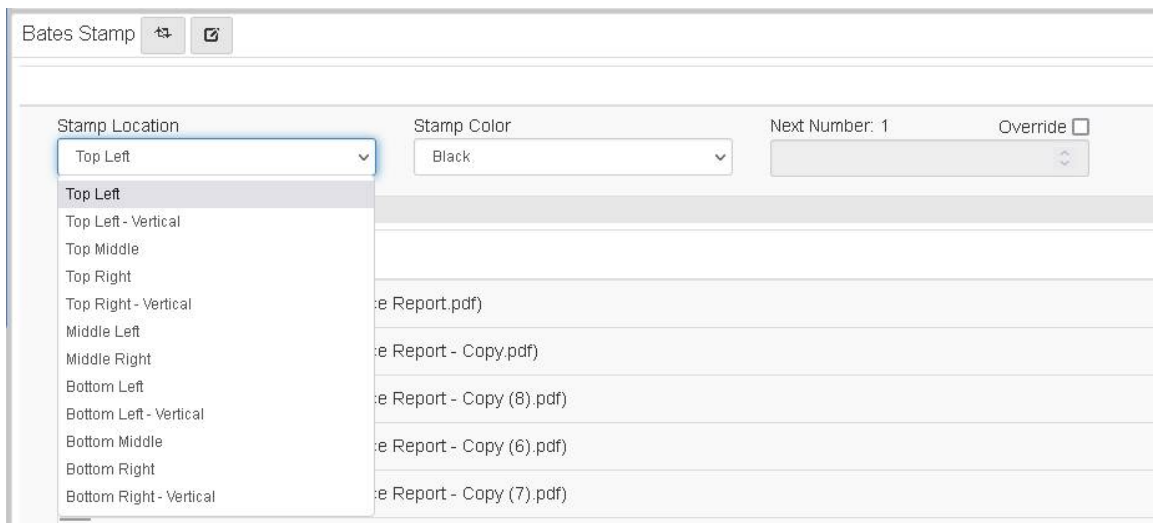
2. Hover over **Utilities** and select **Bates Stamp**. The **Bates Stamp** screen shows:



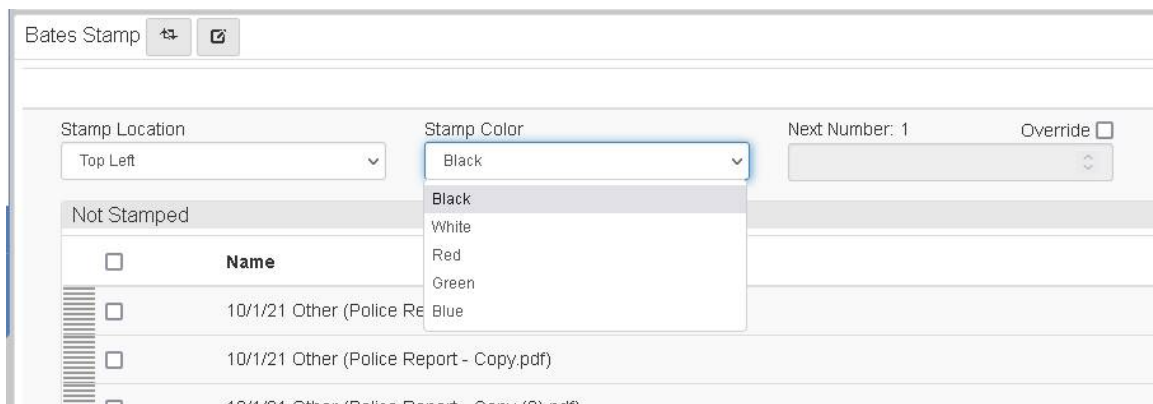
3. The **Bates Stamp** screen provides the following capabilities:



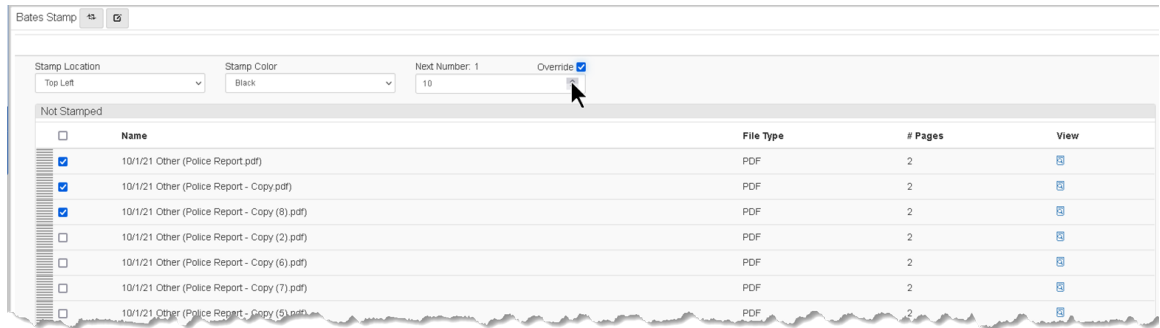
- Select the stamp location:



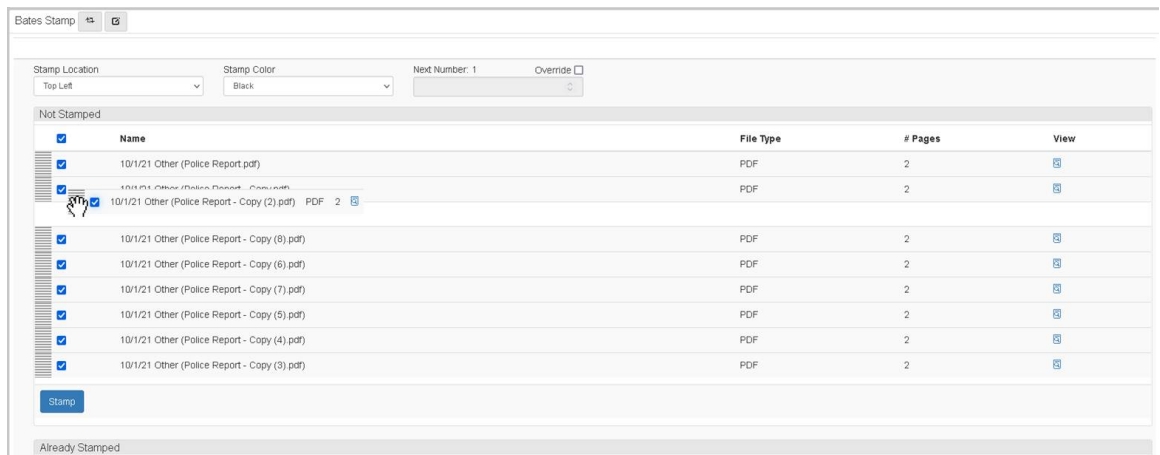
- Select the stamp color:



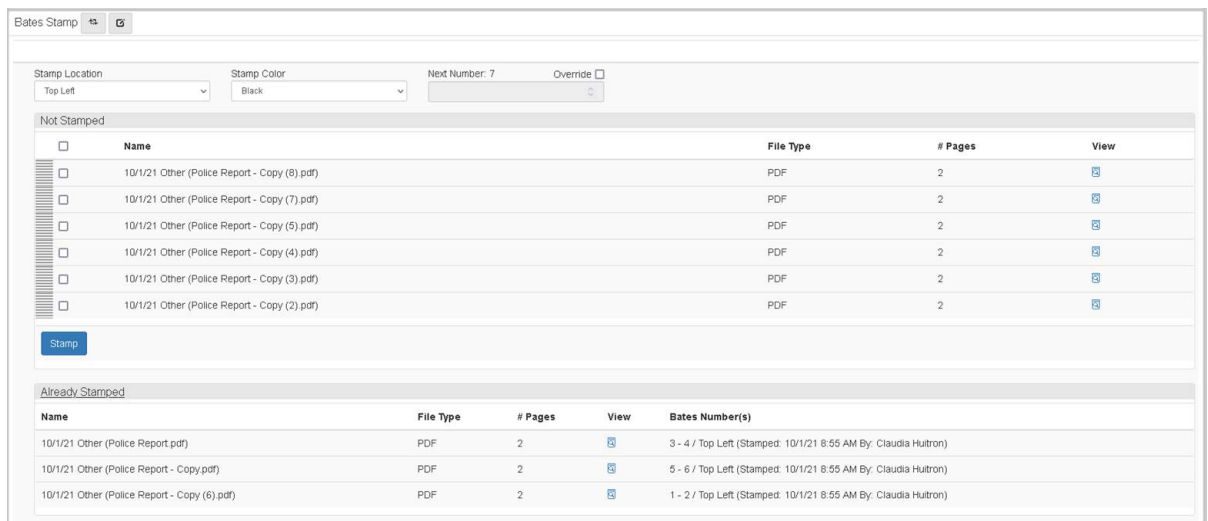
- Override the next number, if needed:



- Drag and drop the documents to order them accordingly:



4. Select some documents or all.
5. Once selected and ordered, click [**Stamp**].
6. Once the documents are stamped, they are listed in the **Already Stamped** section of the **Bates Stamp** screen:



7. The **Top Left** stamp shows as follows:



21-5 00003 ←

OFFENSE/INCIDENT REPORT										
INSTRUCTIONS ARE PRINTED SEPARATELY. IF ADDITIONAL SPACE IS NEEDED, USE REVERSE OF FORM; IDENTIFY ITEMS.										
1. TYPE <input type="checkbox"/> a. ORIGINAL <input type="checkbox"/> b. CONTINUATION <input type="checkbox"/> c. SUPPLEMENT OR FOLLOWUP										
2. CODE NO.	2a. SORT	3. TYPE OF OFFENSE OR INCIDENT				4. CASE CONTROL NUMBER				
5. BUILDING NUMBER		6. ADDRESS								
7. NAME OF AGENCY/BUREAU			8. AGENCY/BUREAU CODE		9. SPECIFIC LOCATION			10. LOCATION CODE		
11a. DATE OF OFFENSE/INCIDENT		11a. TIME OF OFFENSE/INCIDENT		12. DAY	13a. DATE REPORTED		13b. TIME REPORTED		14. DAY	
15. JURISDICTION (X) <input type="checkbox"/> EXCLUSIVE <input type="checkbox"/> CONCURRENT <input type="checkbox"/> PARTIAL <input type="checkbox"/> PROPRIETARY				16. NO. OF DEMONSTRATORS		17. NO. EVACUATED		a. TIME START	b. TIME END	
18. PERSONS INVOLVED	ID CODE (a)	NAME AND ADDRESS (b)				AGE (c)	SEX (d)	RACE (e)	INJURY CODE (f)	TELEPHONE (g)
		Last Name, First, Middle Initial								HOME
		Number, Street, Apt. No., City and State								BUSINESS
		Last Name, First, Middle Initial								HOME
	Number, Street, Apt. No., City and State								BUSINESS	



Bulk merge

1. To start a bulk merge, go to the person summary view by clicking the **Open Person View** icon:

High Profile

 **Felony ~ 22-1**
John Smith
[Open](#) 



Summary ▾ Case Involvements ▾ Victim ▾ Charges ▾ Events ▾


Case Summary  

Future Events

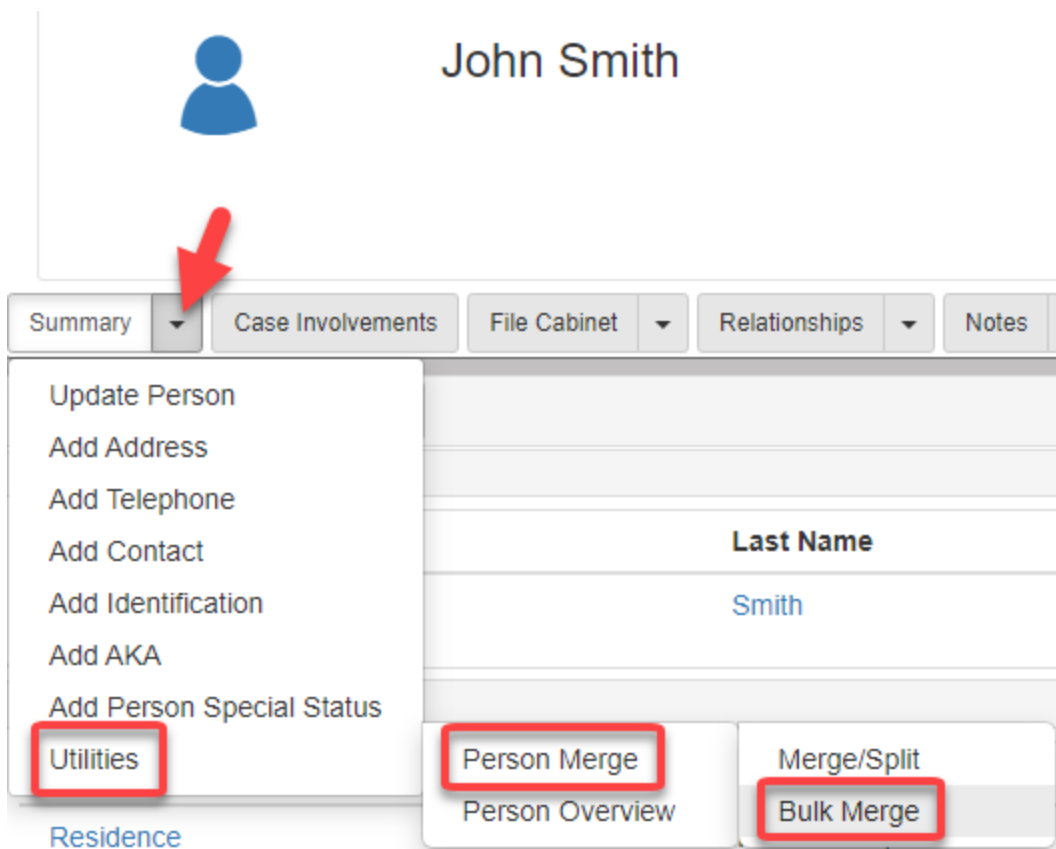
Type	Date
Preliminary Hearing	6/30/22 3:55 PM

Defendant

Type	Person
Defendant	Smith, John  



2. Click the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, then select **Bulk Merge**:



3. In the **Bulk Merge** search dropdown, select the search to execute:

John Smith

Summary Case Involvements File Cabinet Relationships **Note**

Type 1 - Name & 2 Pieces of Information Search

Type 1 - Name & 2 Pieces of Information

Type 2 - Name & 1 Piece of Information

Type 3 - Name Soundex

Type 4 - Name Soundex and Identification Number

Type 5 - Matching Identification Number

Type 6 - Fuzzy Match

4. On the **Bulk Merge** search screen, select the checkbox next to the person record that needs to merge with the current person record.
5. Click [**Merge**]:

Type 2 - Name & 1 Piece of Information Search

Possible duplicates are found matching on the Last Name / First Name / Middle Name (if it exists). First Name will also run a smart match. Either a matching DOB or Identification Number must also match

Search Results Merge

<input checked="" type="checkbox"/>	Name	Date of Birth	Identification(s)
<input checked="" type="checkbox"/>	John Smith	06/5/90	

6. The **Person Bulk Merge Confirmation** pop-up shows. Click [**Merge**].

Person Bulk Merge Confirmation



ID	First Name	Last Name
Person Bulk Merge Main Person		
8	John	Smith
List Of Merged Persons		
11	John	Smith

Cancel

Merge

7. The following message shows: **Person has been successfully merged..** Click **[OK]**.

Person has been successfully merged.

OK

Charging

Charges folder view

1. The Charges folder view displays active charges, plea offers, sentencing and charge history:

High Profile

Felony ~ 22-1
John Smith
Open

Received 06/23/22
Next N/A
Attorney Mayfield
Defense Robinson

Summary Case Involvements Victim Charges Events File Cabinet Discovery Financials Investigation Tasks

Charges

Active Charges

Count	Offense Date	Victim(s)
Smith, John [DEF]		
Count 1 163.185 Assault In The First Degree ...	06/07/2022	Mary Smith
Count 2 163.185 Conspiracy to commit Assault In The First Degree ...	07/27/2022	Mary Smith
Count 2 163.185 Conspiracy to commit Assault In The First Degree ...	07/27/2022	Mary Smith

Plea Offers

Type	Offer	Status
Smith, John [DEF]		
Admit Guilt	This is an offer.	Review

Charge History

Count	Offense Date	Victim(s)
Smith, John [DEF]		

Sentencing Per Charge

Smith, John [DEF]

- Count 1 163.185 Assault In The First Degree ...
- Count 2 163.185 Conspiracy to commit Assault In The First Degree ...
- Count 2 163.185 Conspiracy to commit Assault In The First Degree ...

Sentencing Per Person

Smith, John [DEF]

- Restitution 2 Month(s)

2. In the **Charges** folder View, click the dropdown and select **Charging**:

High Profile

Felony ~ 22-1
John Smith
Open

Summary Case Involvements Victim Charges Events F

Charges

Active Charges

Add Charge
Charging

3. The **Charging** widget shows, where the charge decision can be selected: **Decline to File**, **File with Court**, or **Replace Charge**:

Charging

Smith, John [DEF] Add Charge Charge Status is Active

#	Stage	Statute	Related Parties	Decision
1	Referred by Law Enforcement	Count 1 163.185 Assault In The First Degree ...		▼
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		▼
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		▼

Decision for all: ▼ Save Save and Back Back

4. You can make different Decisions on the requested Charges:

Charging

Smith, John [DEF] Add Charge Charge Status is Active

#	Stage	Statute	Related Parties	Decision
1	Referred by Law Enforcement	Count 1 163.185 Assault In The First Degree ...		File with Court ▼ File As: Count 1 163.185 Assault In The First Degree
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		Decline to File ▼ Reason ▼
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		Replace Charge ▼ Reason ▼ Replace With: <input type="text"/>

Decision for all: ▼ Save Save and Back Back

5. If the Decision is the same for all requested Charges, you can add the decision to all by selecting the Decision from the Decision for all dropdown:

Charging

Smith, John [DEF] Add Charge Charge Status is Active

#	Stage	Statute	Related Parties	Decision
1	Referred by Law Enforcement	Count 1 163.185 Assault In The First Degree ...		File with Court ▼
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		File with Court ▼
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ...		File with Court ▼

Decision for all: ▼ Save Save and Back Back

Decline to File
File with Court

6. You can also Replace a charge and select a new charge from the search option provided on the Replace with field:

Charging

Smith, John [DEF] Add Charge Charge Status is Active

#	Stage	Statute	Related Parties	Decision
1	Referred by Law Enforcement	Count 1 163.185 Assault In The First Degree ...		Replace Charge ▼ Reason ▼ Replace With: <input type="text"/>

Replace Charge ▼
Decline to File
File with Court
Replace Charge

- You can start typing the name of the statute, or click the magnifying glass, to find the new charge:

Reason




Replace With:  




7. Once you have completed the Charging decision, click **[Save]** or **[Save and Back]**. The **Charges Folder View** shows the active charges and **Charge History**:

Charging

Smith, John [DEF]

#	Stage	Statute
1	Referred by Law Enforcement	Count 1 163.185 Assault In The First Degree ... 
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ... 
2	Referred by Law Enforcement	Count 2 163.185 Conspiracy to commit Assault In The First Degree ... 


Decision for all:



Generate charging paragraphs

1. To generate the Charging Paragraphs, from the Charges folder view, click the dropdown menu, hover over Charging, and click **[Charging Paragraphs]**:

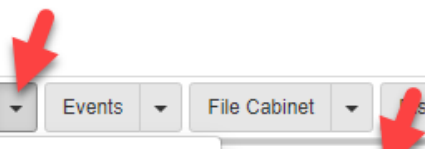
High Profile

 **Felony ~ 22-1**
 John Smith

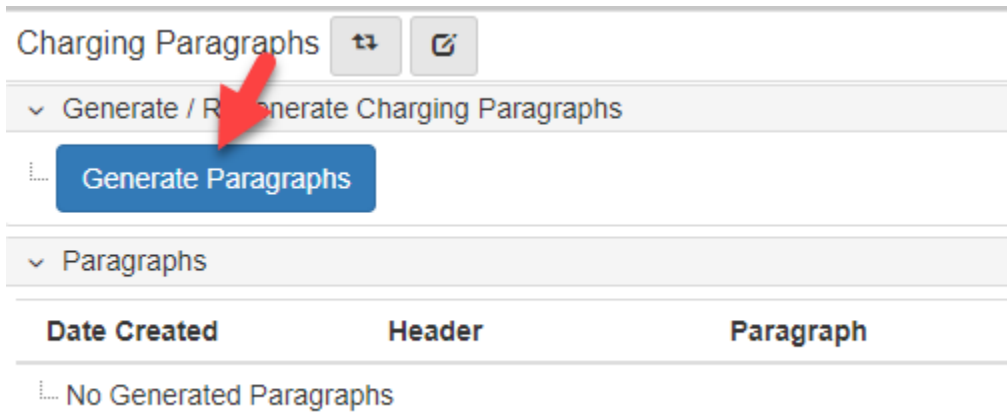
Summary | Case Involvements | Victim | **Charges** | Events | File Cabinet | Discovery

Charges

Active Charges

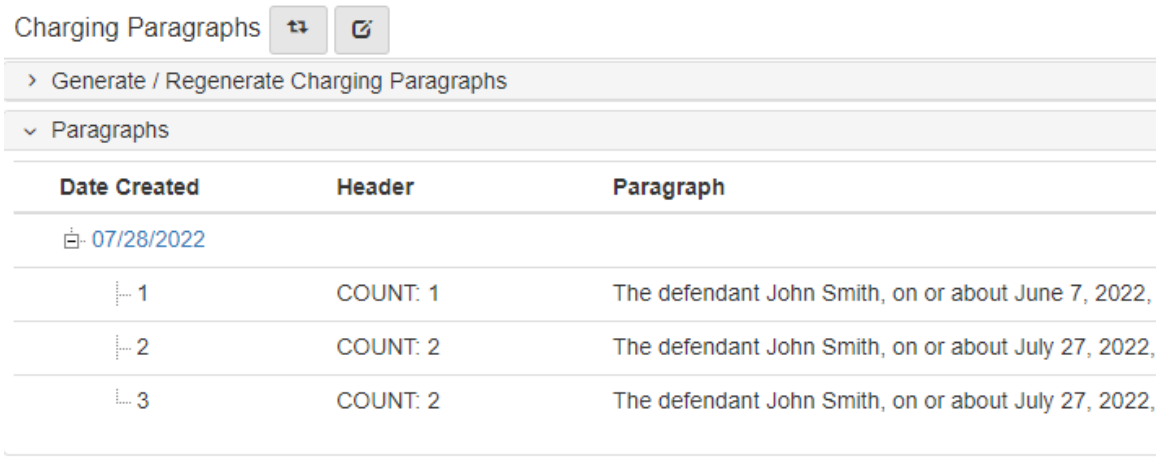


2. In the **Charging Paragraphs Folder View**, click [**Generate Paragraphs**]:



The screenshot shows the 'Charging Paragraphs' folder view. At the top, there are two icons: a refresh icon and a share icon. Below them is a dropdown menu with the text 'Generate / Regenerate Charging Paragraphs'. A red arrow points to a blue button labeled 'Generate Paragraphs' within this dropdown. Below the dropdown is another dropdown menu labeled 'Paragraphs'. At the bottom, there is a table header with columns 'Date Created', 'Header', and 'Paragraph', and a row of text that says 'No Generated Paragraphs'.

◦ Charging Paragraphs:

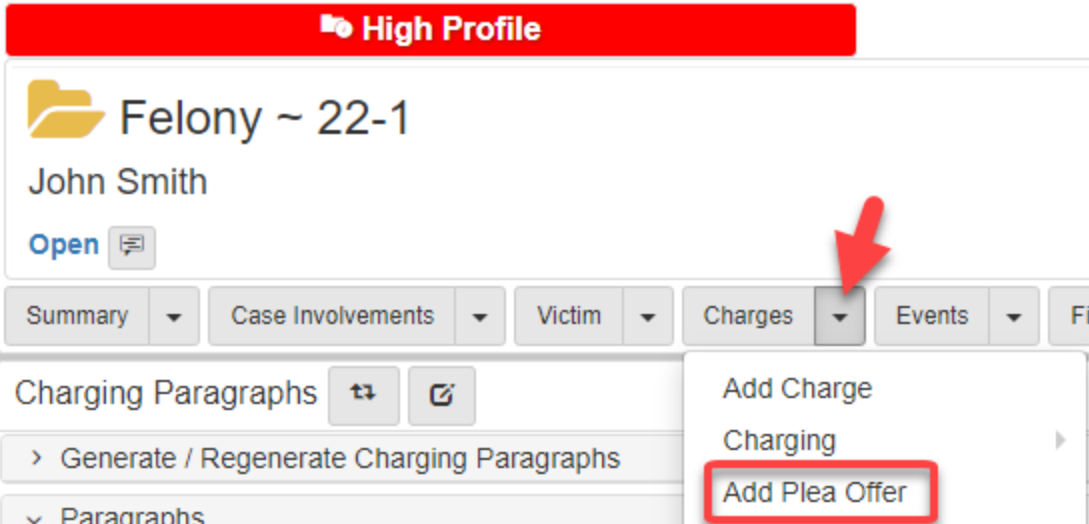


The screenshot shows the 'Charging Paragraphs' folder view with a table of generated paragraphs. The table has three columns: 'Date Created', 'Header', and 'Paragraph'. The first row shows a date '07/28/2022'. The subsequent rows show paragraph numbers 1, 2, and 3, each with a 'COUNT' and a description of the defendant and date.

Date Created	Header	Paragraph
📅 07/28/2022		
1	COUNT: 1	The defendant John Smith, on or about June 7, 2022,
2	COUNT: 2	The defendant John Smith, on or about July 27, 2022,
3	COUNT: 2	The defendant John Smith, on or about July 27, 2022,

Plea offer

1. To add a Plea Offer, from the Charges folder view, click the dropdown menu, and click [**Add Plea Offer**]:



2. The Add Plea Offer form shows. Once the form is filled, click [**Save & Back**]:

A screenshot of the 'Add Plea Offer' form. At the top, there is a dropdown menu for 'Add Plea Offer' with the value 'Add to Smith, John [DEF]'. Below this is a tabbed interface with 'John Smith Open Cases' selected. The main form area is titled 'Plea Offer' and contains several fields: 'Type*' with a dropdown menu set to 'Admit Guilt'; 'Offer*' with a rich text editor toolbar and a large text area; 'Expiration Date' with a date picker; and 'Status' with a dropdown menu set to 'Review'. At the bottom of the form, there are three buttons: 'Save & Back' (highlighted with a red arrow), 'Save & Add Another', and 'Back'.

3. The Plea Offer shows in the Plea Offers panel in the Charging folder view:

Charges [refresh] [edit]

Active Charges

Count

Smith, John [DEF] [dropdown]

Count 1 163.185 Assault In The First Degree -... [menu]

Count 2 163.185 Conspiracy to commit Assault In The First Degree -... [menu]

Plea Offers

Type	Offer
Smith, John [DEF]	
Admit Guilt	This is an offer.
Admit Guilt	Example plea offer.

Disposing charges

1. To dispose charges, from the Charges folder view, click the dropdown menu and click [Dispose Charges]:

High Profile

Felony ~ 22-1

John Smith

Open [comment]

Summary [dropdown] Case Involvements [dropdown] Victim [dropdown] **Charges** [dropdown] Events [dropdown] F

Charges [refresh] [edit]

Active Charges

Count



Add Charge

Charging [dropdown]

Add Plea Offer

Dispose Charges

2. The Dispose Charges form, where different dispositions can be added to each charge, shows:



Dispose Charges  

▼ Smith, John [DEF] **Mass Update**



Charge	Plea	Plea Date	Disposition Type	Disposition Date
Count 1 163.185 Assault In The First Degree - ...				
Count 2 163.185 Conspiracy to commit Assault In The First Degree - ...				

Disposition Type dropdown menu:

- Decline to File
- File with Court
- Replace Charge
- Guilty
- Found Not Guilty

Save & Back  **Back** 

- You can add the same disposition to all charges by clicking the **[Mass Update]** button:



Dispose Charges  

▼ Smith, John [DEF] **Mass Update**

Charge

Count 1 163.185 Assault In The First Degree -... - Decline to File

Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File

Save & Back  **Back** 

- Click some or all of the charges that have the same disposition type and select Update Charge Disposition from the Choose Action menu.
- If all charges have the same disposition, you can select the checkbox in the column header:

Search Case Involvement Charge

Involvement Smith, John [DEF]

Statute

<input checked="" type="checkbox"/>	Charge
<input checked="" type="checkbox"/>	Count 1 163.185 Assault In The First Degree -... - Decline to File
<input checked="" type="checkbox"/>	Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File

Choose Action Results 1 - 2 of 2

- Choose Action
- Mass Update Forms**
- Update Charge Disposition**

6. After clicking the [**Update Charge Disposition**], all the selected charges show in the top panel, and a blank disposition form shows. Once the form is completed, click [**Update Records**].

- The disposition is added to the selected charges:

Mass Update, Charge Records:

- 1. Count 1 163.185 Assault In The First Degree -... - Decline to File: 22-1 x
- 2. Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File: 22-1 x

Update Charge Disposition ↔ 📄

▼

Plea ▼

Plea Date 📅

Disposition Type ▼

Disposition Date 📅

Update 2 Records Back

7. The Charges and corresponding Dispositions show in the Sentencing panel of the Charges folder view:

Charges ↔ 📄

📁 **Active Charges**

> Plea Offers

📁 Charge History

▼ **Sentencing Per Charge**

📁 **Smith, John [DEF]**

- └─ Count 1 163.185 Assault In The First Degree -... - Decline to File
- └─ Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File

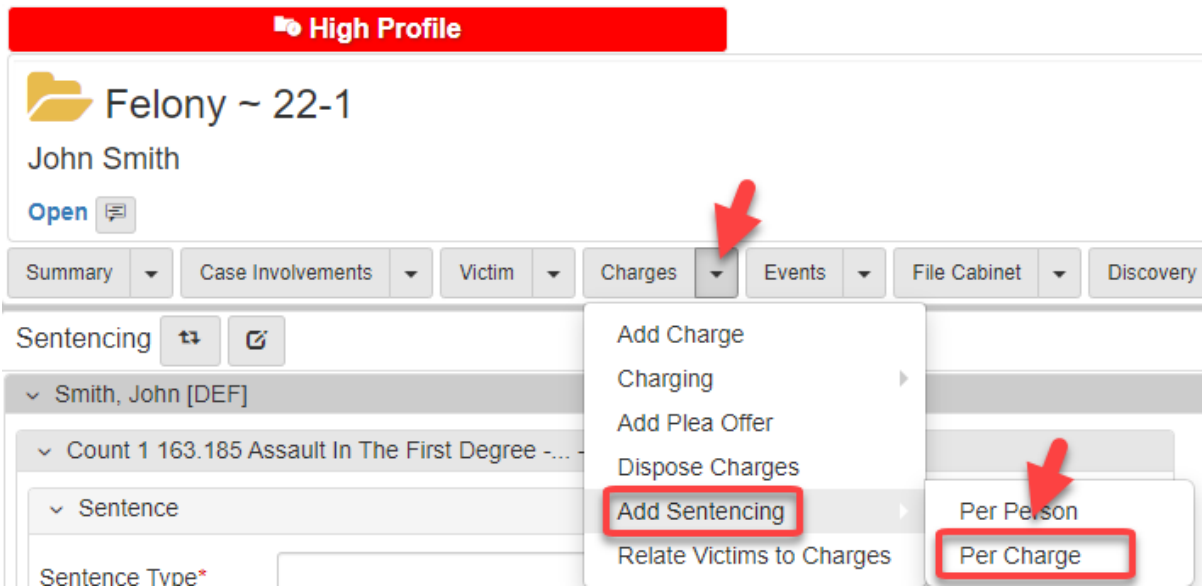
▼ Sentencing Per Person

📁 **Smith, John [DEF]**



- └─ Restitution 2 Month(s)

Sentencing

1. To add Sentencing information, from the Charges folder view, click the dropdown menu, hover over Add Sentencing, and click **[Per Charge]**.





2. The Sentencing form, where sentencing can be added per charge, shows:

Sentencing  


▼ Smith, John [DEF]

▼ Count 1 163.185 Assault In The First Degree -... - Decline to File

▼ Sentence  

Sentence Type*

Length/Unit*


Sentence Begin Date 07/28/2022 

Method



Amount Suspended

Amount Reduced To

Credit Days


 Sentence

▼ Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File

▼ Sentence  

Sentence Type*

Length/Unit*


Sentence Begin Date 07/28/2022 

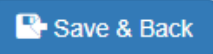

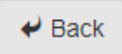

Method

Amount Suspended



Amount Reduced To

Credit Days

 Sentence



 Save & Back   Back 

- If multiple sentences need to be added to a single charge, click the add item button [+]. If you inadvertently added panels, click the delete button [-].

Sentencing  


▼ Smith, John [DEF]

▼ Count 1 163.185 Assault In The First Degree -... - Decline to File

▼ Sentence  

Sentence Type*

Length/Unit*


Sentence Begin Date 07/28/2022 

Method



Amount Suspended


Amount Reduced To

Credit Days


 Sentence

4. The Charges and corresponding Sentencing shows in the Sentencing panel of the Charges folder view:

Charges  

 **Active Charges**

> Plea Offers

 Charge History

▼ **Sentencing Per Charge**

 **Smith, John [DEF]**

- ┆ Count 1 163.185 Assault In The First Degree -... - Decline to File
- ┆ Count 2 163.185 Conspiracy to commit Assault In The First Degree -... - Decline to File

▼ Sentencing Per Person

 **Smith, John [DEF]**

- ┆ Restitution 2 Month(s)

Investigation requests

Add an investigation request

1. Creating an investigative request can be done through the Investigation folder view by clicking the Investigation dropdown arrow and then **[Add Investigation Request]**:

The screenshot shows a case interface for 'Felony ~ 22-1' by John Smith. A red banner at the top indicates 'High Profile'. The interface includes a navigation bar with tabs for Summary, Case Involvements, Victim, Charges, Events, File Cabinet, Discovery, Financials, Investigation, and Tasks. The 'Investigation' tab is selected, and the 'Add Investigation Request' button is highlighted with a red box. A red arrow points to the 'Add Investigation Request' button.

2. Click the **Request Details** text box and add details:

The screenshot shows the 'Add Investigation Request' form. The 'Request Details*' text box is highlighted with a red box and labeled '1'. The 'Due Date*' field is empty, and the date icon is highlighted with a red box and labeled '2'. The 'Task' pane is expanded, showing the 'Type*' dropdown menu highlighted with a red box and labeled '3'. The 'Note' text box is highlighted with a red box and labeled '4'. At the bottom, there are three buttons: 'Save & Back', 'Save & Add Another', and 'Back'.

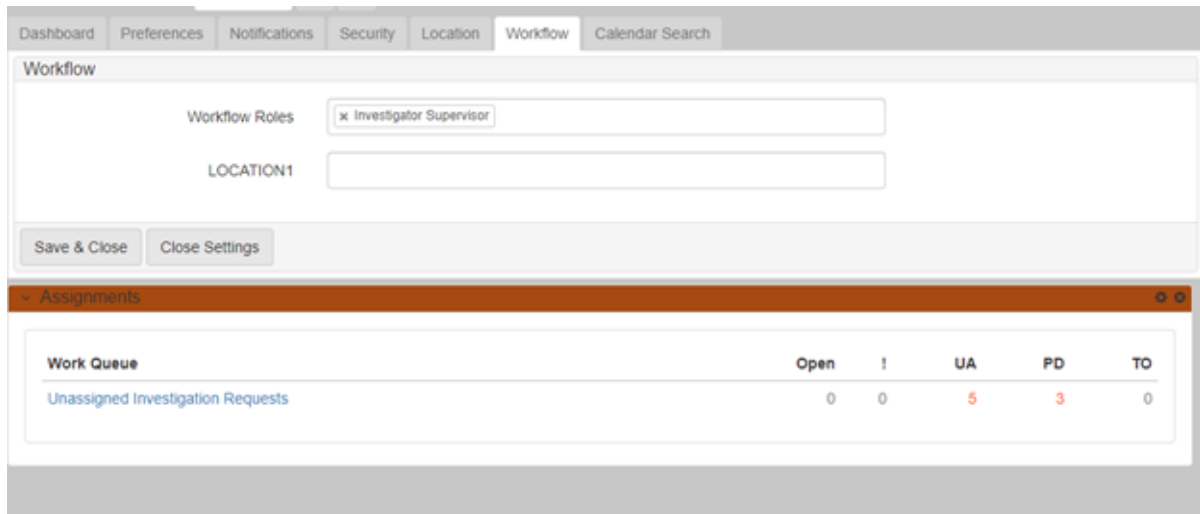
3. Click the date icon and choose the date.
4. In the Task pane, select the type of task from the drop down arrow.
5. In the Task pane, add a note.

Unassigned investigation requests

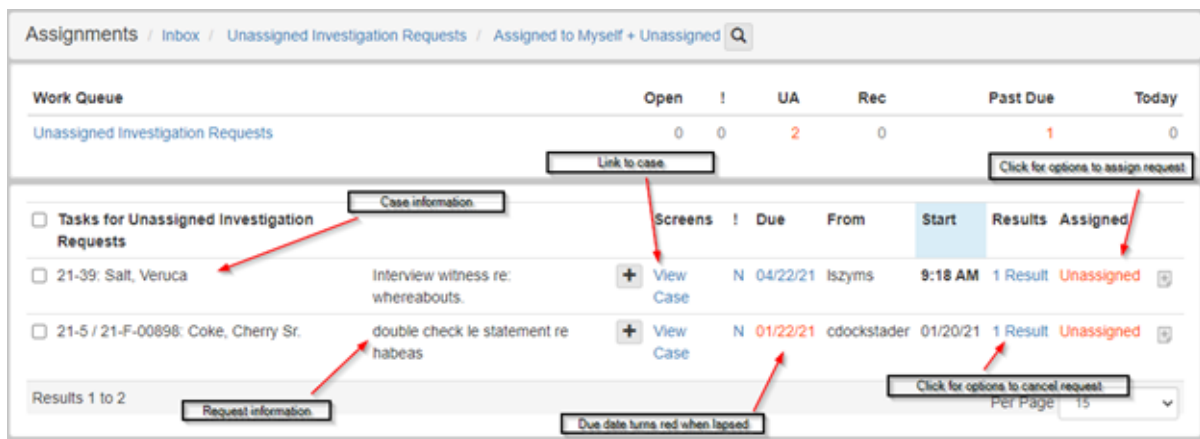
1. When an investigation request (caseResearchRecord) is added to the case:

- eAttorney sets the status to **Pending**.
- A work queue assignment called **Unassigned Investigation Requests** is created.

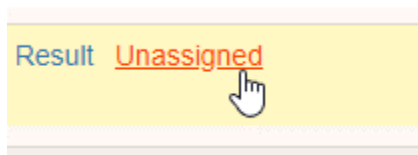
The assignment shows in the queue for anyone with the **Investigator Supervisor** workflow role:



2. Click the work queue to view the list of unassigned investigation requests:



3. Assigns the Investigation request by clicking the red **Unassigned** under the Assigned column:



4. Click **[+]** to navigate into a directory search where you can choose the request assignee:



21-39: Salt, Veruca Interview witness re: whereabouts. **+** View Case N 04/22/21 Iszyms 04/5/21 1 Result **+** **X**

Name Org Name

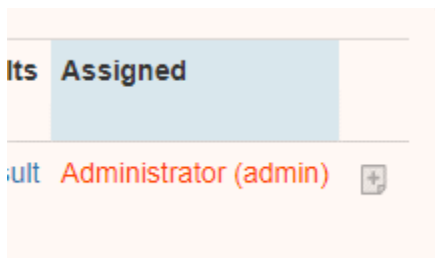
ID Number Org Type All

Group All Organization

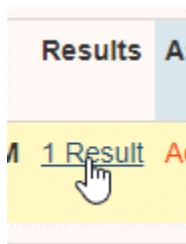
Role All

Name	Role	Organization	Location	Phone	Email
Acevedo, Michael (System Administrator) macevedo	System Administrator				macevedo@journaltech.com
Administrator (admin)					admin@sustain.net
Bailey, Megan (System Administrator) mbailey	System Administrator				mbailey@journaltech.com

- The chosen assignee is listed in red under the Assigned column. The action of assigning the request closes out the workflow. This work queue drops off the queue on screen refresh:



- You can cancel the investigation request by clicking the results and choosing **Cancel** from the drop down:



- This action also closes out the workflow and the work queue drops off the queue on refresh:



The workflow is also closed out when the status is manually changed to **Completed** or **Canceled** inside the Update Investigation Request form.

Assigned investigation requests

1. Once an assignee is set on an Investigation Request, a work queue called **Investigation Requests** is assigned to the request assignee:

Assignments / Inbox

All Locations Assigned to Myself [WQ Roles: Investigator Supervisor]

Work Queue	Open	!	UA	Rec	Past Due	Today
Investigation Requests	1	0	0	1	1	0

2. Clicks the work queue to view the list of unassigned investigation requests.

Work Queue	Open	!	UA	Rec	Past Due	Today
Investigation Requests	1	0	0	1	1	0

<input type="checkbox"/> Tasks for Investigation Requests	Screens	!	Due	From	Start	Results	Assigned
<input type="checkbox"/> 21-5 / 21-F-00896: Coke, Cherry Sr. double check le statement re habeas	+ View Case	N	01/22/21	Iszmys	7:54 AM	2 Results	Iszmys

Results 1 to 1 Per Page 15

3. When the request is complete, click the results and select **Complete** in the dropdown:

Results As

[2 Results](#) Isz

Results

▼ X

Complete

Cancel Page

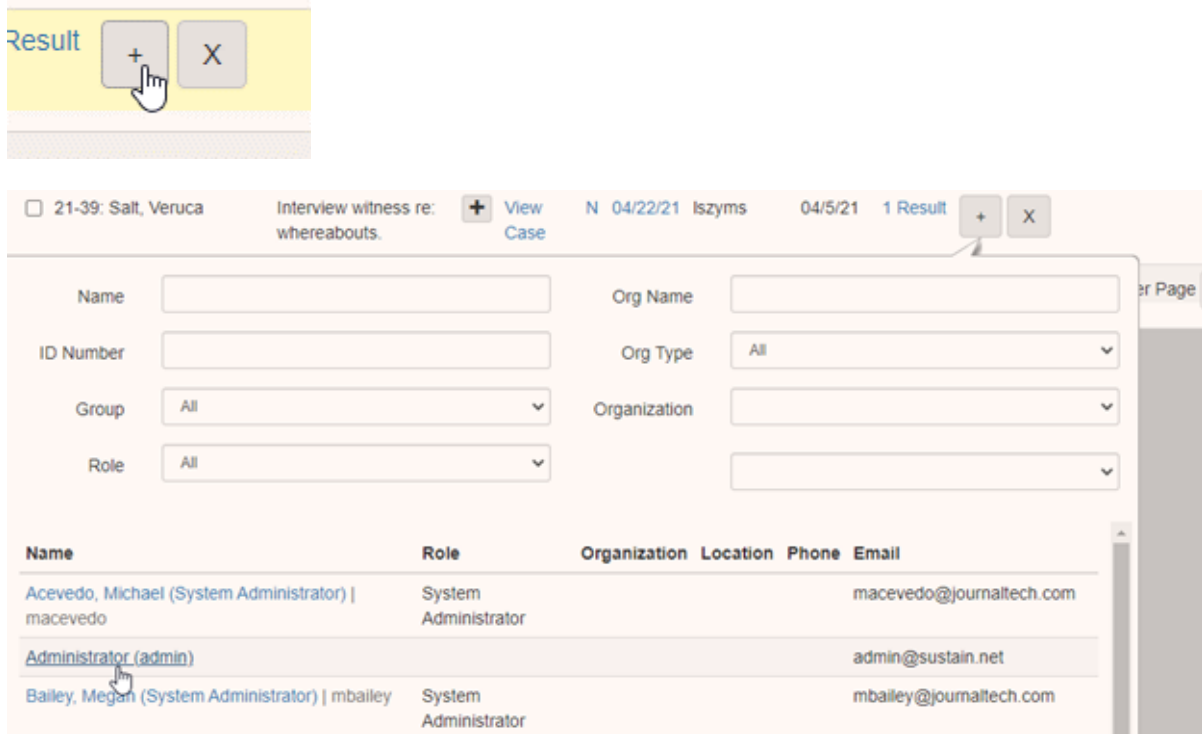
This changes the status of the request to completed and closes out the workflow. The work queue drops off the queue on refresh.

4. You can reassign the request by clicking your username in the **Assigned** column.

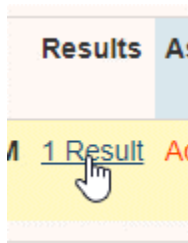
Assigned

[Iszmys](#)

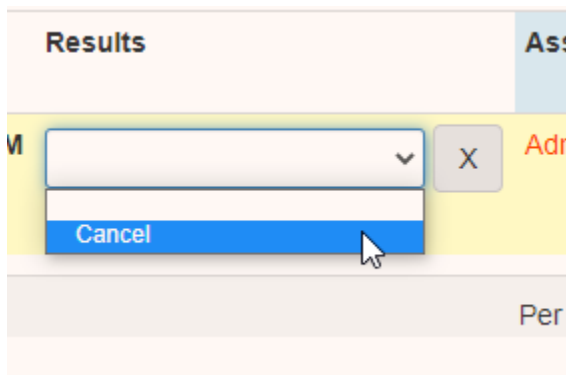
5. Click [+] to navigate into a directory search where you can choose the new request assignee:



6. You can cancel the investigation request by clicking in the results:



Then choose "Cancel" from the drop down.



This action also closes out the workflow and the work queue drop offs the queue on refresh.



The workflow is also closed out then the status is manually changed to **Completed** or **Canceled** inside the Update Investigation Request form:

Update Investigation Request

Request Details*

Interview witness re: whereabouts.

Due Date* 04/22/2021

Status* Pending

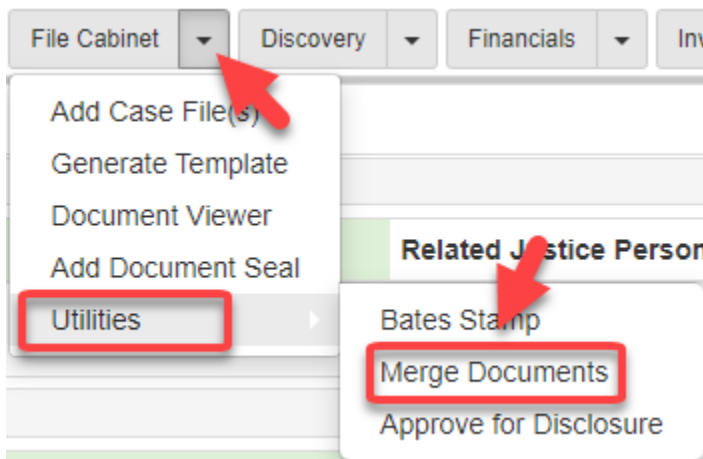
Task

Type* Complete

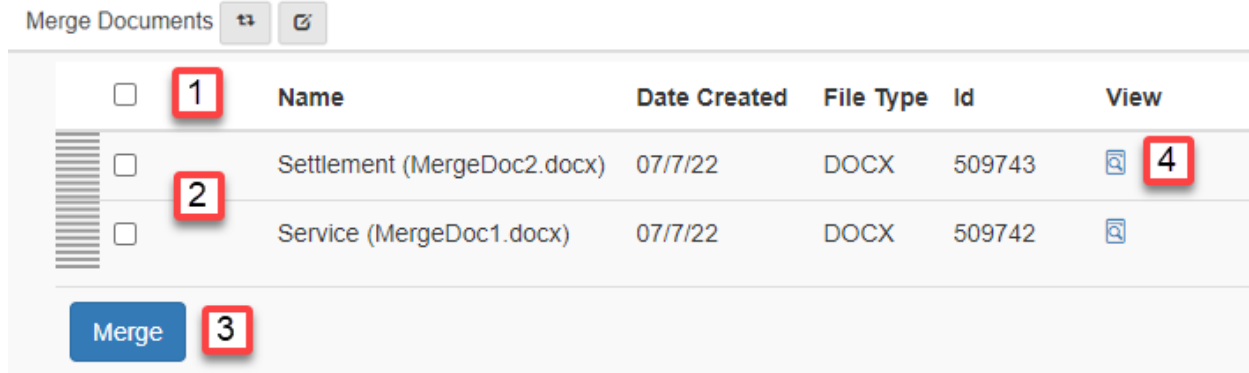
Note

Merge documents

The merge documents utility creates a combined PDF file for printing or downloading. To start merging your documents, click the **File Cabinet** dropdown, hover over **Utilities**, and select **Merge Documents**.

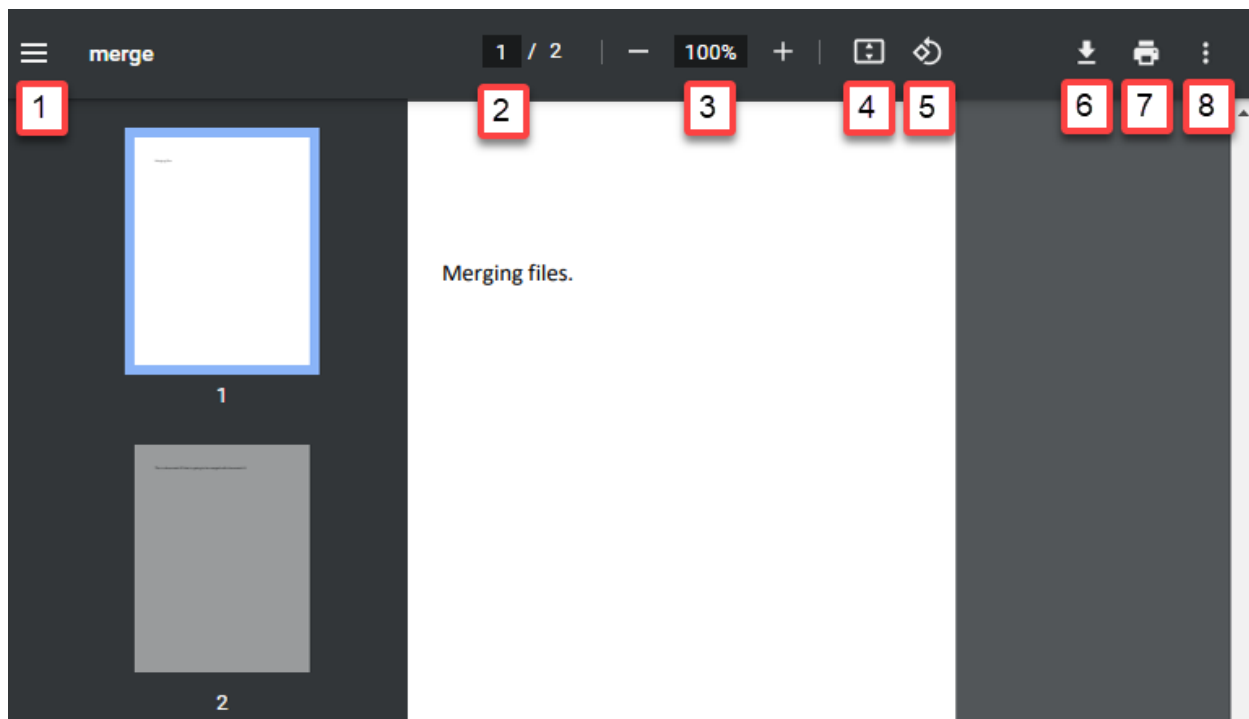


The **Merge Documents** screen shows:



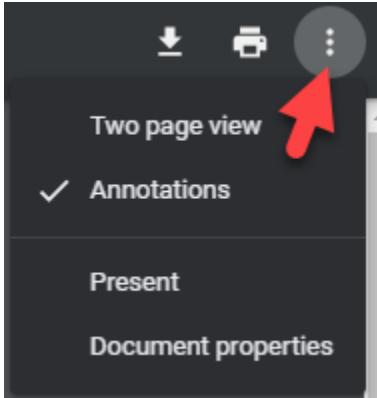
1. You can select all files.
2. Or you can select individual files.
3. Then click [**Merge**].
4. You can also view your files with the **View Document** icon.

After you click [**Merge**], the documents that you selected merge into one document and show in a new window:



1. Expand or collapse your thumbnail icons.
2. Type the page you want to view.

3. Select your desired zoom.
4. Fit your document to page.
5. Rotate your document.
6. Download your document.
7. Print your document.
8. Select from a list of options as shown:



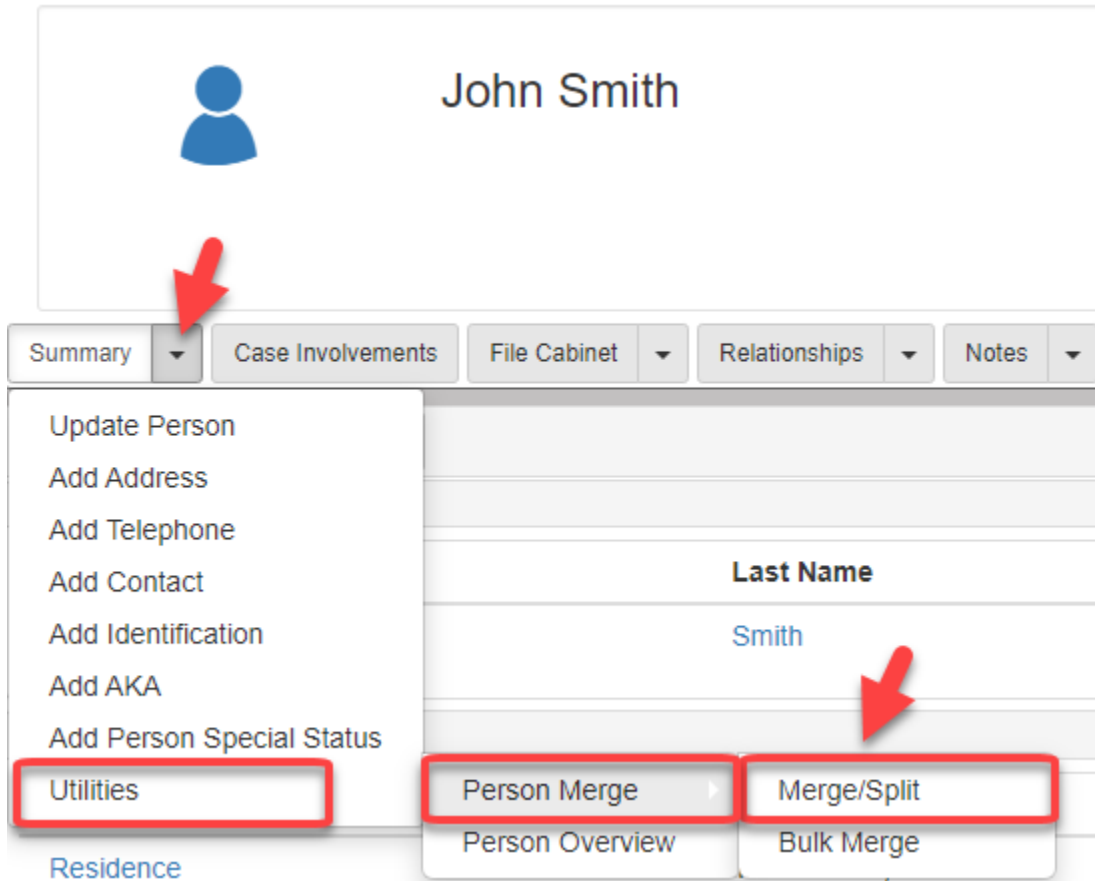
Person merge or split

Person merge

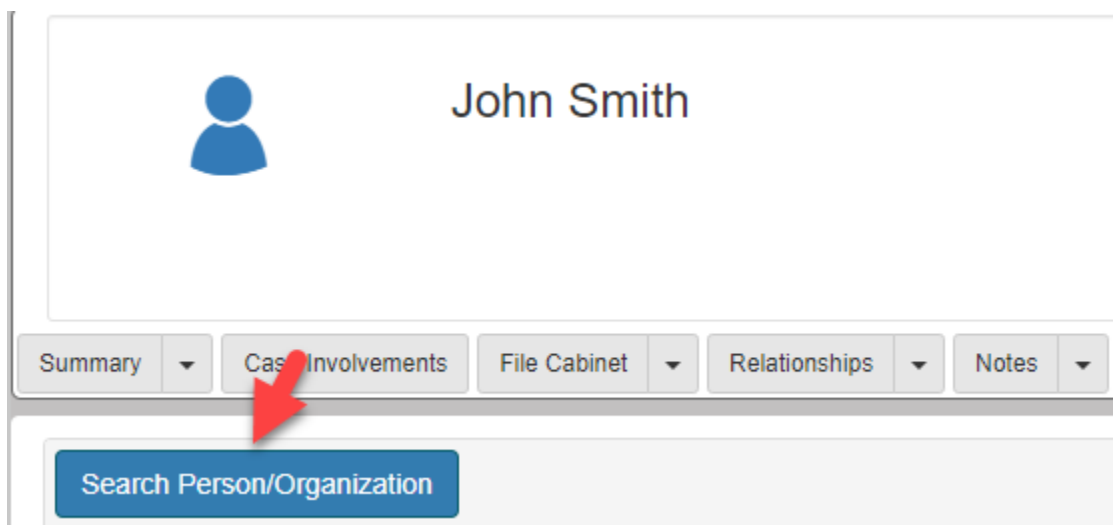
1. To start a person merge, go to the person summary view by clicking the Open Person View icon:



2. Click the **Summary**, hover over **Utilities**, hover over **Person Merge**, then select **Merge/Split**:



3. In the **Person Summary View**, click [**Search Person Organization**]:



4. In the **Search Person/Business** screen, you can search on **First Name/Business Name**,

Last Name, Identification Number, Date of Birth, and Person Type. Enter your search criteria, then click [**Search**]:

Search

▼ Search Person/Business

First Name / Business Name

Last Name

Identification Number

Date Of Birth

Person Type

Search
Clear
Refine
Add Criteria

5. In the **Results**, select the person you want to merge:

Search

▼ Search Person/Business

First Name / Business Name

Last Name

Identification Number

Date Of Birth

Person Type

Search
Clear
Refine
Add Criteria

Results 1 - 1 of 1

First Name / Business Name	Middle Name	Last Name	Date Of Birth	Identification(s)	AKA(s)	Person Type
John		Smith	06/05/1990	DL # 123-456-789		Person

Results 1 - 1 of 1

6. After executing the search, three results show which include your original person, the person to merge with, and the merged result:

Search Person/Organization
Switch To Split

<div style="background-color: #e0f0ff; padding: 2px; margin-bottom: 5px;">John Smith Original</div> <div style="background-color: #e0ffe0; padding: 2px;"> <p>First Name John</p> <p>Last Name Smith</p> <p>Status Active</p> </div>	<div style="background-color: #0056b3; color: white; padding: 2px; margin-bottom: 5px;">John Smith Merged Result</div> <div style="background-color: #e0f0ff; padding: 2px;"> <p>First Name <input type="text" value="John"/></p> <p>Last Name <input type="text" value="Smith"/></p> <p>Status <input type="text" value="Active"/></p> <p>Add field...</p> </div>	<div style="background-color: #e0f0ff; padding: 2px; margin-bottom: 5px;">John Smith To Merge</div> <div style="background-color: #e0ffe0; padding: 2px;"> <p>First Name John</p> <p>Last Name Smith</p> <p>Status Active</p> </div>
---	---	---

7. To finish your merge, you need to select which subentities you want to omit for your merged result. Select to omit the subentity from the original person or select to omit the subentity from the person to merge with:

Subentities — If necessary, select subentities to omit from resulting merge

Addresses							
	Zip	City	Address Type	Address 1	State	Effective From	Omit <input type="checkbox"/>
Original Person	10001	New York	Res	1234 Brooklyn Street	Ny	23062022	<input type="checkbox"/>
Person to Merge With	10001	New York	Res	1234 Brooklyn Street	Ny	23062022	<input type="checkbox"/>

- After you finish selecting the subentities you want to keep, click [**Preview Changes**] at the bottom of your screen:

Preview Changes

- Review your changes from the **Preview Changes** screen. Click [**Save**] to save the changes, or [**Close**] to edit the changes:

Preview Changes x

John Smith		Preview
First Name	John	
Last Name	Smith	
Status	Active	

Addresses

Zip	City	Address Type	Address 1	State	Effective From
10001	New York	Res	1234 Brooklyn Street	Ny	23062022

Telephones

Telephone Number	Telephone Type	Effective From
1234567890	Cell	23062022

Relationships Inverse

Inverse	Relationship Type	Relationship Sub Type	Related Person	Parent Person
6	Family	Sibling	8	10

Relationships

Inverse	Relationship Type	Relationship Sub Type	Related Person	Parent Person
5	Family	Sibling	10	8

- Click [**Cancel**] or [**Save**] on your **Person Merge**:

Save Changes
✕

This will update the record for **John Smith**.

Are you sure you want to save these changes?

Cancel
Save

Person split

1. To start a person split, go to the person summary view by clicking the **Open Person View** icon:

High Profile

📁
Felony ~ 22-1

John Smith

Open ☰

Summary ▾

Case Involvements ▾

Victim ▾

Charges ▾

Events ▾

Case Summary ↔ 📄

▾
Defendant

Type	Person
Defendant	Smith, John 👤

2. Click the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, then select **Merge/Split**:

John Smith

Summary Case Involvements File Cabinet Relationships Notes

- Update Person
- Add Address
- Add Telephone
- Add Contact
- Add Identification
- Add AKA
- Add Person Special Status
- Utilities**

Residence

Last Name
Smith

Person Merge Merge/Split
Person Overview Bulk Merge

3. Click [**Switch To Split**] to the right of your screen:

Switch To Split

To Merge	
First Name	
Last Name	
Status	Active

4. You can choose to copy all information over, or copy items individually with the arrow buttons. When you are finished copying the desired information, click [**Preview Changes**] at the bottom of the screen:

John Smith		Original
Name Prefix		
First Name	John	
Last Name	Smith	
Status	Active	

Copy All ▶▶

▶

▶

▶

John Smith		New Record
Name Prefix	<input type="text"/>	
First Name	<input type="text" value="John"/>	
Last Name	<input type="text" value="Smith"/>	
Status	<input type="text" value="Active"/>	
	<input type="text" value="Middle Name"/>	▼

5. Preview your changes then click **[Save]**:

Preview Changes

John Smith - Updated Original

John Smith - New Record

John Smith		Preview
First Name	John	
Last Name	Smith	
Status	Active	

Profiles

Gender	Ethnicity	Eye Color	Weight	Date Of Birth	Hair Color	Primary Language	Height
Male	White	Brown	200	05061990	Brown	Engl	60

Save

Close

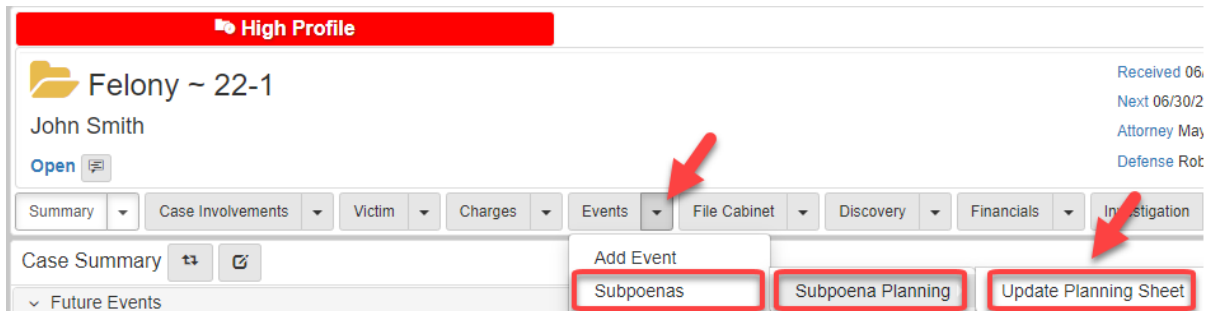
Subpoena process

Required conditions to generate a subpoena

- Subpoenable Events - Events where witnesses are typically subpoenaed.
- Subpoenable Parties - Parties that can be subpoenaed.
- Subpoenable Case Assignments - Assignments that can be subpoenaed.

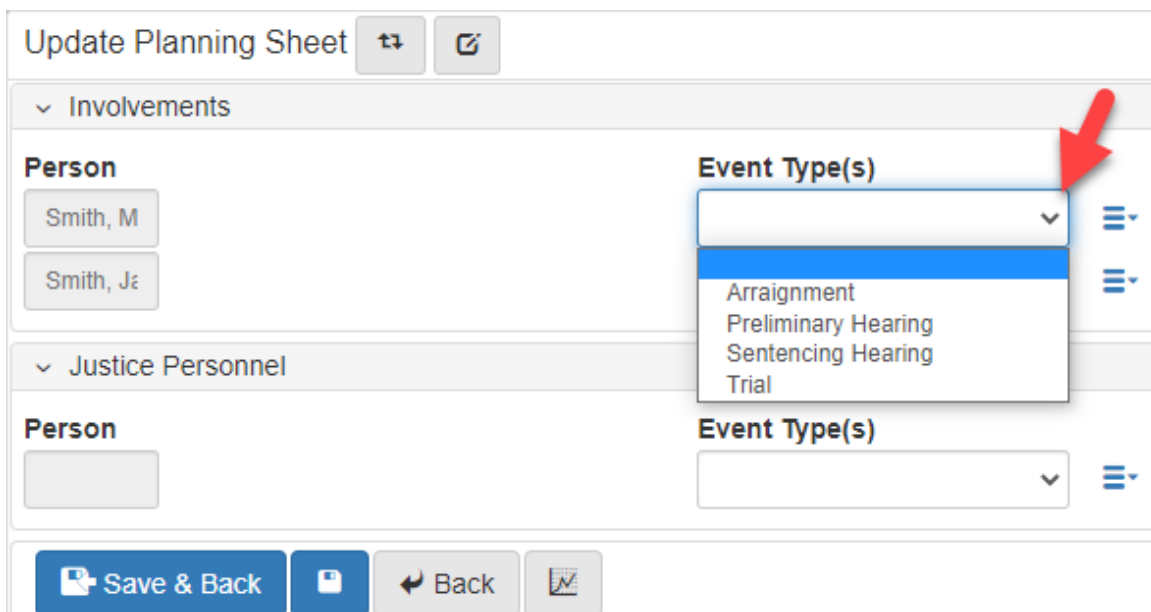
Update planning sheet

1. Start the subpoena process by clicking the Events dropdown arrow, hover over Subpoenas, hover over Subpoena Planning, and click **[Update Planning Sheet]**:

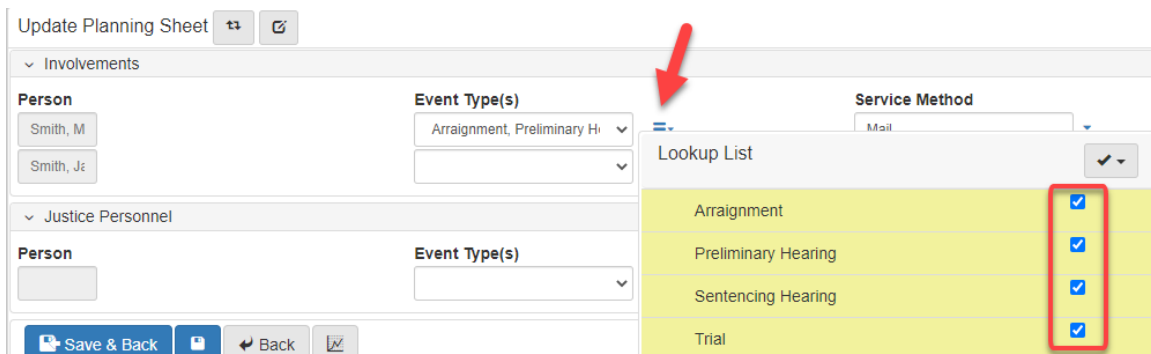


2. On the **Update Planning Sheet** screen, there are two ways to choose an event:



- Use the **Event Types** dropdown. This allows choosing one event.



- Use the lookup list next to **Event Types**. This allows choosing one or many events.



3. Select the **Service Method**:

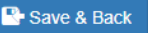



Update Planning Sheet  

▼ Involvements



Person	Event Type(s)	Service Method
Smith, M	<input type="text"/>	<input type="text"/>
Smith, Jc	<input type="text"/>	<input type="text"/>

▼ Justice Personnel

Person	Event Type(s)	Service Method
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Select the **Subpoena Type**:





Update Planning Sheet  

▼ Involvements

Person	Event Type(s)	Service Method	Subpoena Type
Smith, M	<input type="text"/>	<input type="text"/>	<input type="text"/>
Smith, Jc	<input type="text"/>	<input type="text"/>	<input type="text"/>



▼ Justice Personnel

Person	Event Type(s)	Service Method	Subpoena Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Enter a note.

6. When the planning sheet is finished, click [**Save and Back**]:

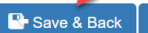



Update Planning Sheet  

▼ Involvements

Person	Event Type(s)	Service Method	Subpoena Type	Note
Smi	Arraignment, Preliminary Hi	<input type="text"/>	<input type="text"/>	<input type="text"/>
Smi	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

▼ Justice Personnel

Person	Event Type(s)	Service Method	Subpoena Type	Note
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Subpoena planning

1. Generate a subpoena by clicking the **Events** dropdown, hovering over **Subpoenas**, then selecting **Subpoena Planning**:

High Profile

Felony ~ 22-1
John Smith
[Open](#)

Summary Case Involvements Victim Charges **Events** File Cabinet Discover

Case Summary [Add Event](#) [Subpoenas](#) [Subpoena Planning](#)

Future Events

2. In the **View Planning Sheet Folder View**, click [**Generate Subpoena**]:

View Planning Sheet [Generate Subpoena](#)

Involvements

Person	Service Type	Subpoena Type	Events
Smith, Jane [WIT]			
Smith, Mary [VIC]	Mail	Subpoena	Sentencing Hearing ✓

3. In the **Generate Subpoena** popup, click the **Event** dropdown:

Generate Subpoena

This will generate a Subpoena for each Person who has the selected Event Type on their Planning Sheet.

Event*

06/30/2022 3:00 PM Courtroom Assignment

Generate missing

[Close](#) [Generate](#)

4. Select the event for the Subpoena:

Generate Subpoena x

This will generate a Subpoena for each Person who has the selected Event Type on their Planning Sheet.

Event*

06/30/2022 3:00 PM Courtroom Assignment

Generate missing

Close **Generate**

5. Click [**Generate**]:

Generate Subpoena x

This will generate a Subpoena for each Person who has the selected Event Type on their Planning Sheet.

Event*

06/30/2022 3:00 PM Courtroom Assignment

Generate missing

Close **Generate**

Subpoenas future and past events

You can also generate a subpoena by clicking the Events dropdown arrow then clicking the [**Subpoenas**] button:

High Profile

Felony ~ 22-1

John Smith

Open

Summary Case Involvements Victim Charges Events File Cabinet

Case Summary

Future Events

Add Event

Subpoenas

1. Select the events that need subpoenas generated.

2. Select the parties that need to be served.
3. Select the assignments that need to be served.
4. Click [**Generate Subpoenas**]:

Subpoenas

Future Events
1
All Events ▼

06/30/22 3:55 PM Preliminary Hearing in Courtroom 1

<input type="checkbox"/>	Parties	Served
<input type="checkbox"/>	Smith, Jane [WIT]	
<input type="checkbox"/>	Smith, Mary [VIC]	
<input type="checkbox"/>	Assignments	Served

06/22/22 10:00 AM Sentencing Hearing in Courtroom 1

<input type="checkbox"/>	Parties	Served
<input type="checkbox"/>	Smith, Jane [WIT]	
<input type="checkbox"/>	Smith, Mary [VIC]	
<input type="checkbox"/>	Assignments	Served

4
Generate Subpoenas
← Back

Scroll to top

VOCA reporting

Add VOCA report items

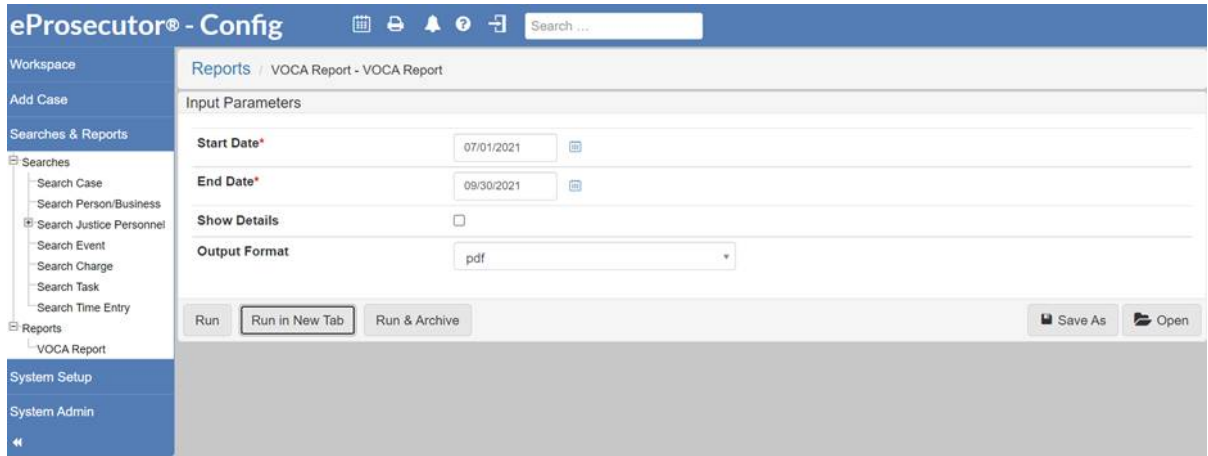
The Federal Victims of Crime Act Report (VOCA) includes victimizations, special classifications, and services. Adding these items are found in the **Victim** dropdown in a case. The added items are viewable from the **Victim Folder View**:

The screenshot shows the eProsecutor Config interface. The main case view is for 'Felony ~ 21-5 Charlie Buck'. The 'Victim' dropdown menu is open, showing options: 'Add Victimization', 'Add Special Classification', and 'Add Service'. The 'Victimization Type' is set to 'Kidnapping (custodial)' and the 'Date Reported' is '09/14/2021'. The interface includes a sidebar with 'Recent Cases' and a top navigation bar with various tabs like 'Summary', 'Case Involvements', 'Victim', 'Charges', 'Events', 'File Cabinet', 'Discovery', 'Financials', 'Investigation', and 'Tasks'.

Generate the VOCA report

To generate the VOCA report:

1. Navigate to **Left navigation > Searches & Reports > Reports > VOCA Report**.
2. Enter the time-period and the output format.
3. If **Show Details** is selected, links for case and person records are inserted into the report:



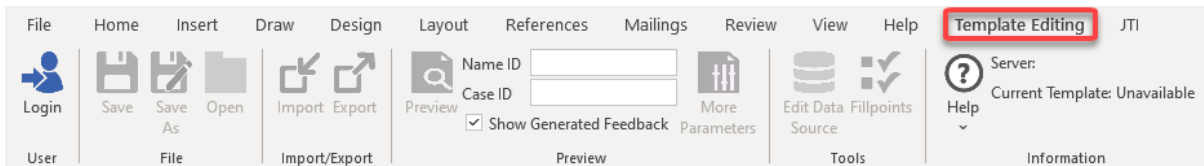
The following is an example VOCA report:

VOCA Report	
Date Reported between 07/01/2021 and 09/30/2021	
<u>I. Population Demographics</u>	
TOTAL number of individuals who received services during the reporting period	3
Race/Ethnicity	
Black/African American	0
White Non-Latino/Caucasian	1
Asian	0
American Indian/Alaska Native	0
Native Hawaiian and Other Pacific Islander	0
Some Other Race	0
Hispanic or Latino	0
Multiple Races	0
Not Reported	2
Gender Identity	
Male	1

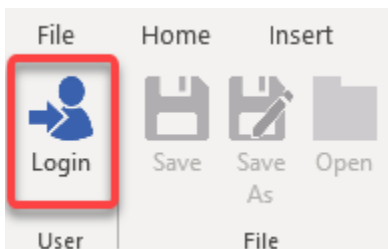
4. JDA documentation

Login process

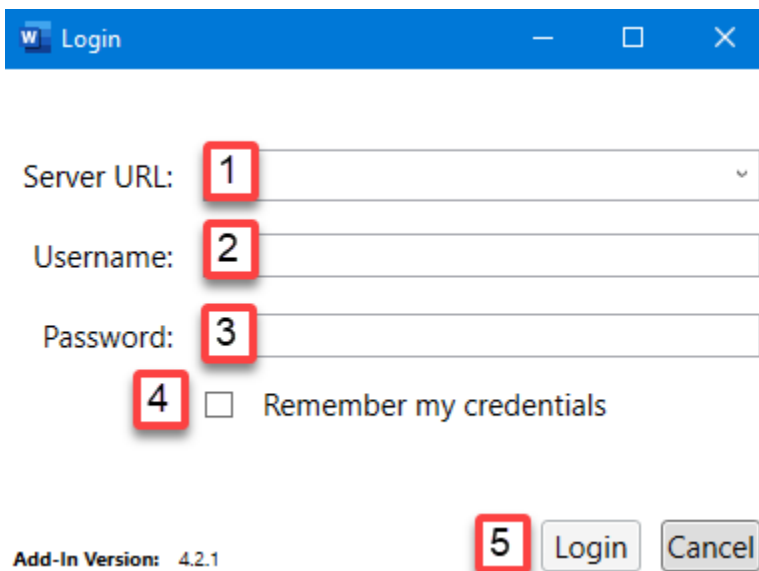
1. To access your JDA documentation, open Microsoft Word and click the Template Editing Menu.



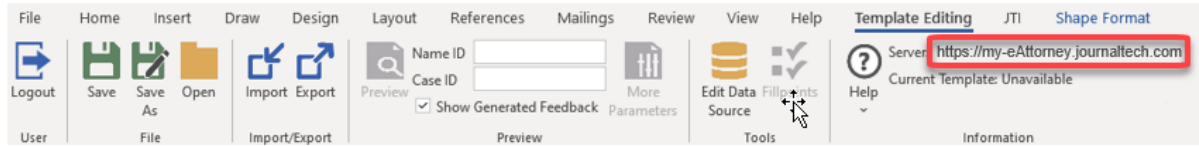
2. Select **Login**.



3. In the JDA Login dialog box, enter the Server URL, your username, and your password. To have your credentials saved, select [**Remember my credentials**]. Then select [**Login**].

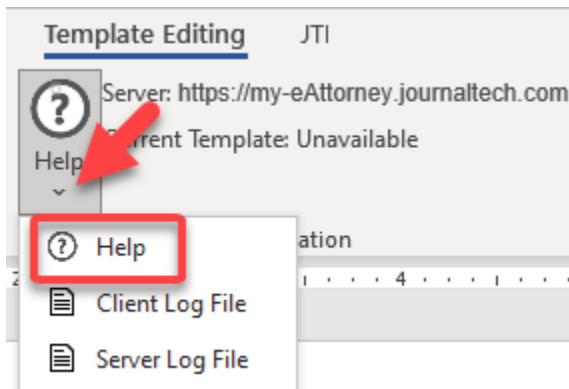


4. After you complete the login process, your server URL is included in the Template Editing ribbon.



Accessing JDA help documentation

1. To access the JDA Help Documentation, select the drop down arrow under Help and then select the Help option.



2. The JDA documentation web site opens in your browser. This documentation covers several topics:

- JDA Documentation
 - JDA Website
 - Initial Login
 - Administrators
 - Users
 - Add-In User Interface
 - Template and Group Management
 - Importing and Exporting
 - Preview
 - Parameters
 - Datasource Window
 - Fillpoints Task Pane
 - Log Files
 - Language Features
 - ForEach and Nested Looping
 - If Else Branching
 - Variables
 - Comments
 - Math
 - Date and Time Formatting
 - Subdocuments
 - Dialogs
 - Types of Dialogs
 - Parameters Dialog
 - Custom Dialog
 - Choose Dialog
 - ChooseSome Dialog
 - Troubleshooting



JDA Documentation

JDA Website

Initial Login

After installing JDA, you will need to login to the JDA

- **Username:** admin
- **Password:** adminpass

Note: You will be required to change the password

After logging in as the admin, navigate to **Admin** ->

Administrators

User Management

The user management section, under admin drop-

- **Create User** - Creates new user.
- **Delete Existing User** - Deletes selected user.
- **Reset Password** - Resets the password of a :
- **Change Roles** - Grant/remove user administr

