eAttorney documentation

2024-09-23

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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

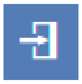
eAttorney is a web app that is securely managed by Journal Technologies in the AWS GovCloud. The web app can be accessed from computers (PC or Mac), smartphones (iPhone, Android) and mobile devices (such as iPad, Galaxy, Surface). Users only need a web browser to securely access the system.

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 **[Login]** 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

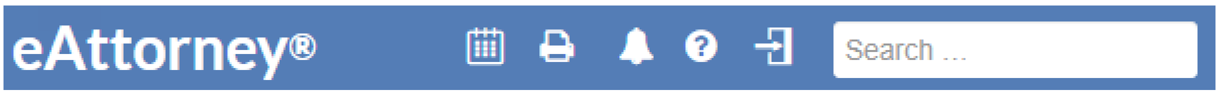
Top navigation

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:

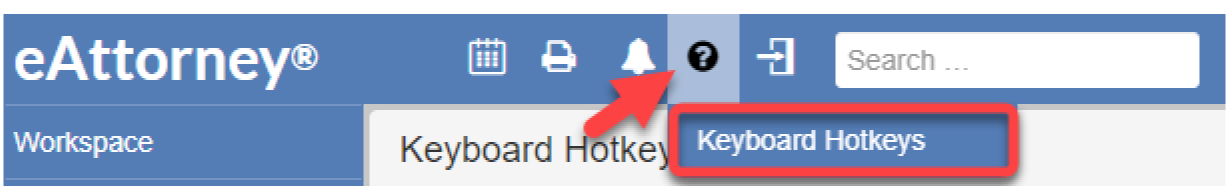


Available actions and short descriptions:

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 + C	⌥ + C	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 + ⇧ + '		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

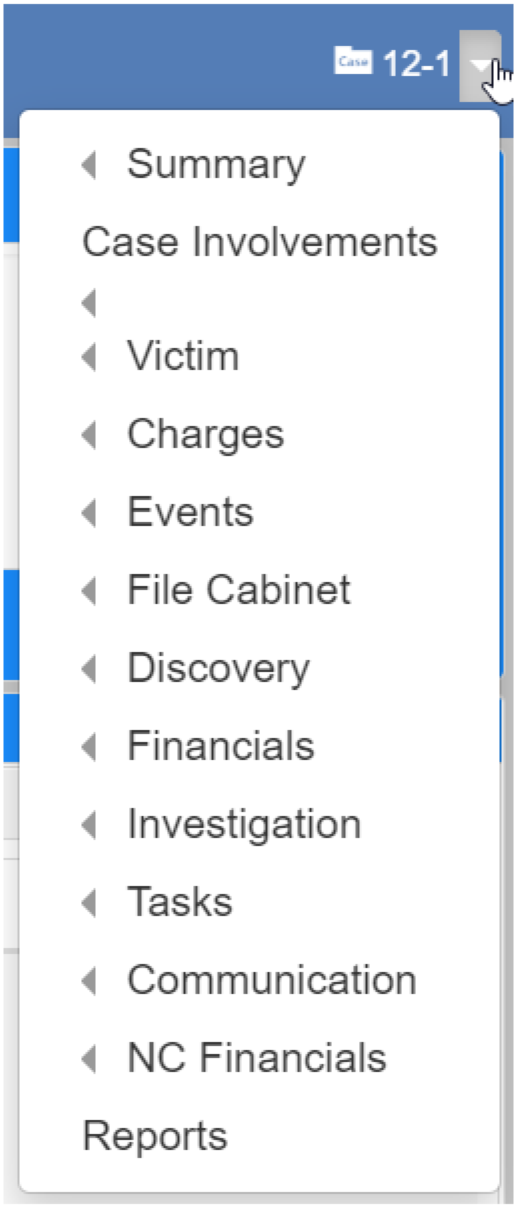
Windows	Mac	Description
Ctrl + F12		On the entities screen, open a global search popup for entities, fields, or lookup lists.
Alt + 0 (zero)	⌥ + 0 (zero)	Opens the form editor.

Right side

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

Click the CaseId 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.

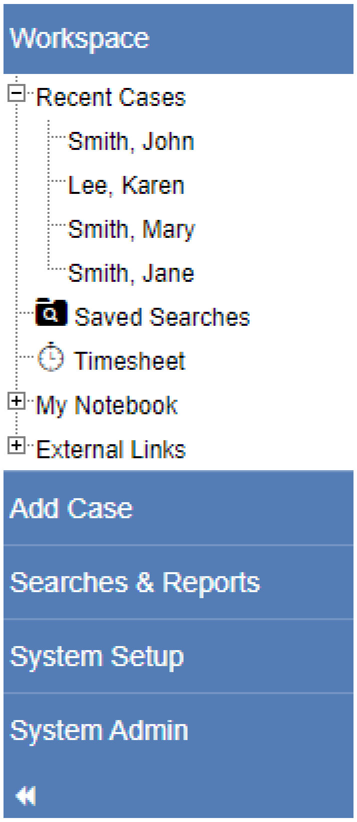
Left navigation

Different Security Groups affect what the user sees in the left navigation pane. For more information, see User navigation.

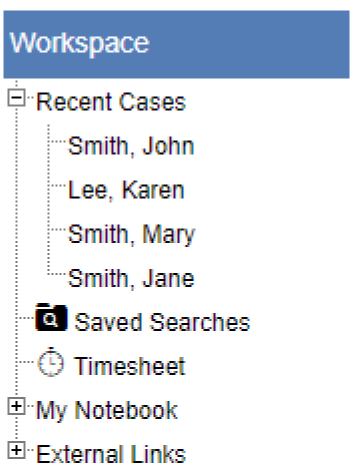
Click a link for more information about the item.

Sections

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



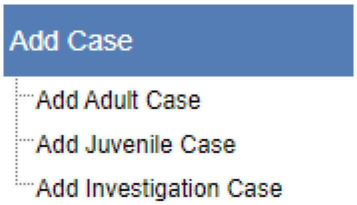
Workspace



- `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.

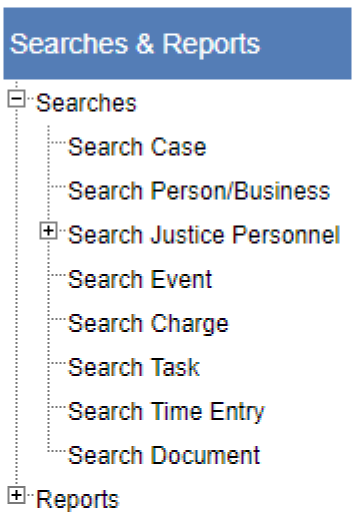
- `My Notebook` - Manage your notes and Shared Notes.
    - `Note Snippets / Macros` - Text Snippets for fast data entry or writing prompts.

Add case



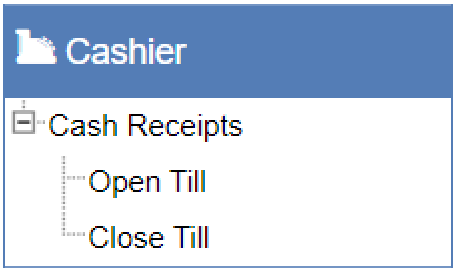
- Add Adult Case - Go to the case creation screen. See Create a case.

Searches and reports



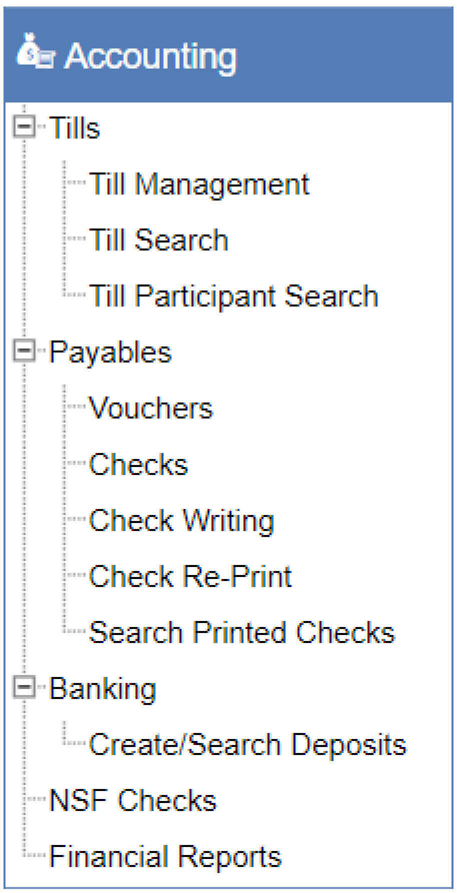
- Search case - Search for cases.
- Search person/business - Search for a Person or Business.
- Search justice personnel - Search for Justice Personnel.
    - Search justice personnel caseload - Search for Justice Personnel Caseload.
- Search scheduled event - Search for Scheduled Events.
- VOCA report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

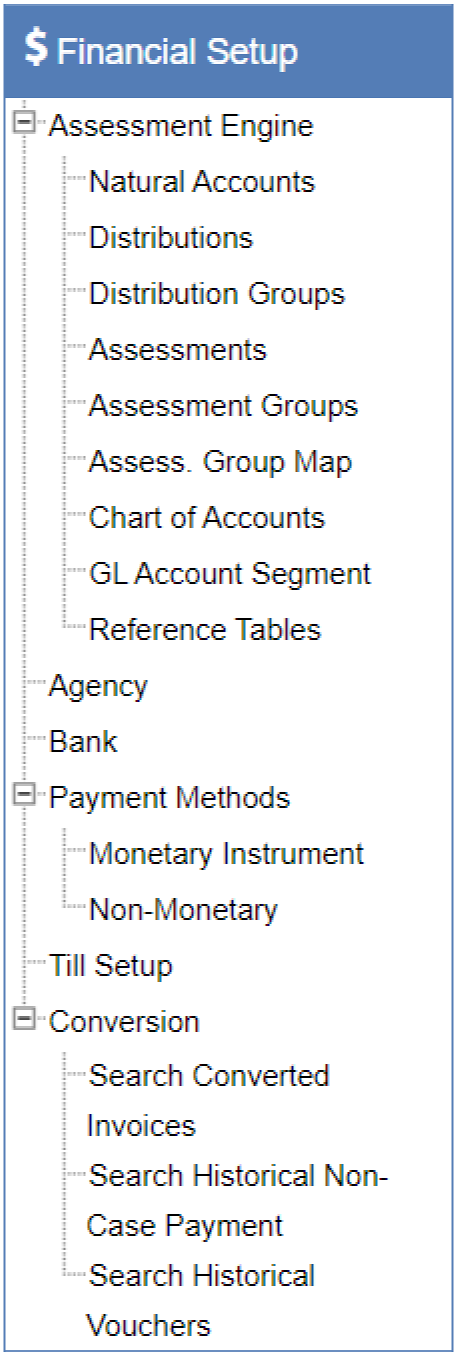
Accounting



- 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.

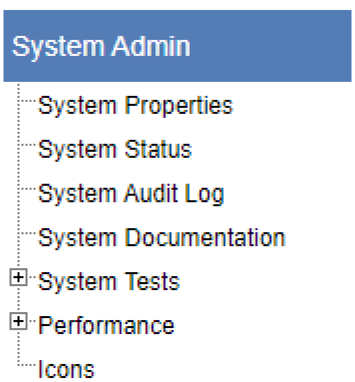
Financial setup



- 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.

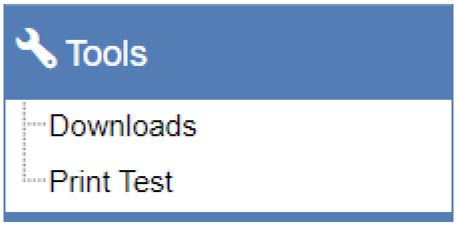
System administration



- 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.

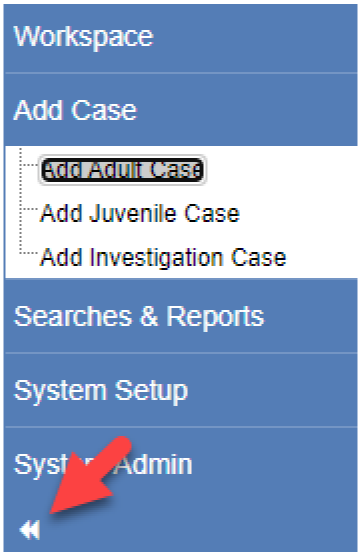
    - Search Statute Text - Search for statute text.
- News gadget configuration - Manage content for the News Gadget on the Dashboard.
- Managing special statuses - Manage Case and Person Special Statuses.
- Calendar administration - Manage Holidays and Test Calendar Sync.
    - Holiday Calendar - Manage 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



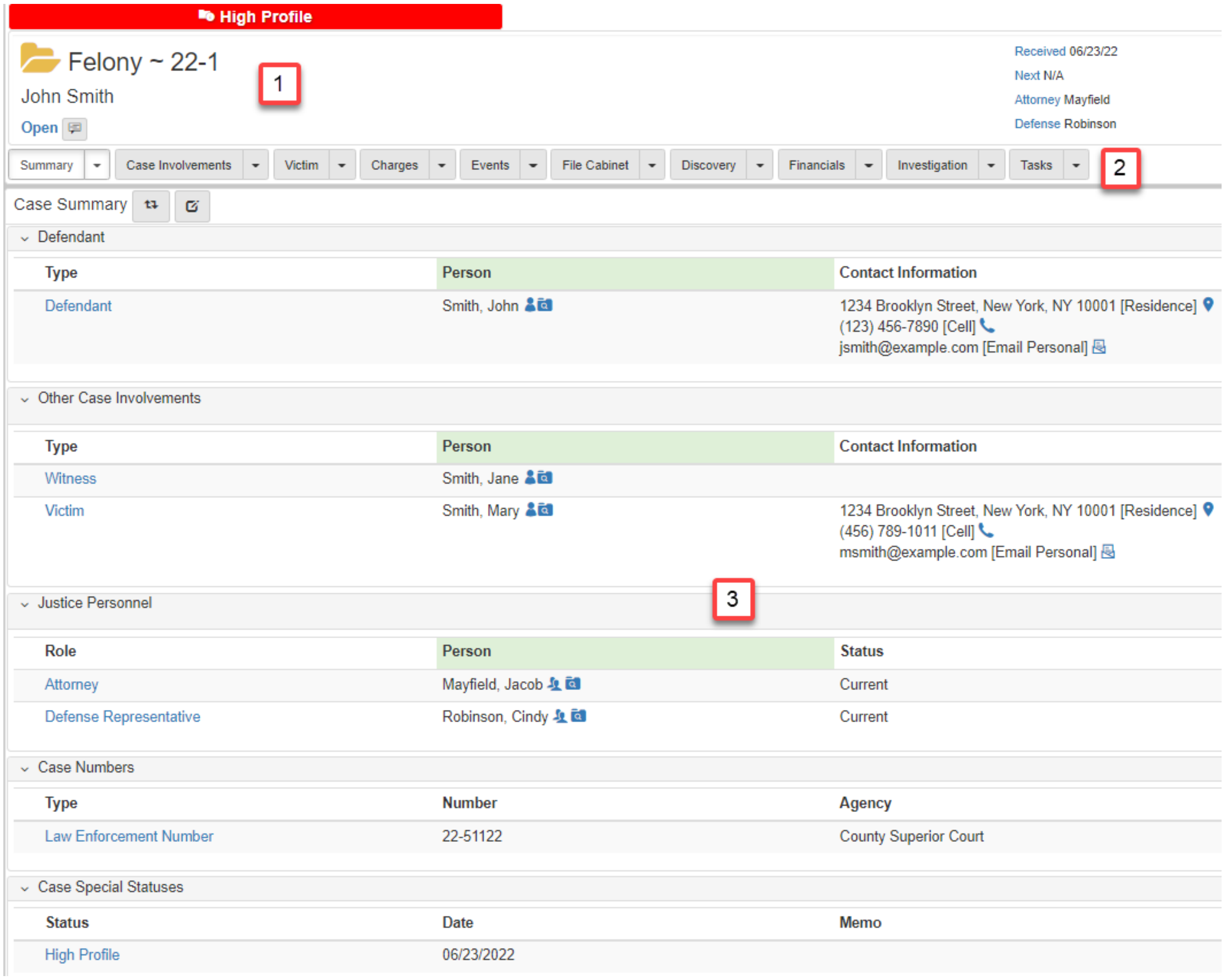
Hide the Left Navigation Bar for greater screen size.

Case navigation

A **Case Navigation** screen:

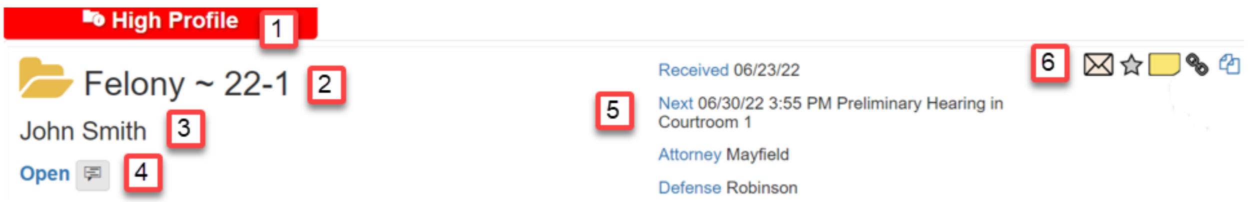
1. A header.

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



Header

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

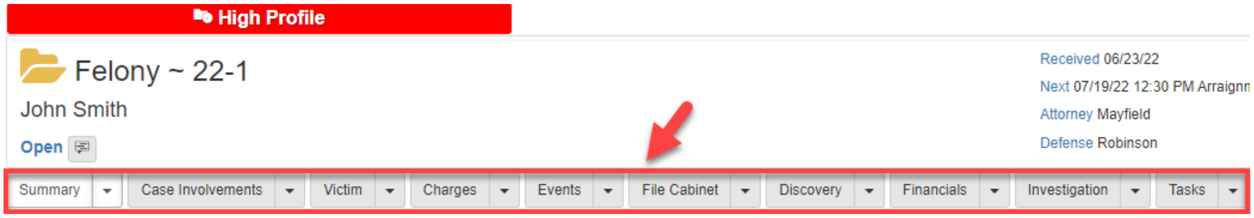


1. The **Special Status Banner** shows if there is a special status on the case being viewed.
2. The **Financials Banner** shows if there is a balance on the case.

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

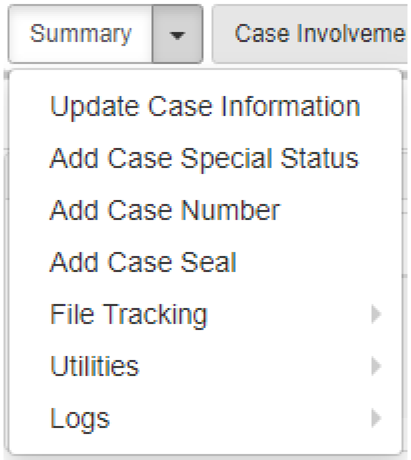
Under the header is a row of buttons. Each button, when clicked, changes the data shown in the page Case Folder View. Most of the buttons have a dropdown beside it. The dropdown has a list of options to add or update data on the case.



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

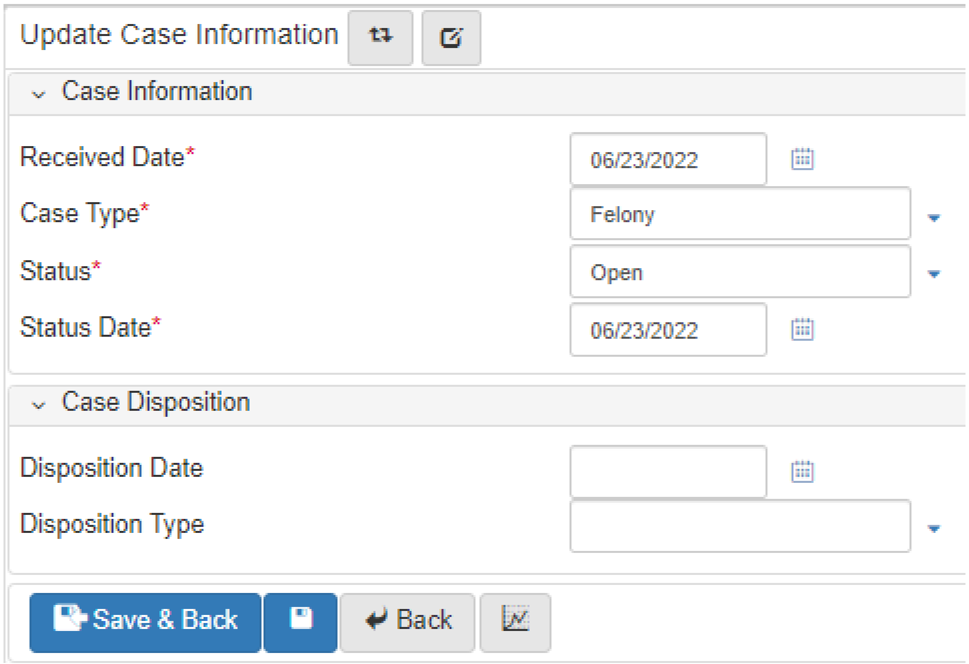


The **Summary** dropdown has options to update case information, add a special status or case number, or join cases.

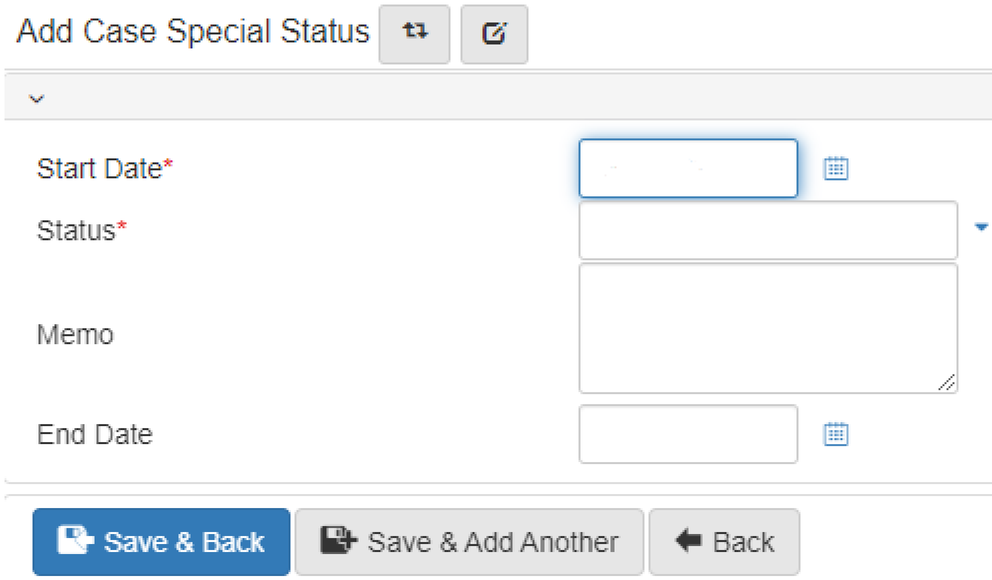
- Select **Update Case Information** to update the received date of the case, the case type, the case status, and the status date.

  NOTE

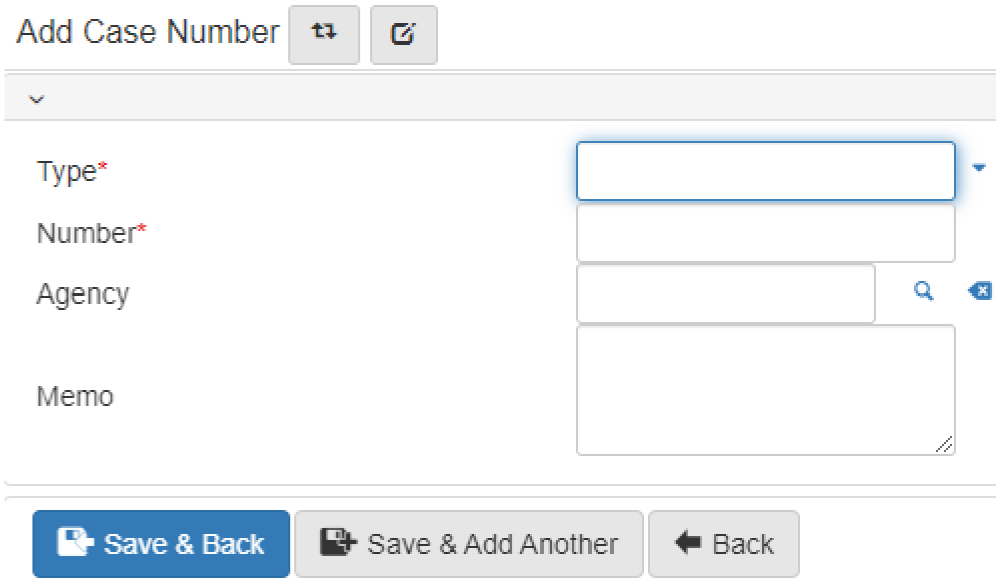
  All fields on this form are required for submission.

- 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.



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



- 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

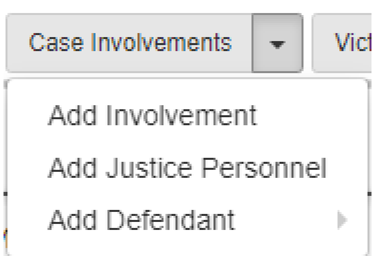
a. The **Case Joinders** panel shows **Joinders** associated with the case. A red icon shows next to the **Joinder** main case and a blue icon shows beside the current case.

b. Click a **Joinder** link to edit the **Joinder** fields, **Name**, **Joinder Type**, **Description**, and **Purpose**.

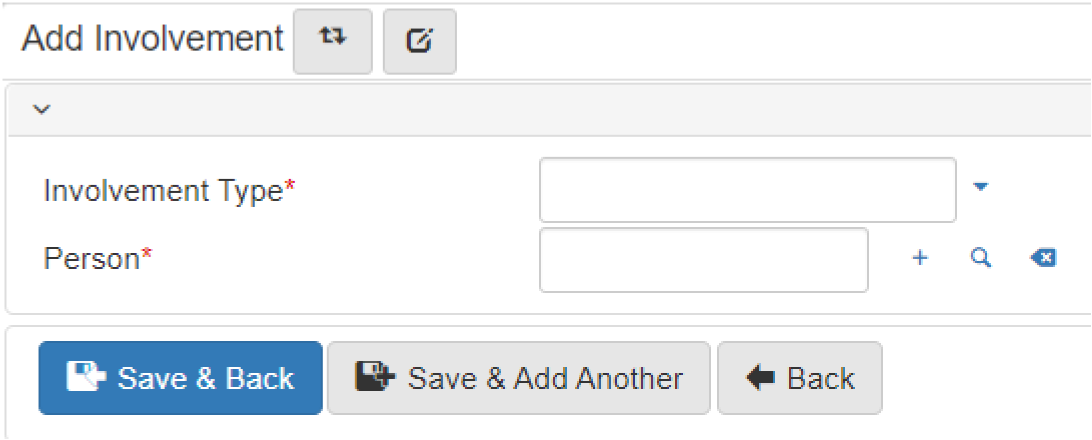
c. The **Add Case Joinder** panel creates a new **Case Joinder** associated with the selected case.

d. Click **[Add Case]** to open a Search case popup.

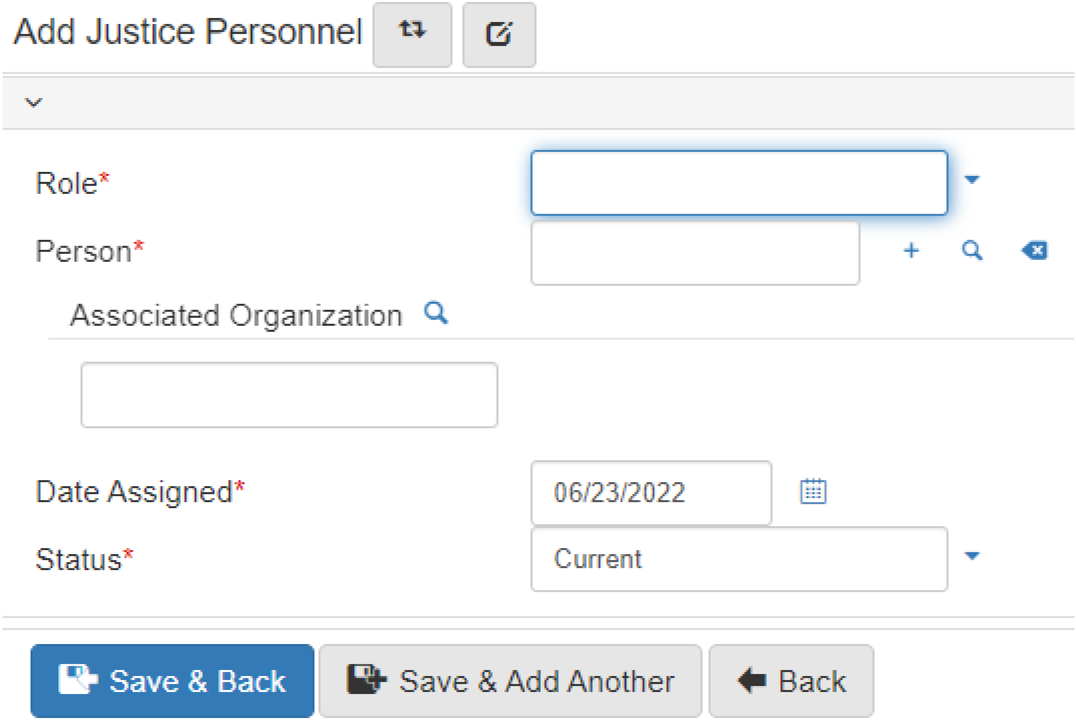
Case involvement [https://documentation.journaltech.com/eAttorney/user/cases/involvements.html]



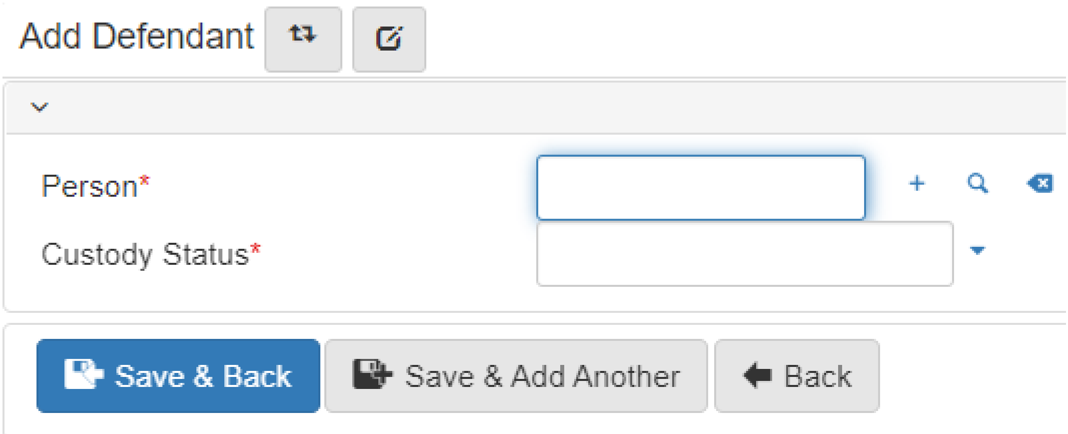
- Select **Add Involvement** to add an existing/new person and involvement type, including **Complainant**, **Witness**, or **Victim**, to the selected case.



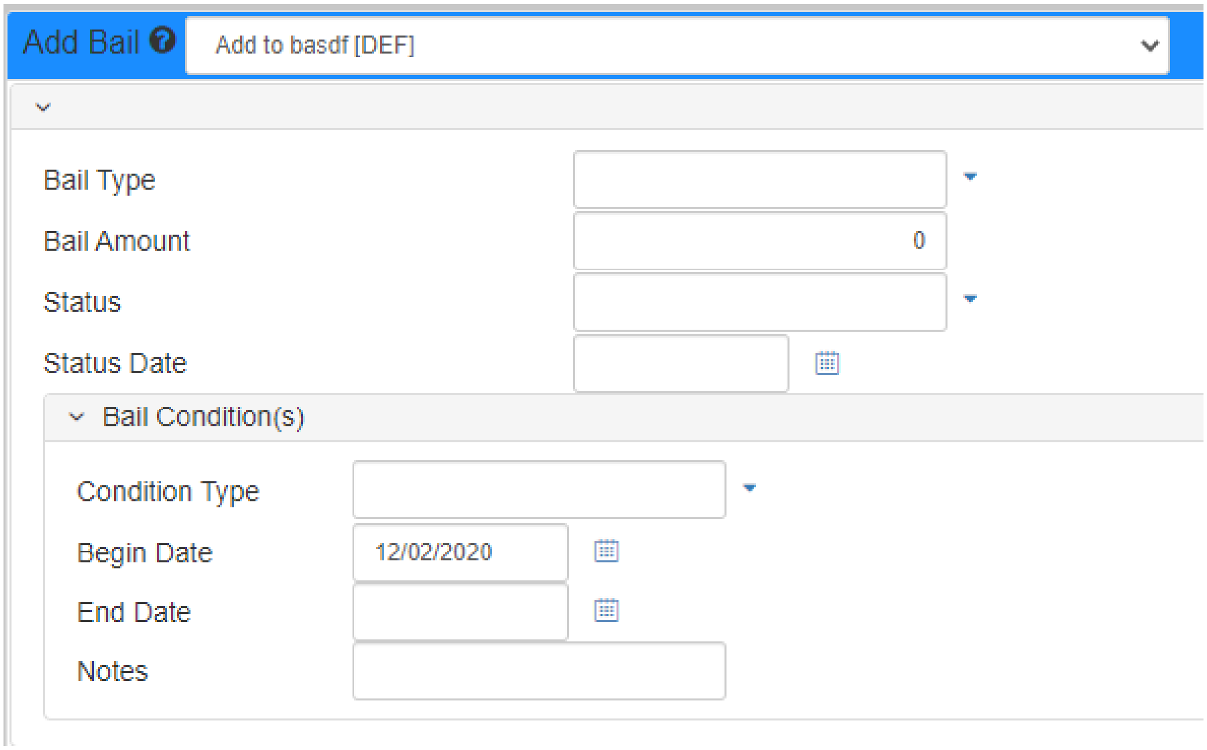
- Select **Add Justice Personnel** to add the case to the **My Recent Cases** gadget for the corresponding justice personnel.



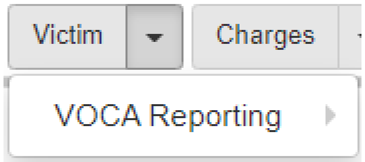
- Select **Add Defendant** to create a subcase and a party to the case. The subcase is added to aid financials.



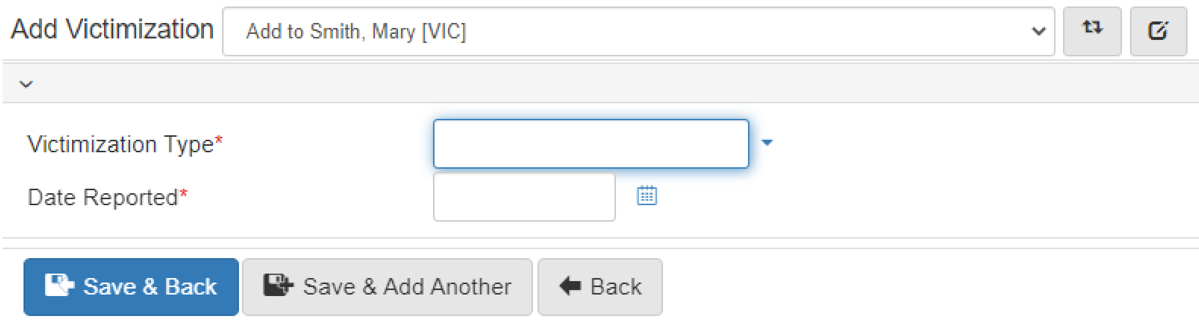
- Select **Add Bail** to add **Bail** information and conditions for the selected case involvement.



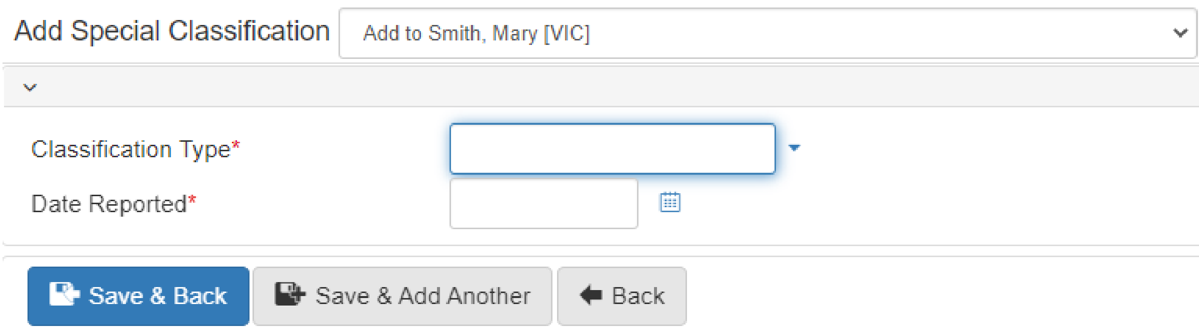
Victim and VOCA reporting



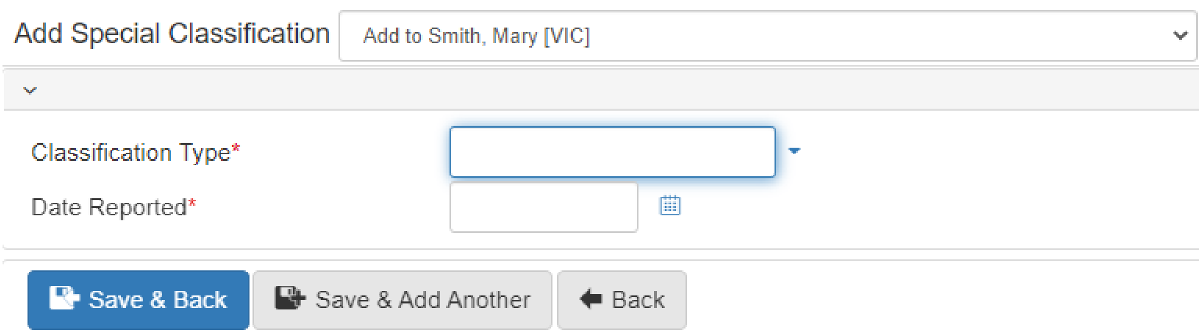
- Select **Add Victimization** to add a victimization type to a victim. Adding a victimization type requires a victim in **Case Involvements**.



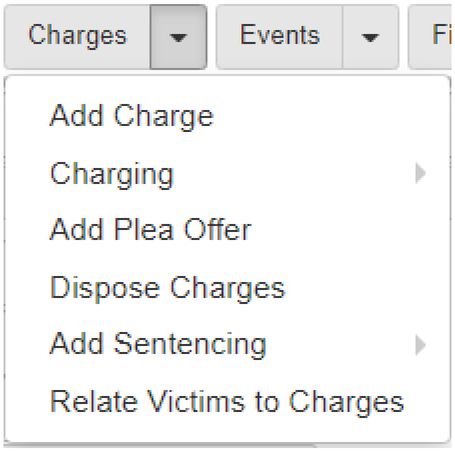
- Select **Add Special Classification** to add a special classification for a victim. The special classifications are used in VOCA reports.



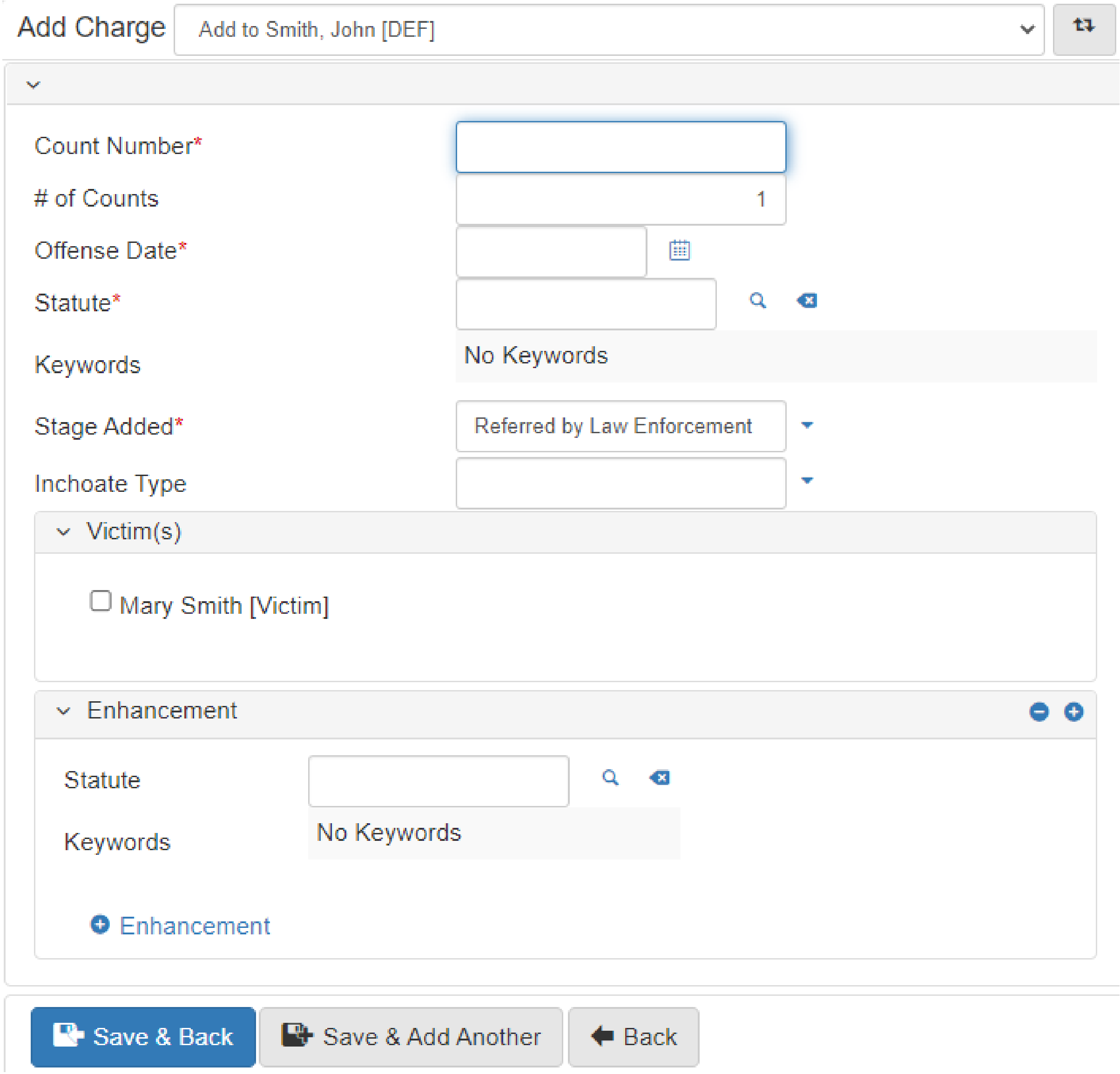
- Select **Add Service** to record a service provided to a victim. The services show in VOCA reports.



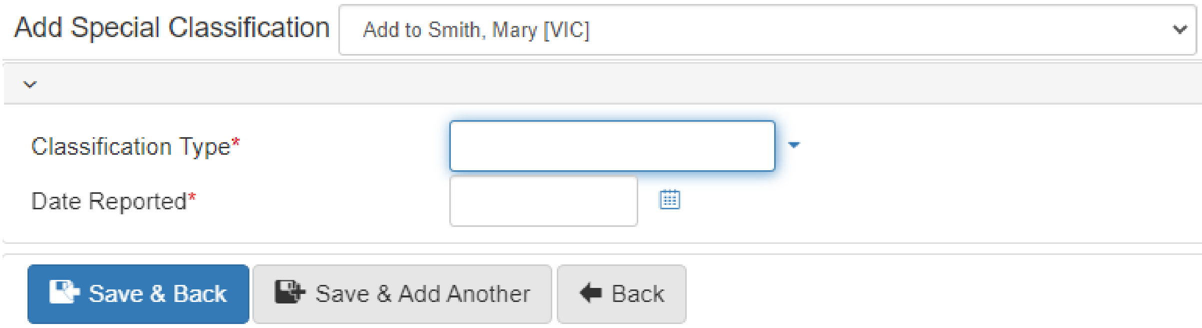
Charges



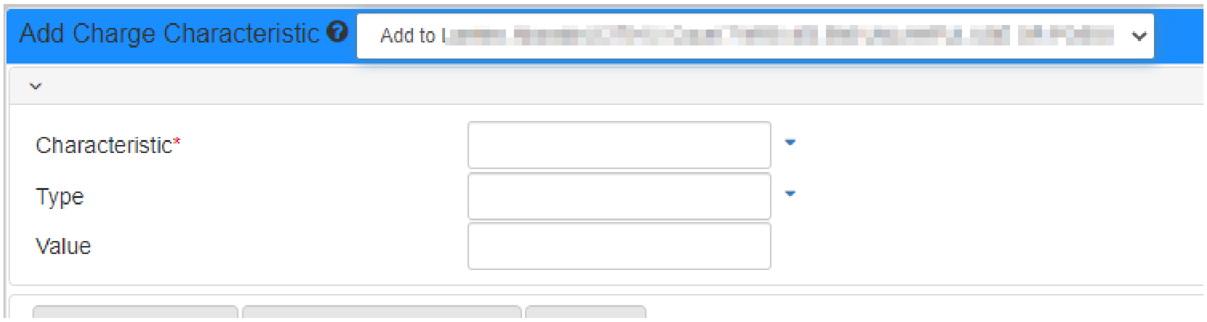
- Select **Add Charges** to add charge information to the involvement.



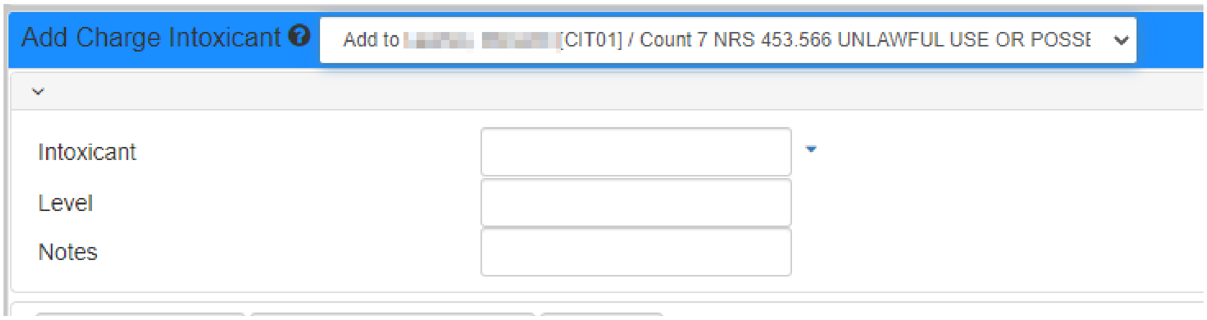
- Select **Add Plea Offer** to add plea offer information to the involvement.



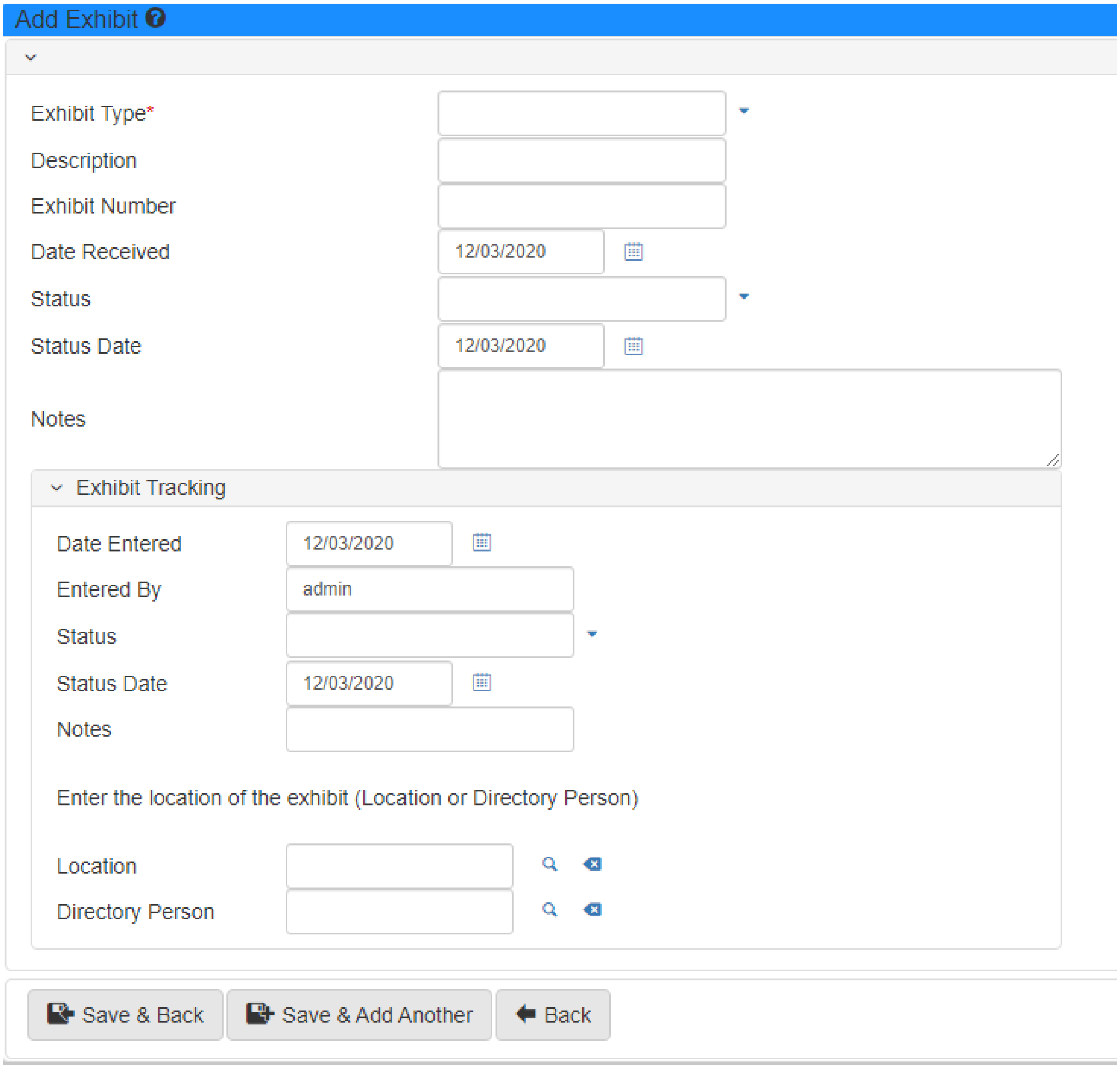
- Select **Add Charge Characteristic** to add a **Case** charge characteristic, like **Misdemeanor** or **Felony**.



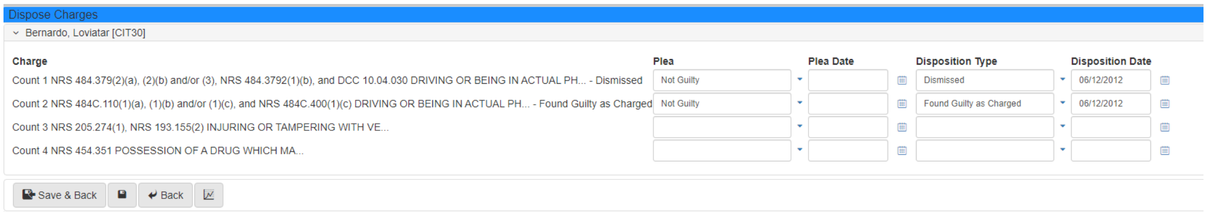
- Select **Add Charge Intoxicant** to add an intoxicant to the selected individual.



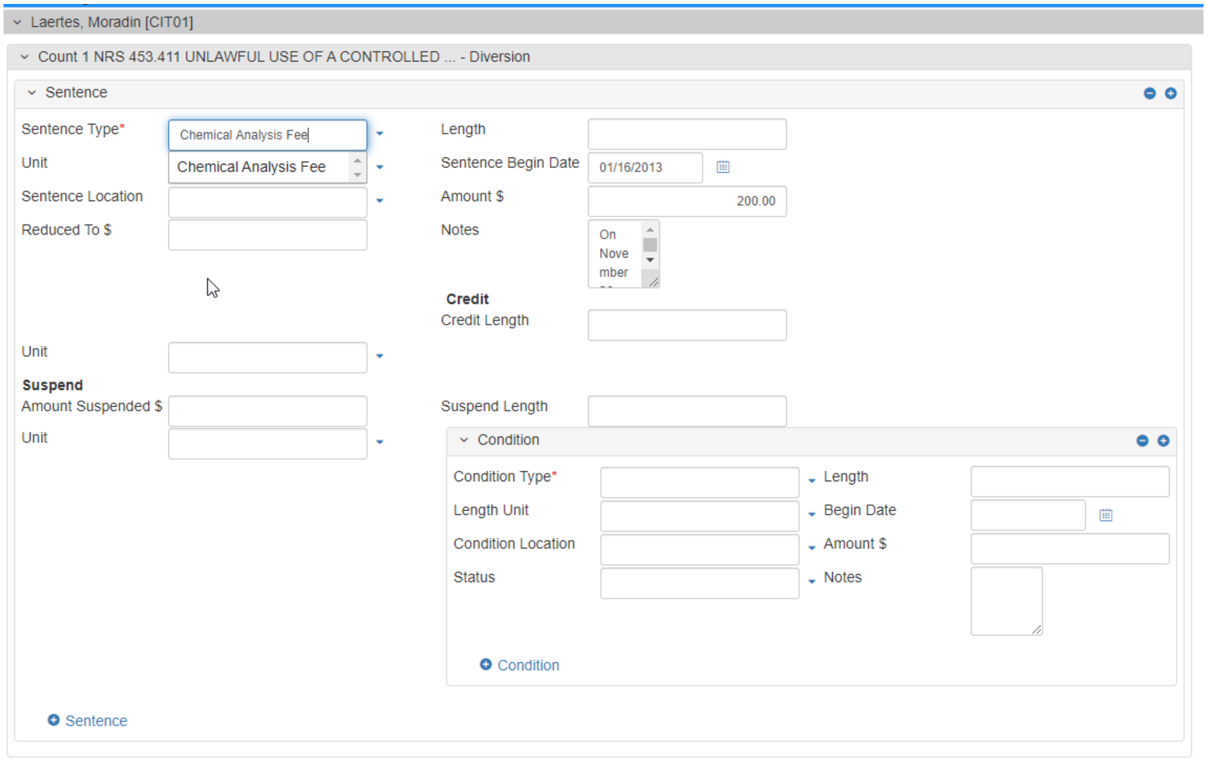
- Select **Add Exhibit** to document and track history.



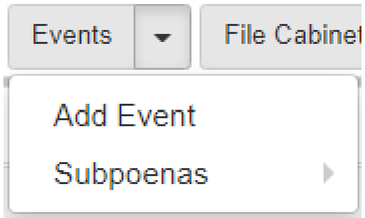
- Select **Dispose Charges** to dispose charges. Select the **Plea** and **Disposition Type** for each charge to dispose.



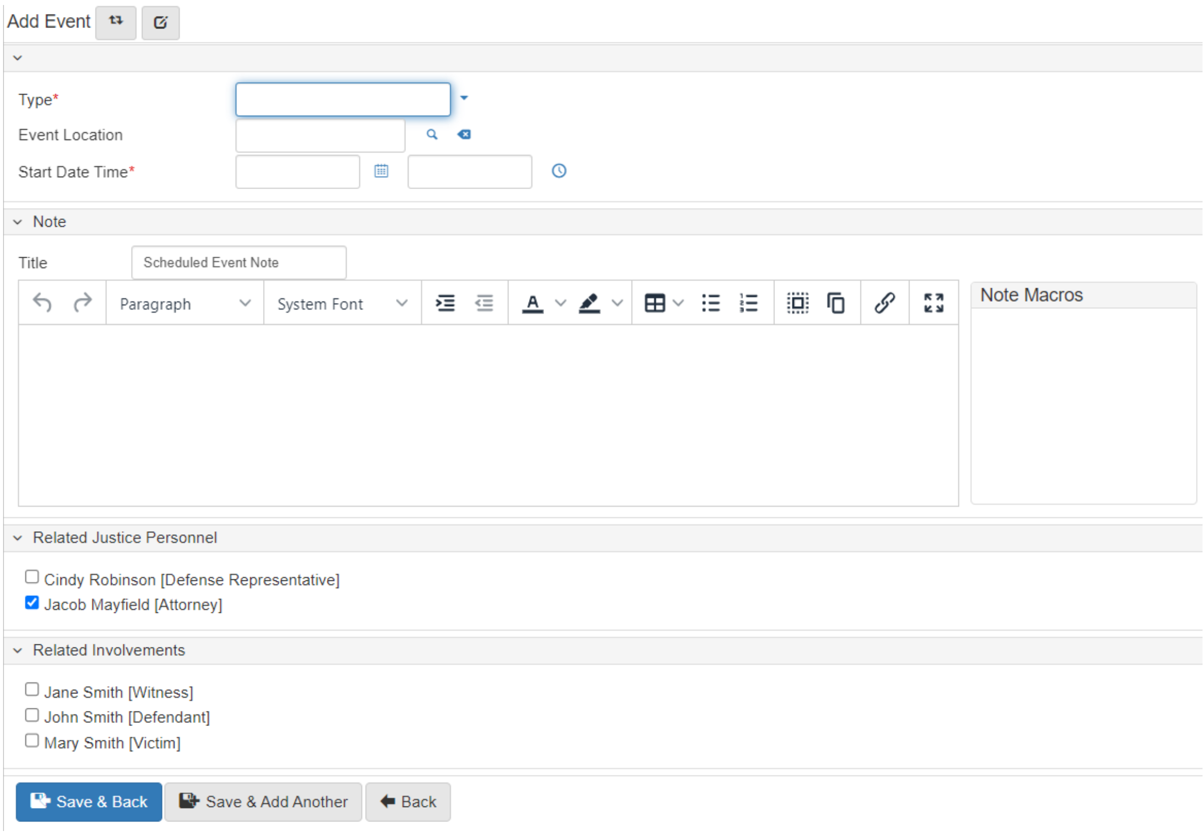
- Select **Sentencing** to add a sentence to a charge, organized by count.



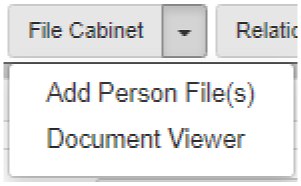
Events



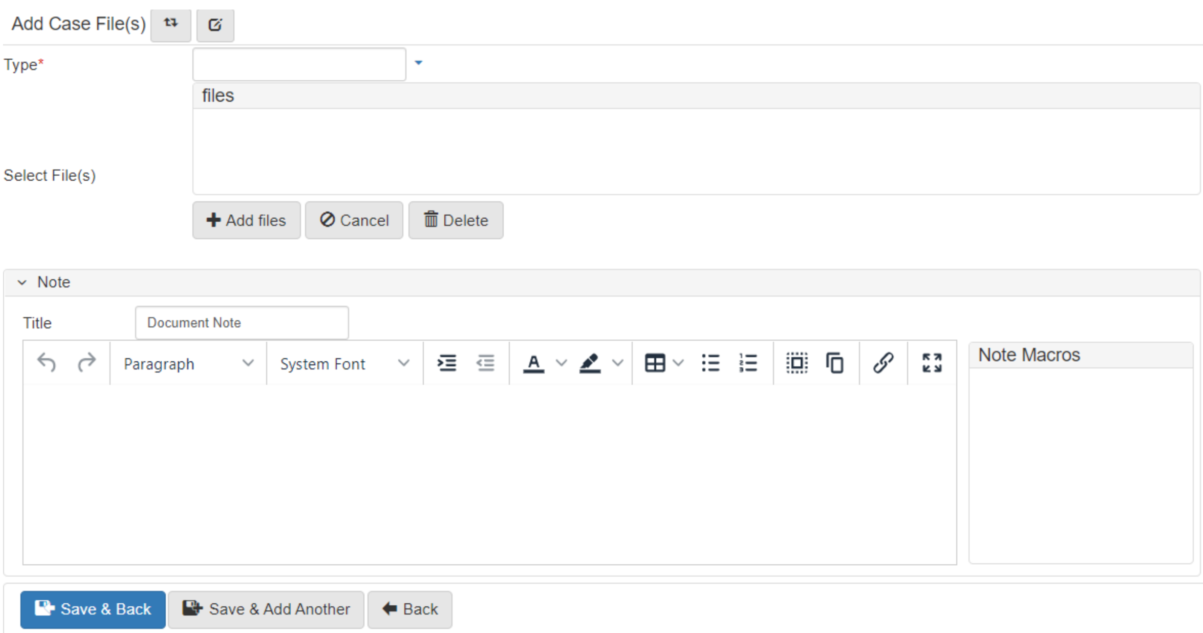
- Select **Add Event** to add a scheduled event, like a hearing, conference, or meeting, with related **Involvements** or **Case Personnel**.



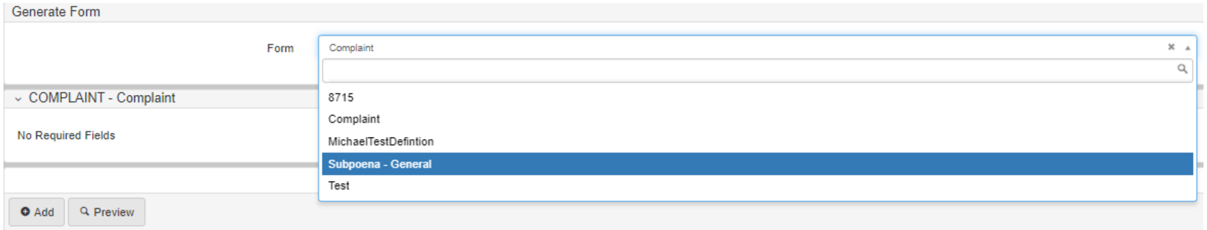
File cabinet



- 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.

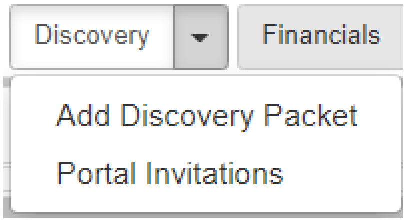


- Select **Generate template** to generate a document from a template.

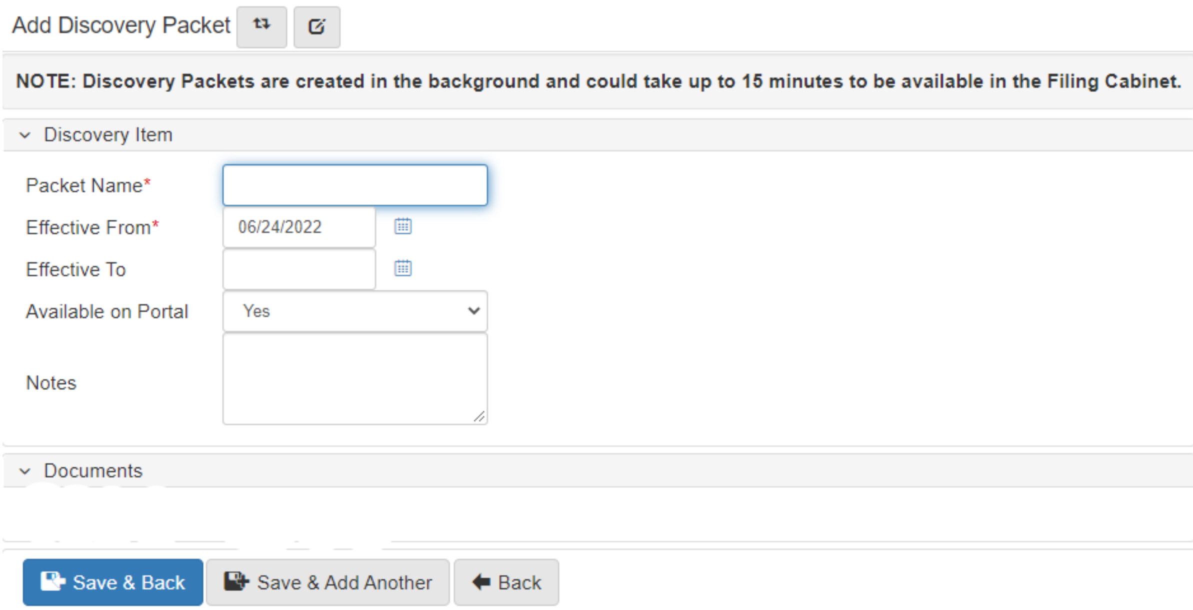


- Select **Utilities** to access these utilities:
    - Select **Bates Stamp** to apply a stamp to a document.
    - Select **Merge Documents** to merge documents in the **Filing Cabinet** into a single PDF.
- Select **Doc Viewer** to use the Document viewer to show a **Case** document, annotate it,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

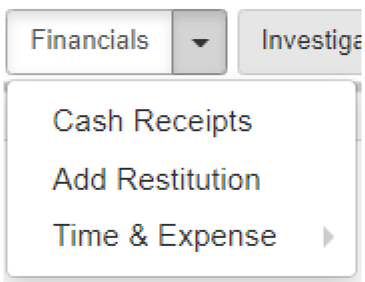
Discovery



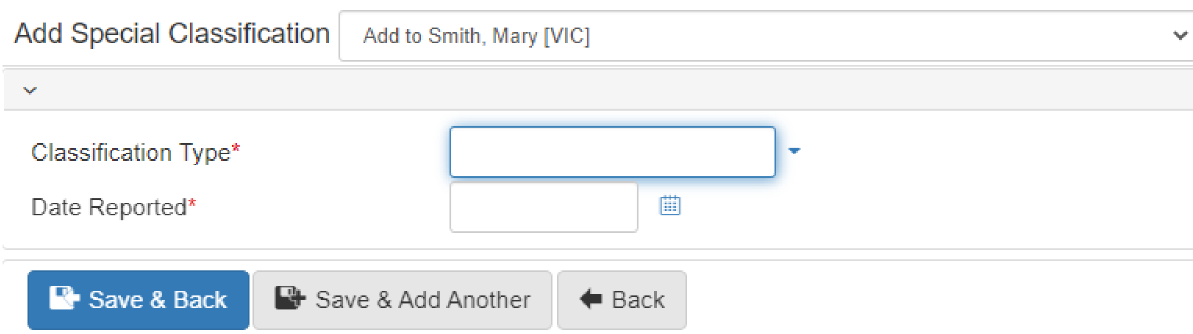
- Select **Add Discovery Packet** to add documents to a packet that can be shared for some time. Learn more about Discovery Packets and how to create them.



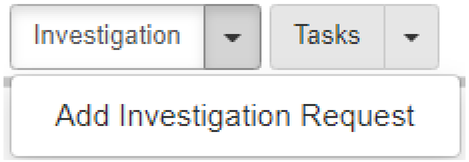
Financials



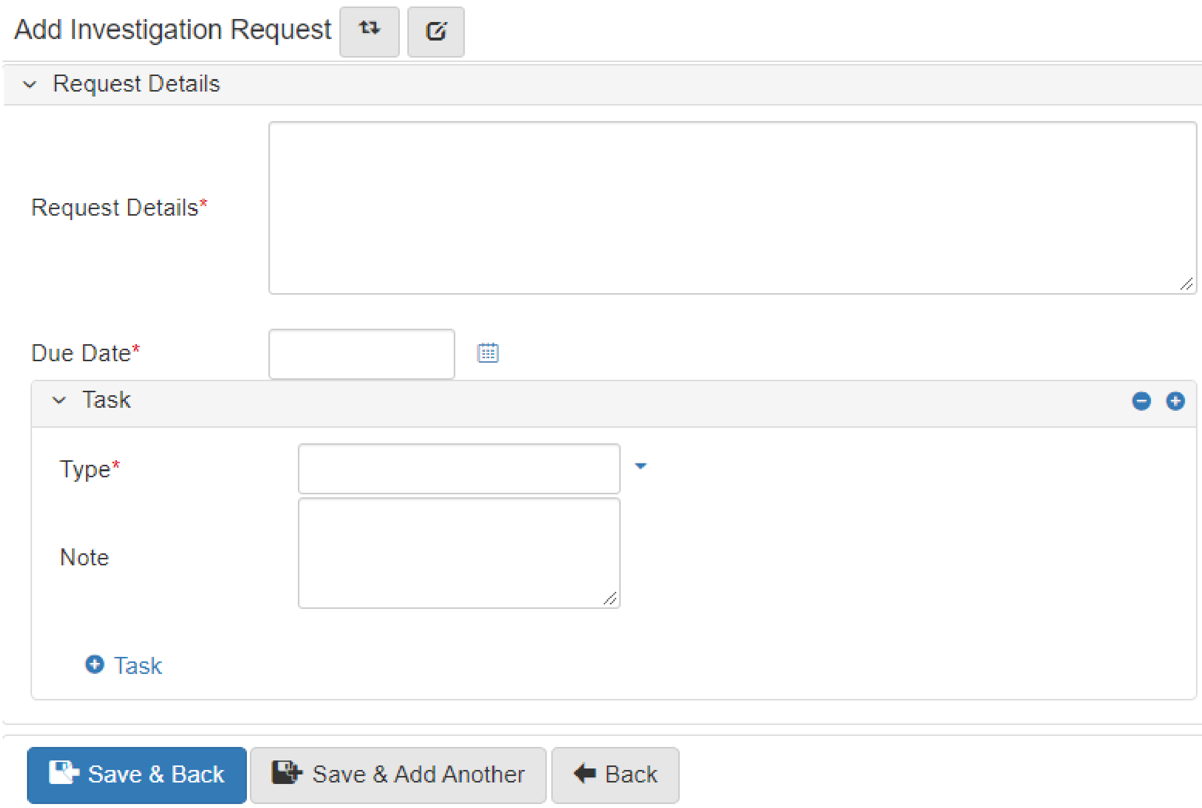
- Select **Cash Receipts** to manage the **Case** Cash Receipts.
- Select **Case Ledger** to review the Case Ledger.



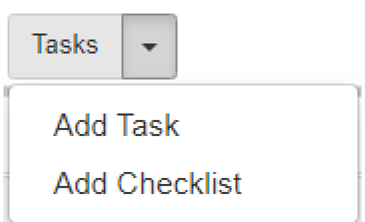
Investigation



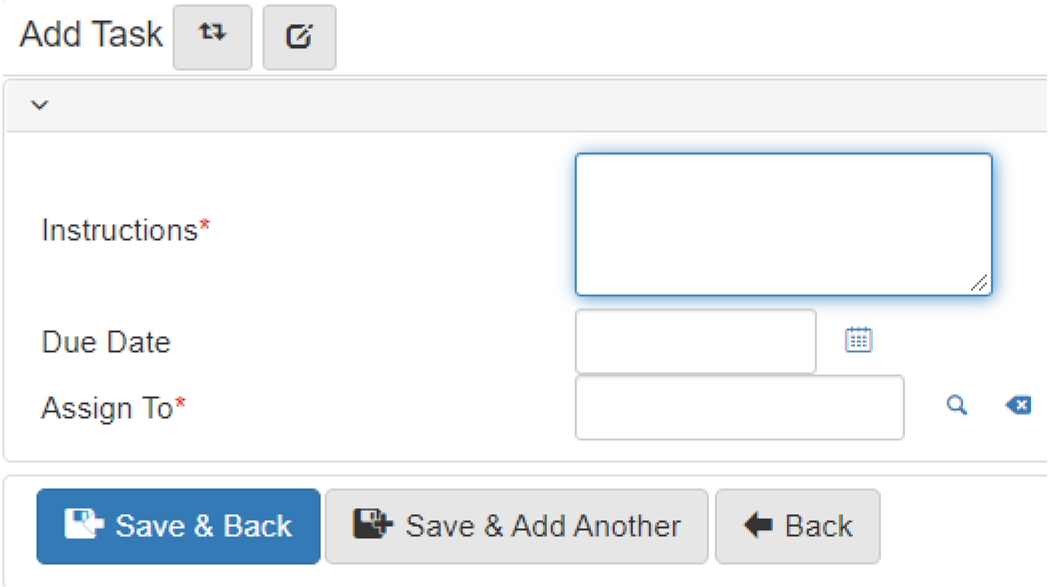
- Select **Add Investigative Request** to add an investigative request to the **Case**.



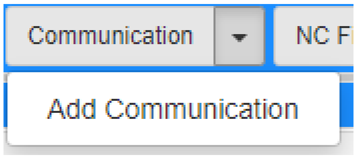
Tasks



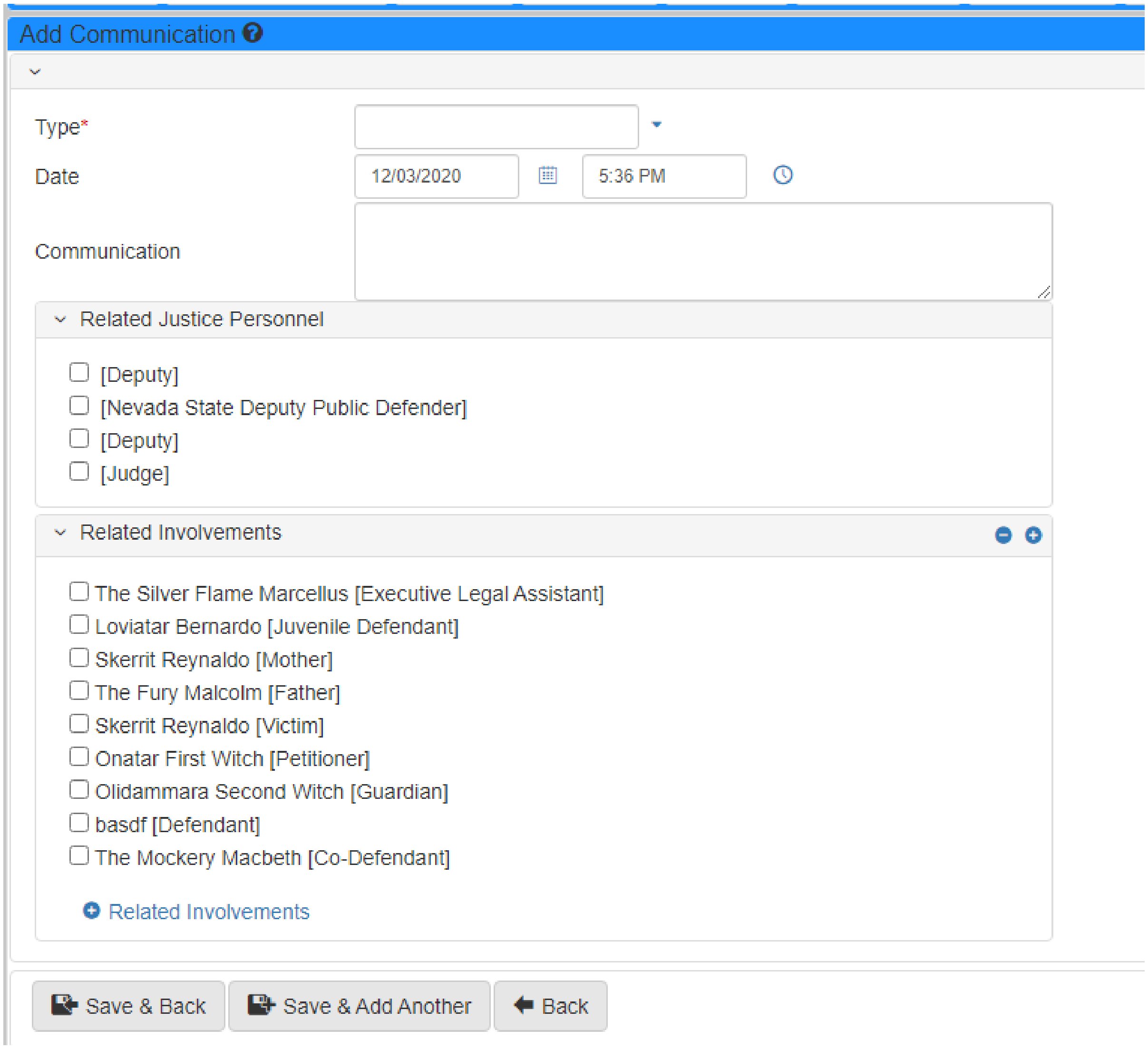
- Select **Add Case Task** to add a task to the **Case**. Case tasks show in the manual work queue for individuals added to the **Assign To** field.



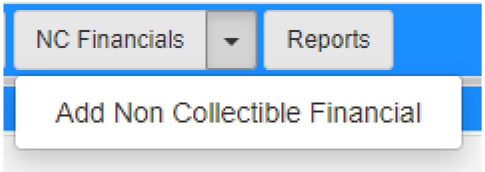
Communication



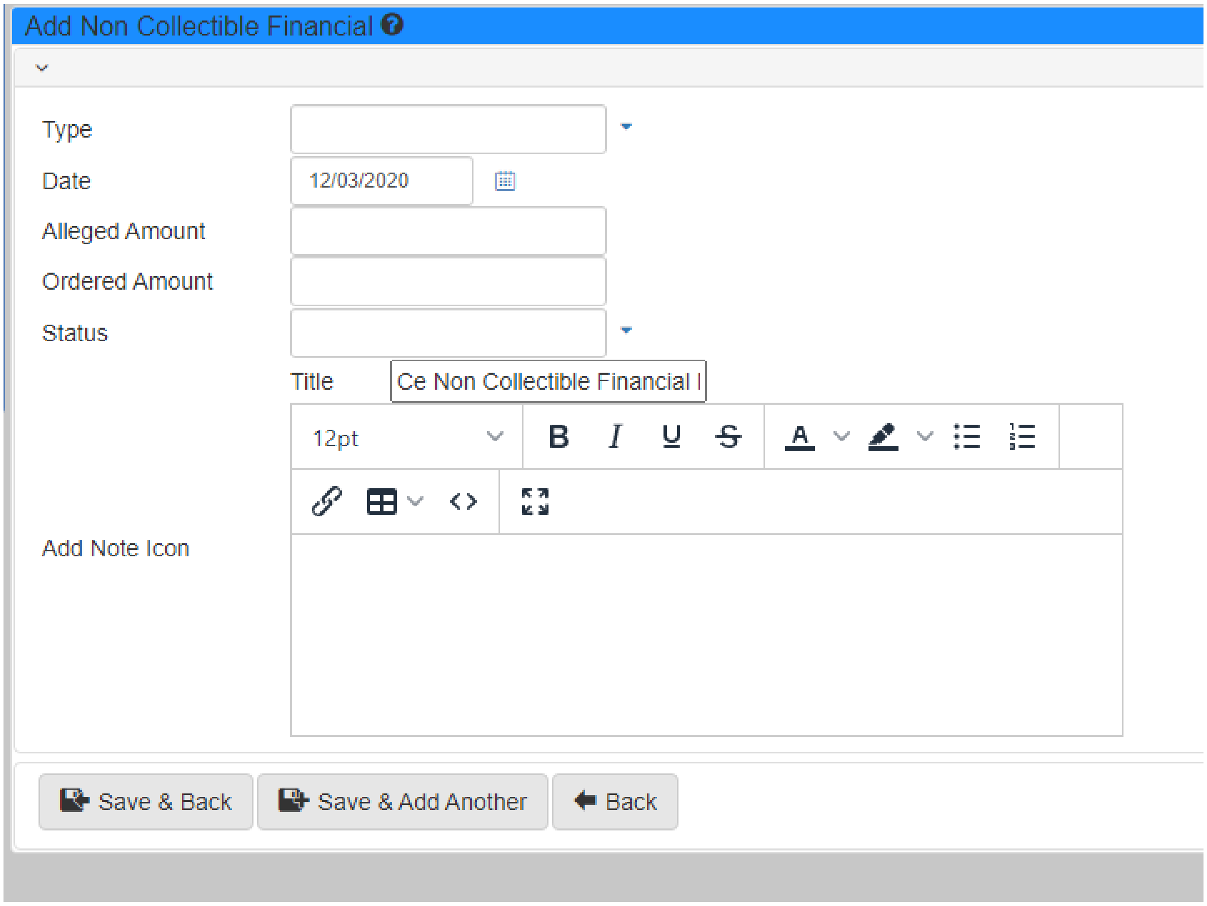
- Select **Add Communication** to document and store communication between case involvements.



Non-collectible financials



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

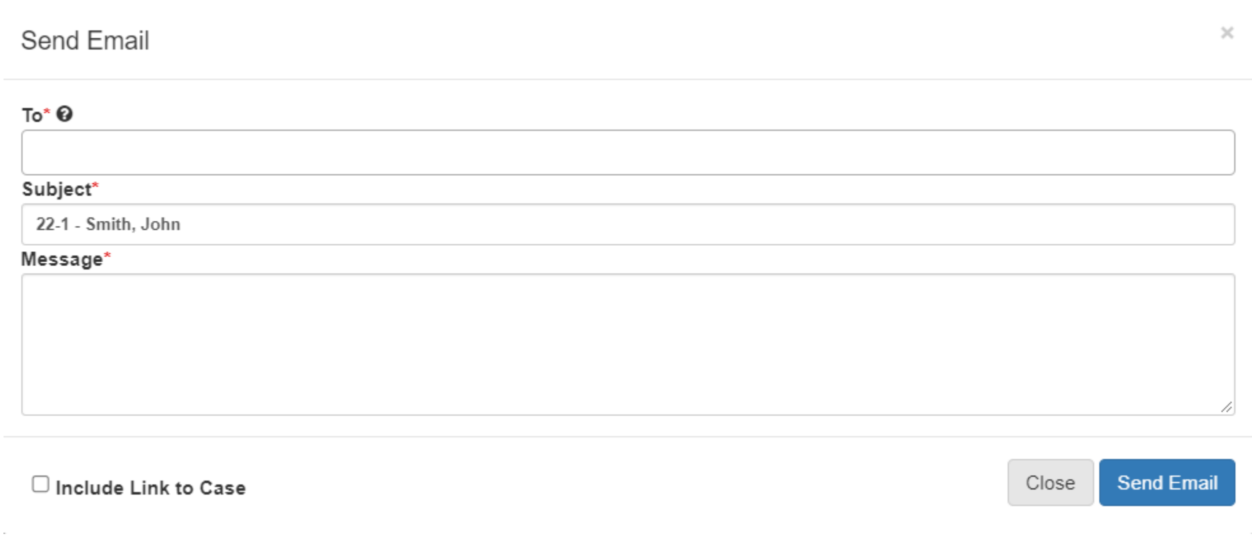


Case folder

Tab	Description
Case summary	The **Case Folder** shows: • 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 involvement s	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

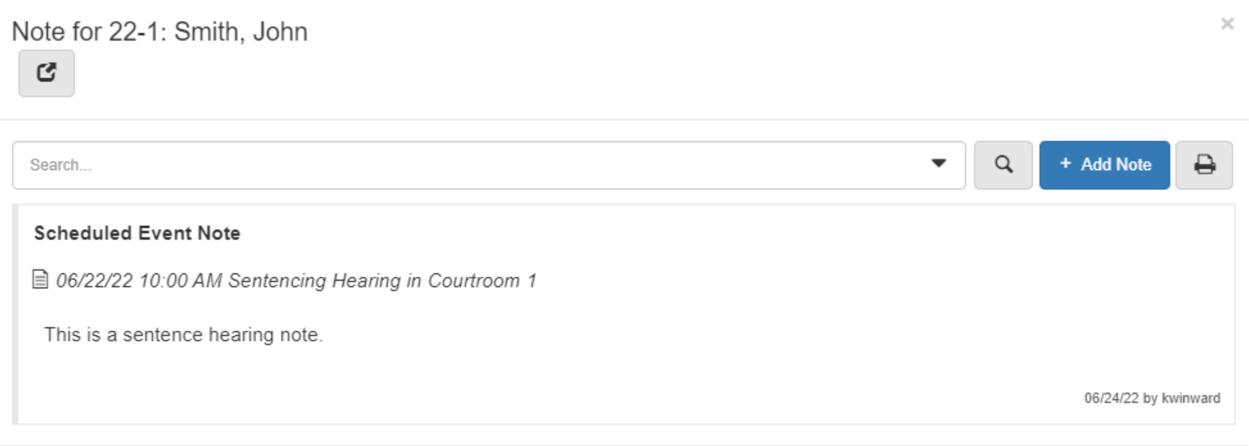


Use the **Send Email** widget to send an email regarding the **Case**. Select **Include Link to Case** to include a link to the case in the email.

Joined case widget

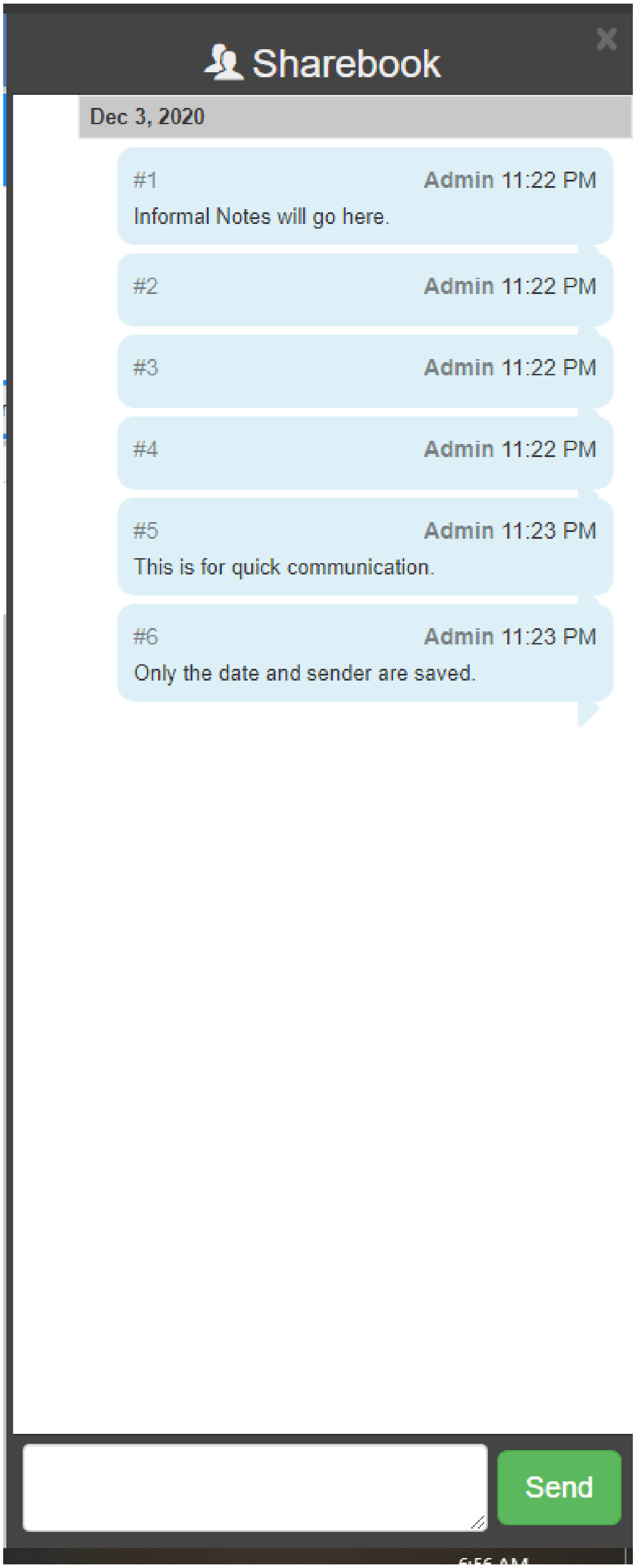
Use the **Joined Case** widget to show cases related to the current case. Click the **Case** number or title to show the lead or related cases.

Case note widget



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


Sharebook
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

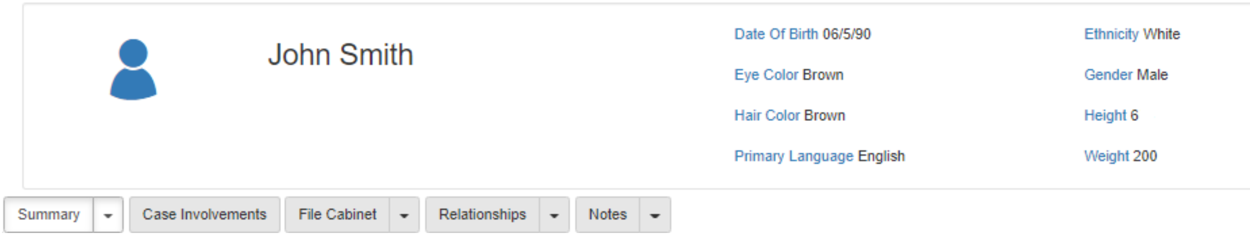
Use the **Sharebook** widget to add informal notes to the case. An informal note only includes the note text, the creation date, and the author.

Person navigation

Like the Case View [https://documentation.journaltech.com/eAttorney/user/navigation/case.html], 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.

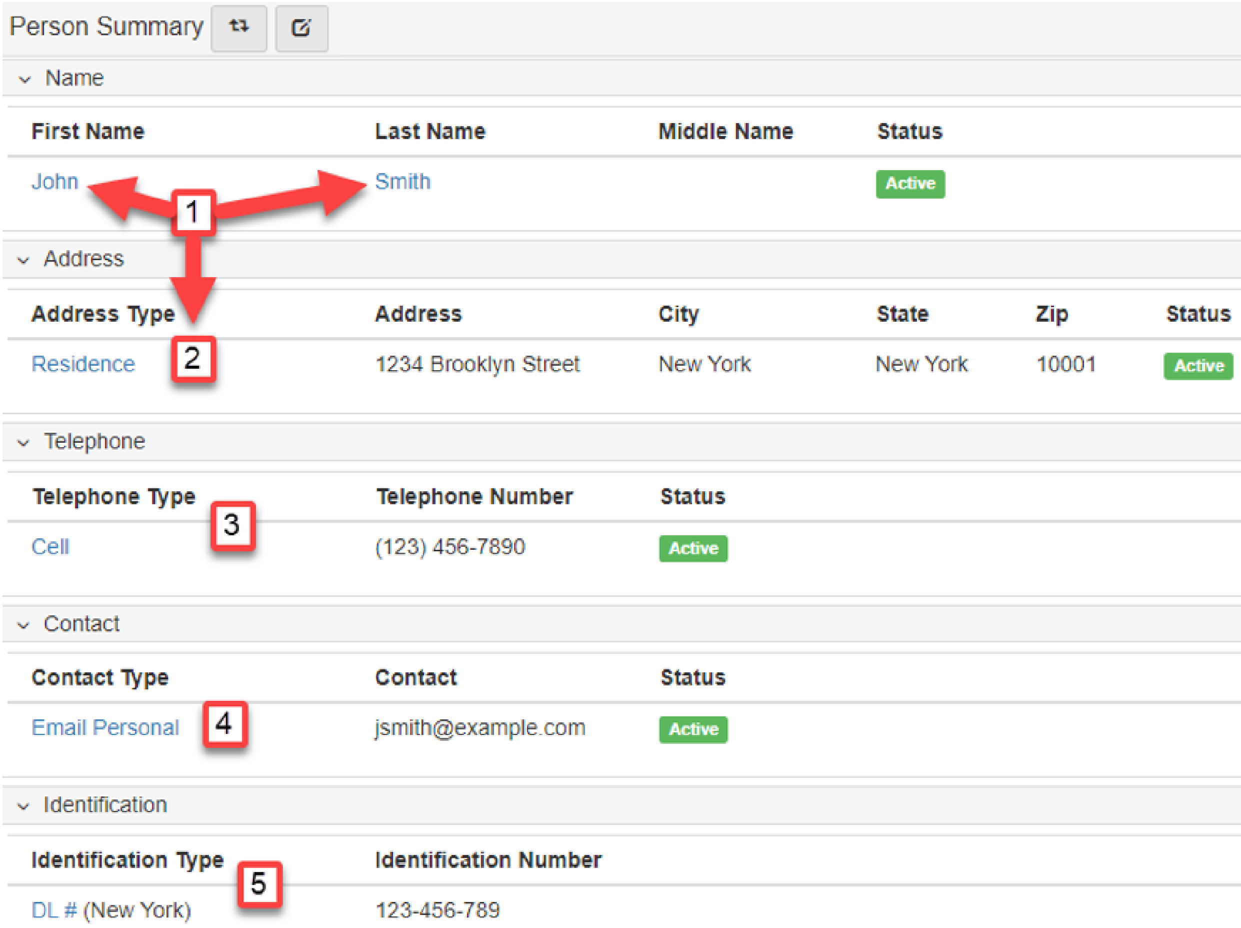
Header

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



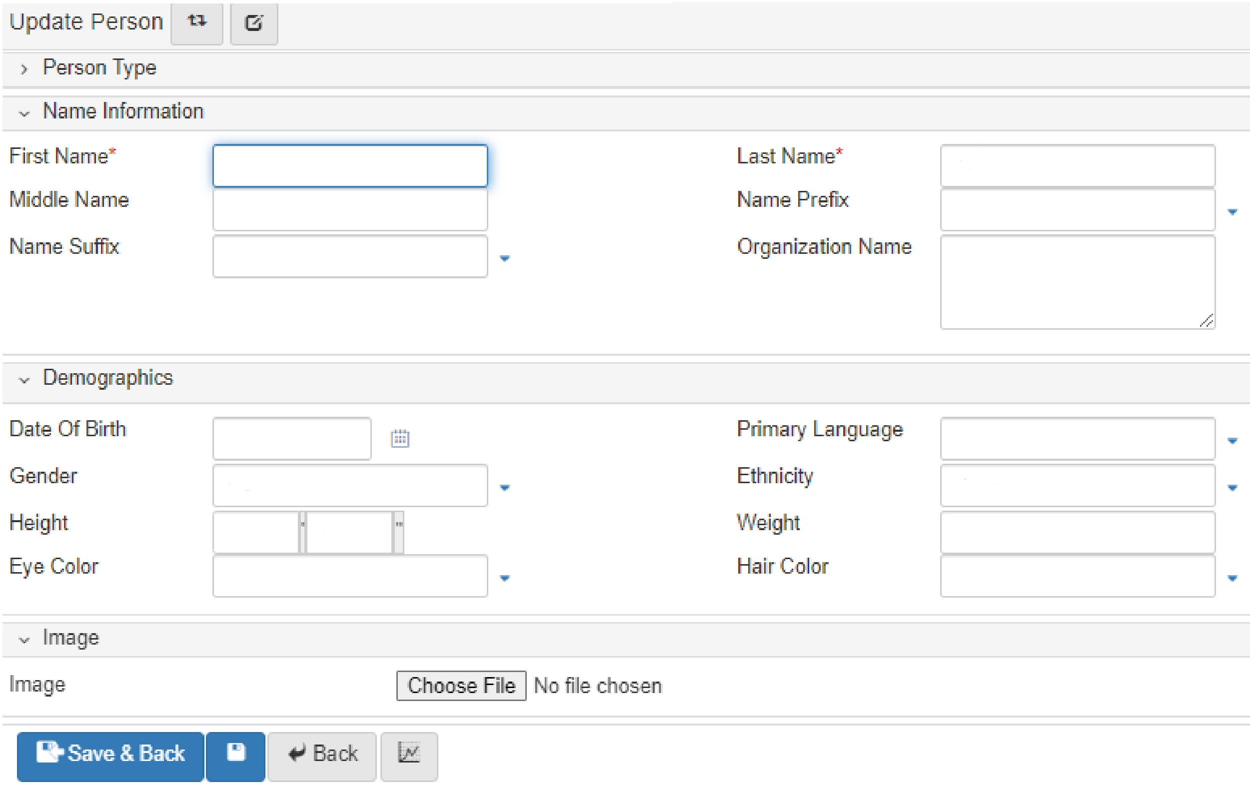
Summary

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.



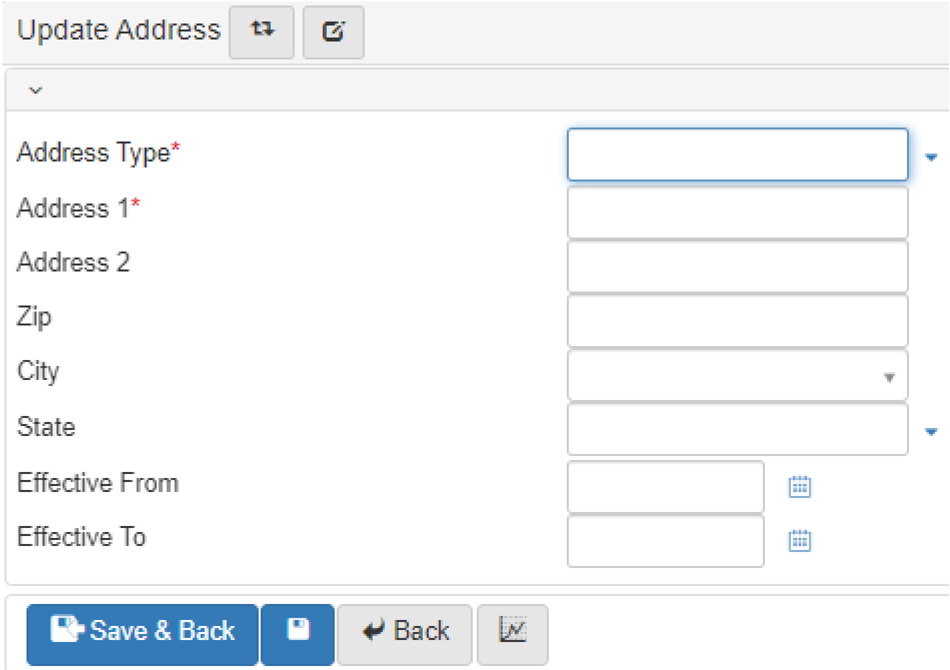
Update person

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



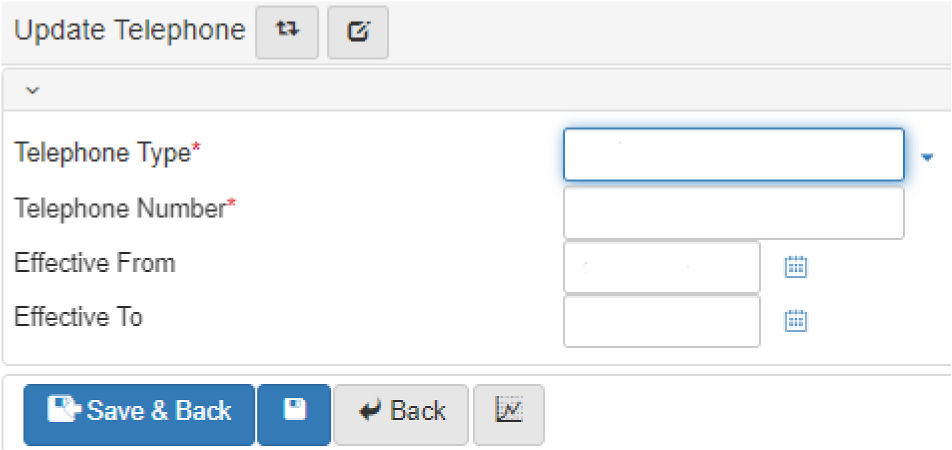
Update address

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



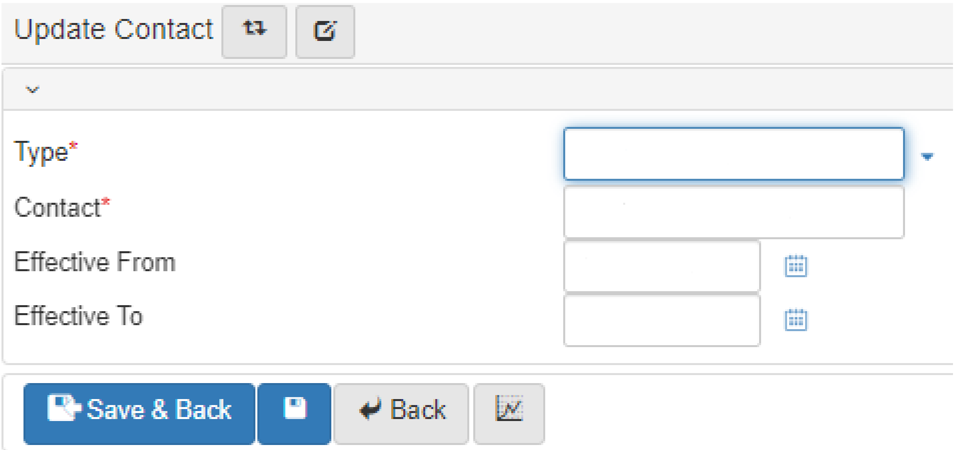
Update telephone

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

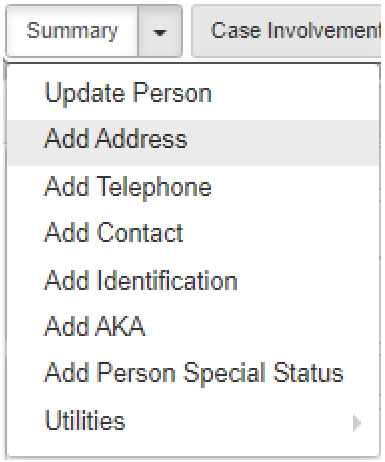


Update contact

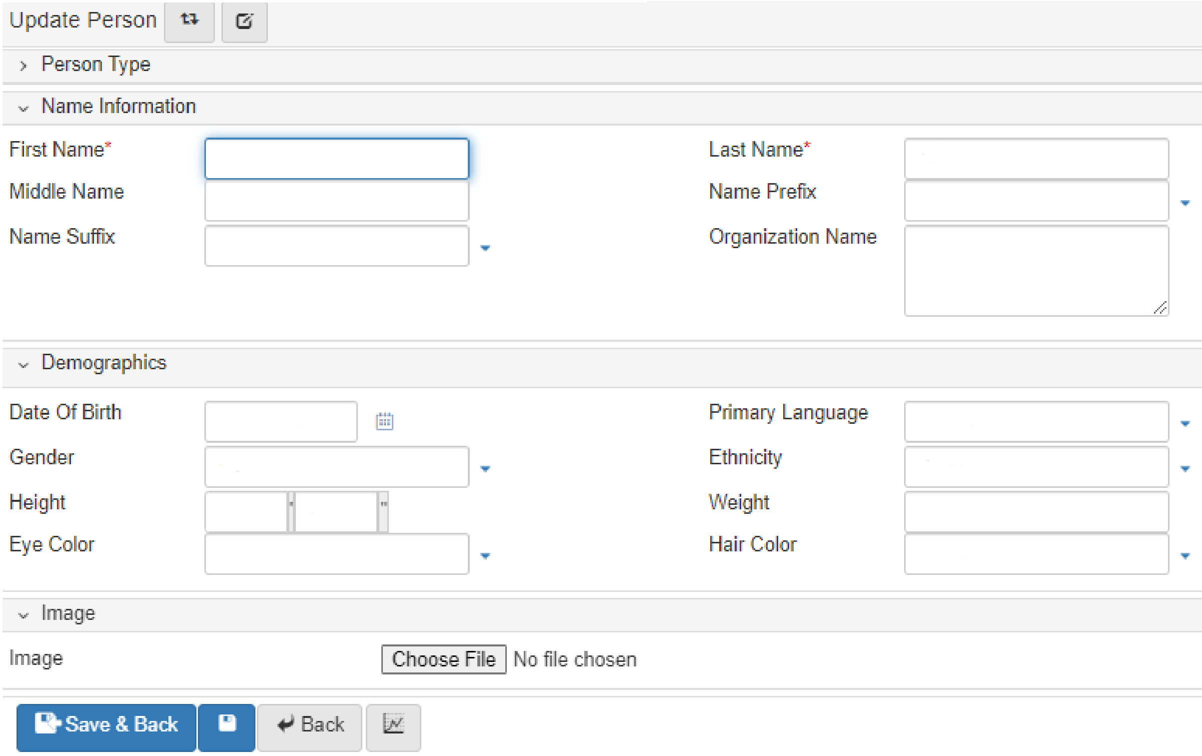
Click and change fields then click the Save button to update contact information:



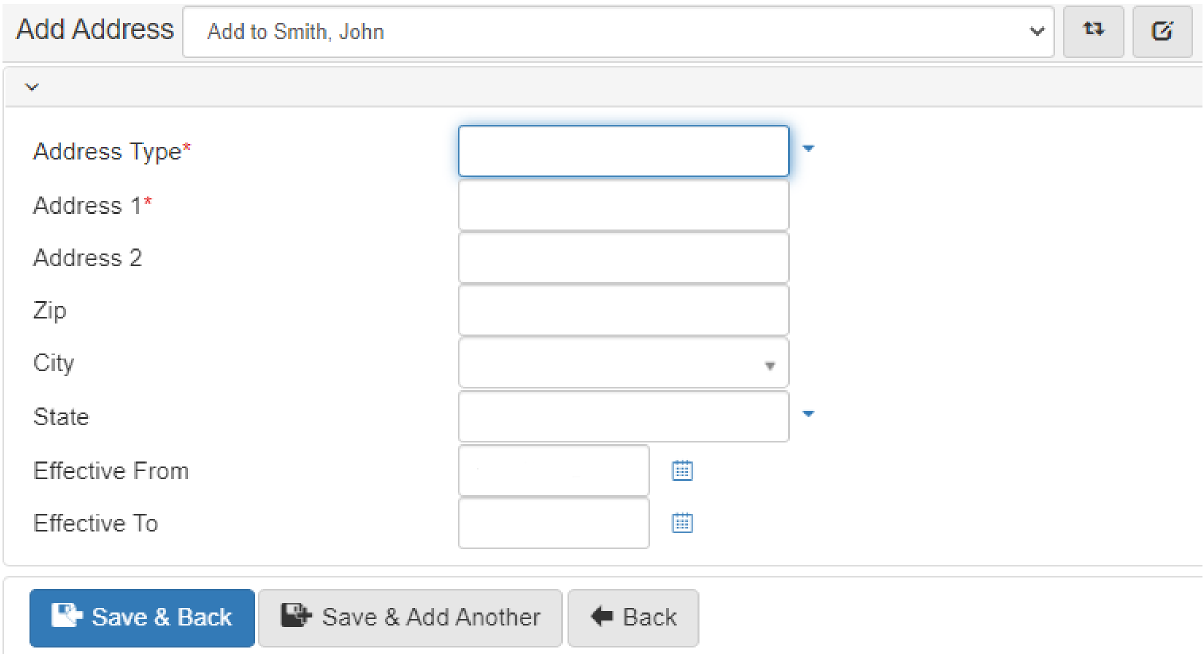
Dropdown



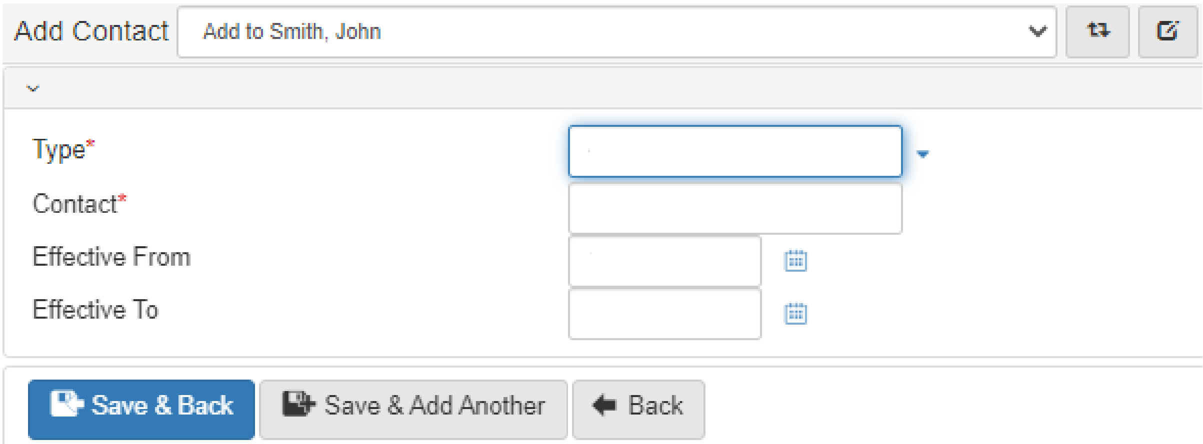
- Select **Update Person** to manage information, including name, date of birth, appearance, and a Header photo.



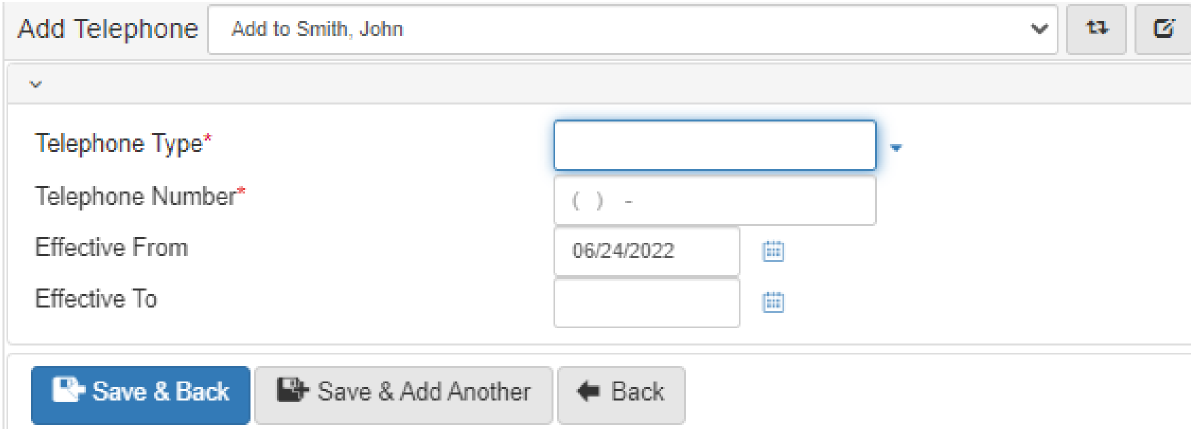
- Select **Add Address** to add an address for the **Person**.



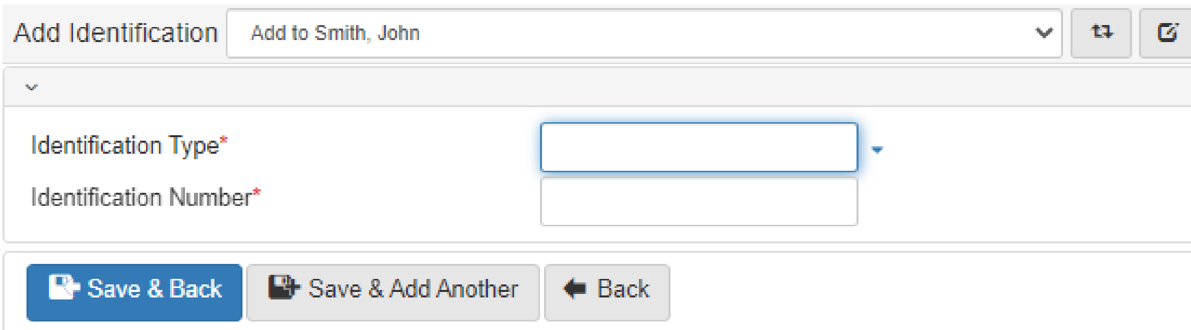
- Select **Add E-mail** to add an email address for the **Person**.



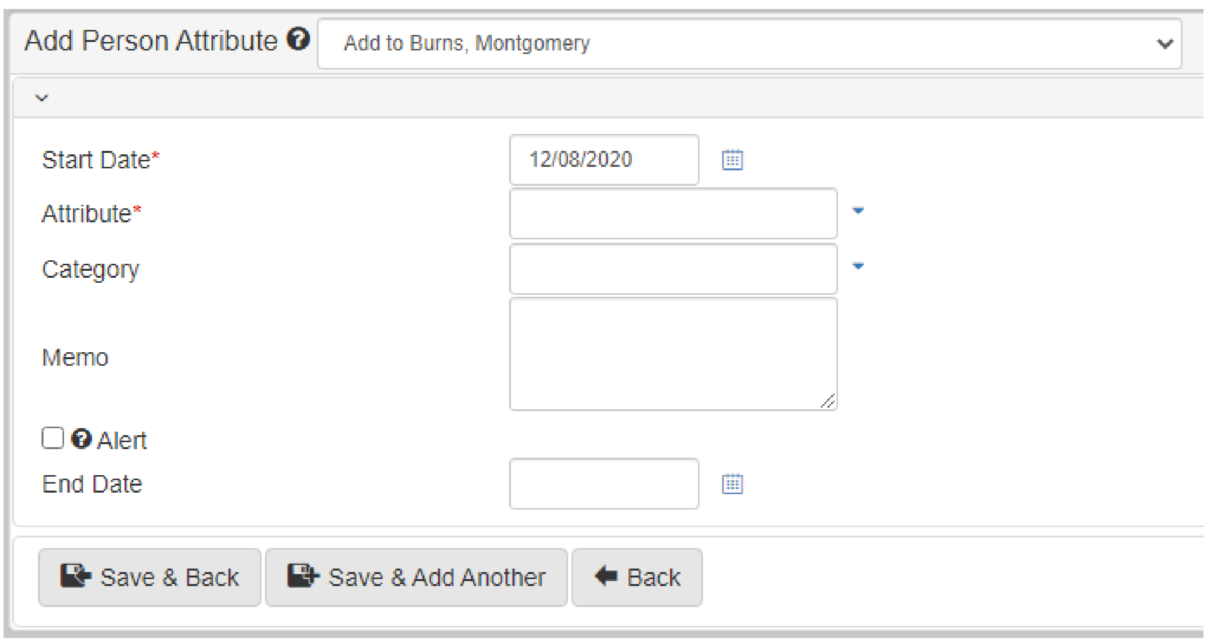
- Select **Add Telephone** to add a telephone number for the **Person**.



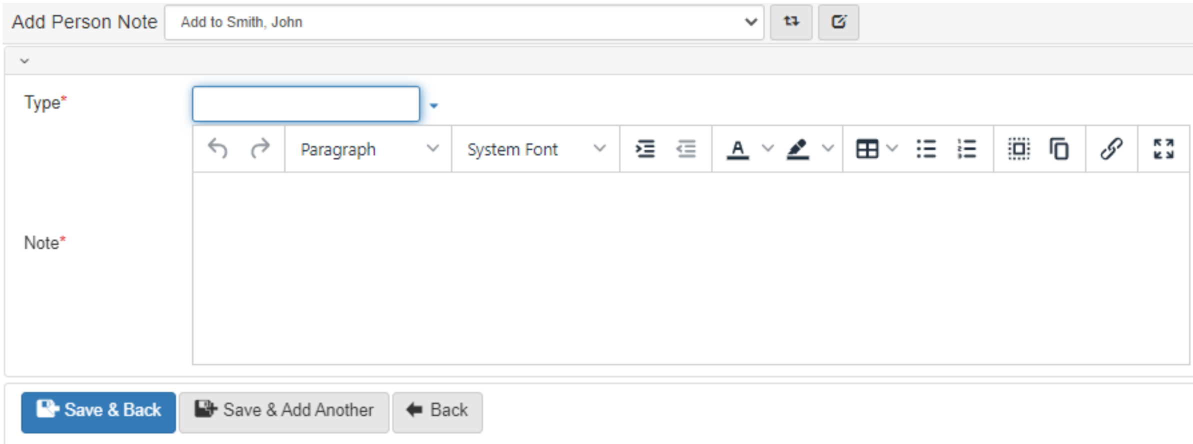
- Select **Add Identification** to add identifying documents for the **Person**.



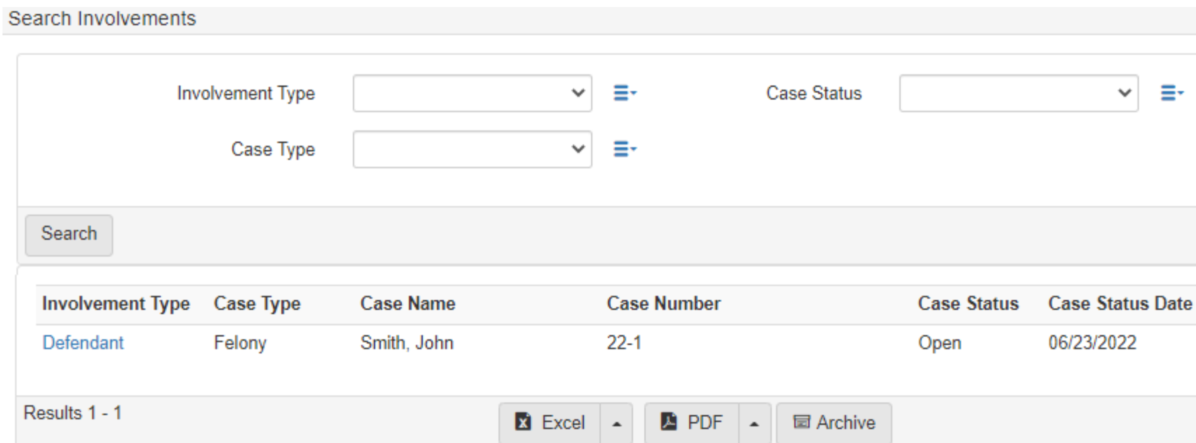
- Select **Add Person Attribute** to add descriptive attributes for the **Person**.



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



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

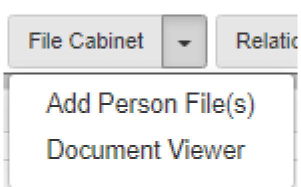


- Select **Person Merge (beta)** to Merge.

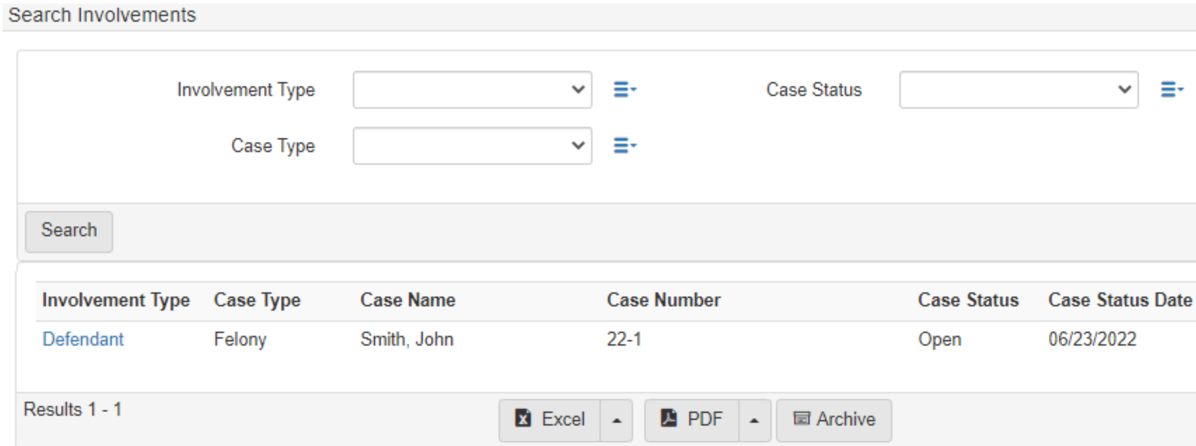
File cabinet:

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

Dropdown

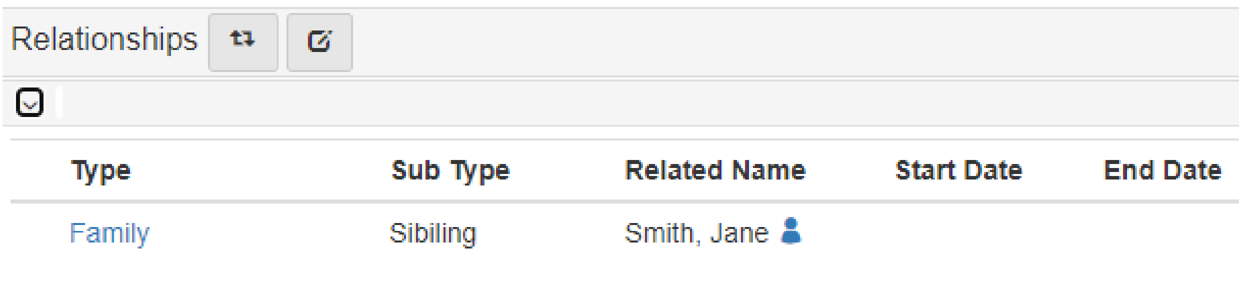


- Select **Add Person File(s)** to add files to the **Person**.

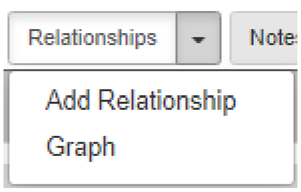


Relationships

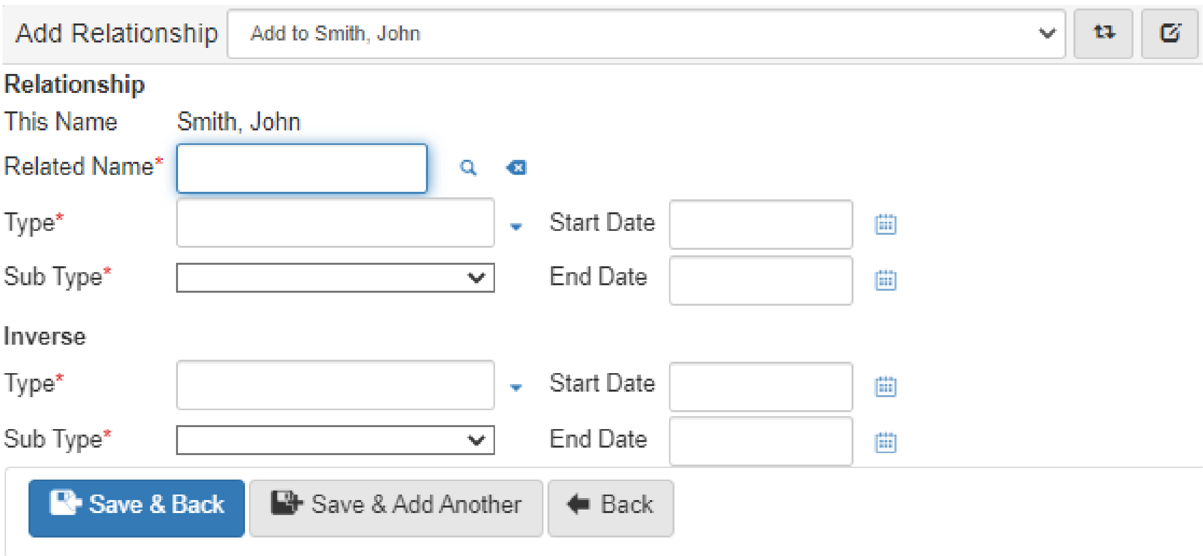
The **Relationship Folder View** shows all relationships of the selected person and allows for quick editing by clicking a relationship. Refer to Relationships for more information.



Dropdown



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



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

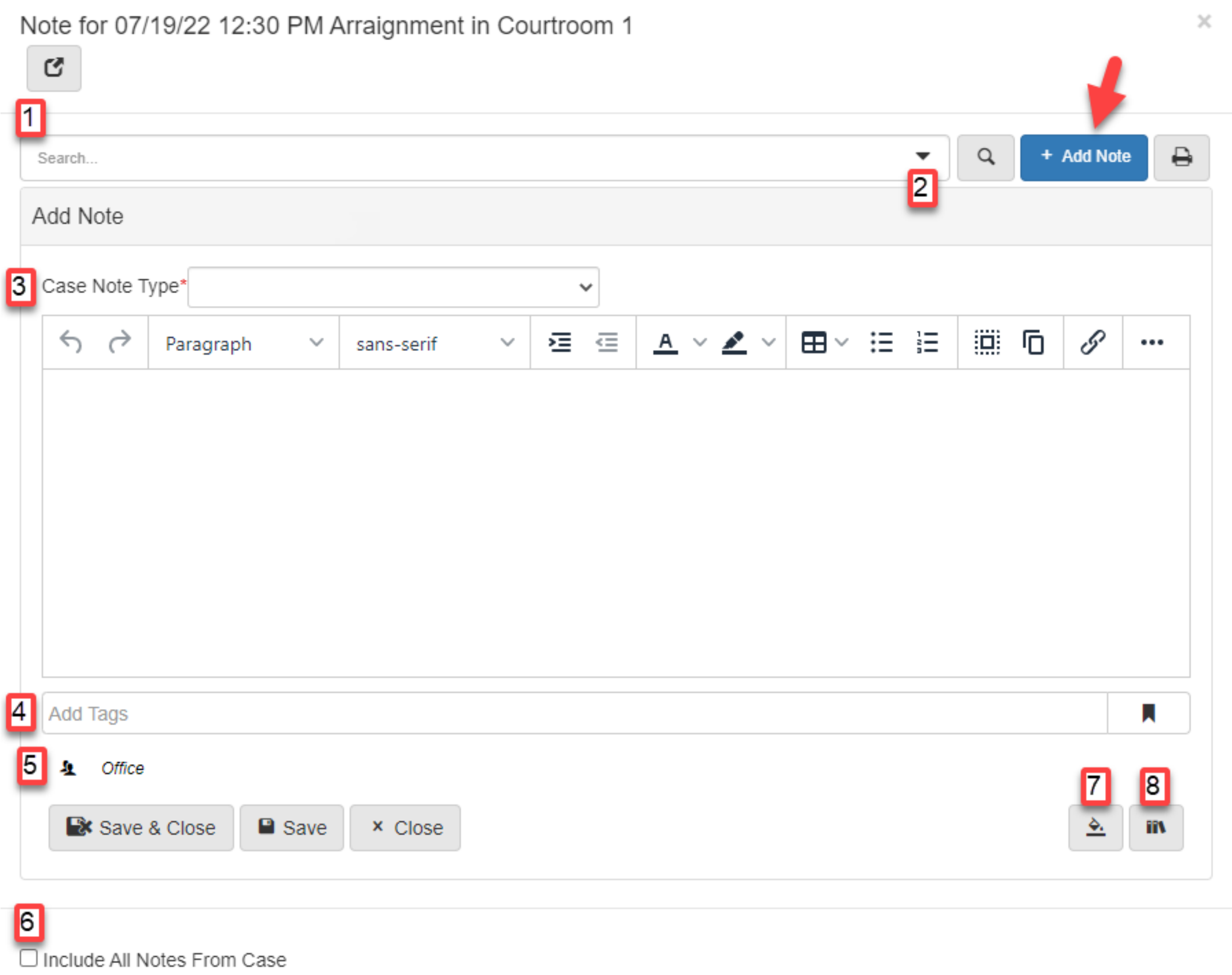
Hovering over an icon link shows a tooltip indicating the icon click action.

Person or directory person record

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

Add note for record

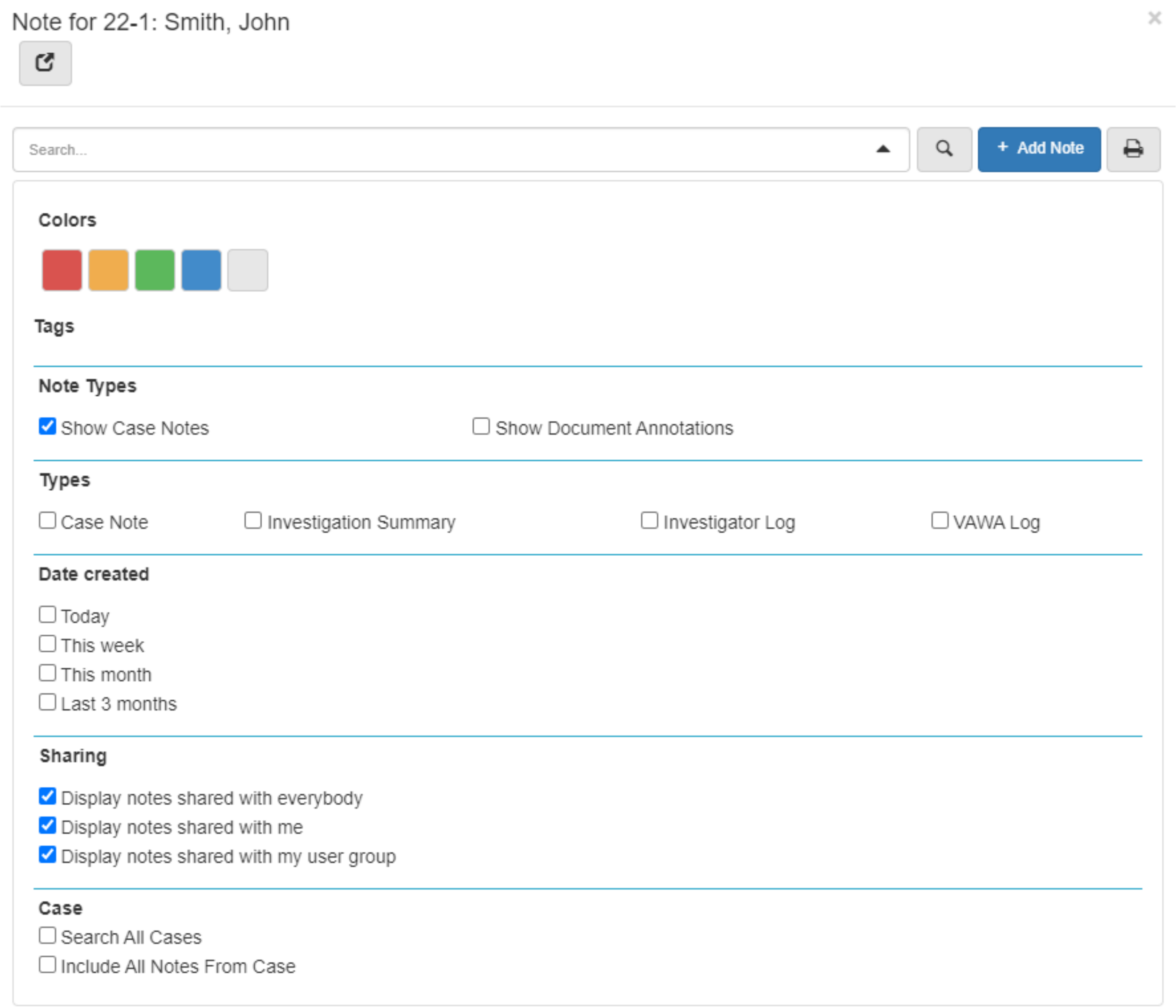
Some row records allow you to add a note directly. Click or to open the **Add Notes** widget.



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.

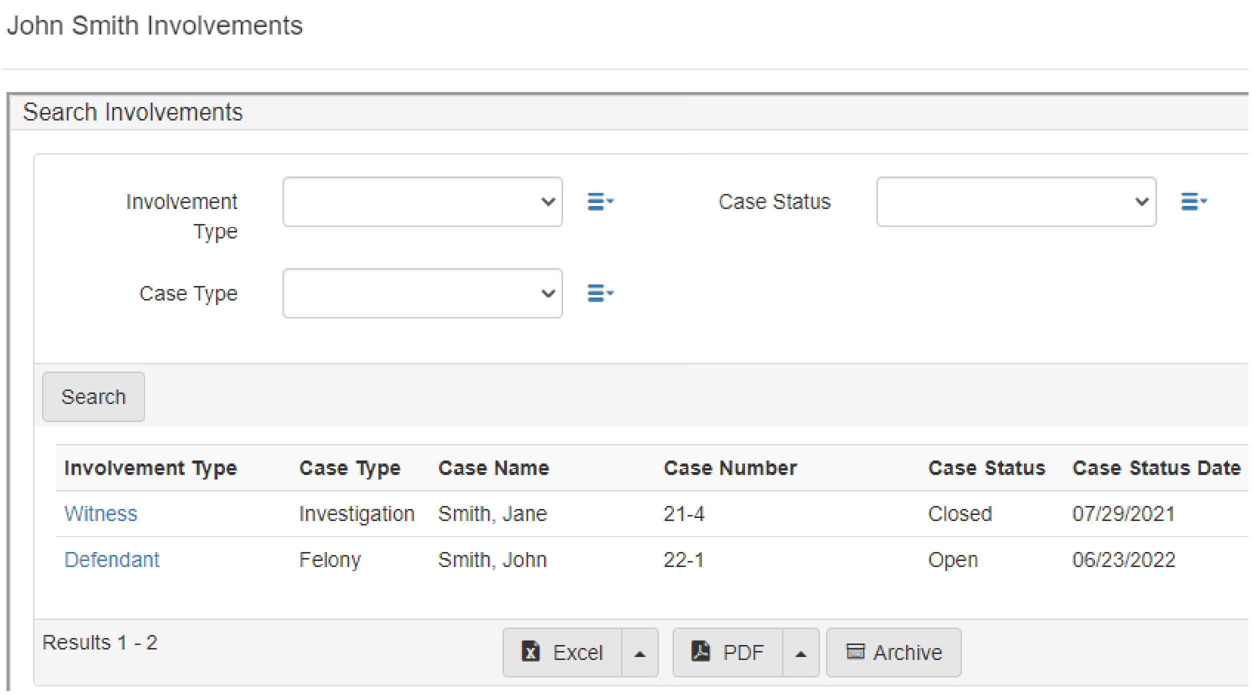
Advanced note search

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



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.

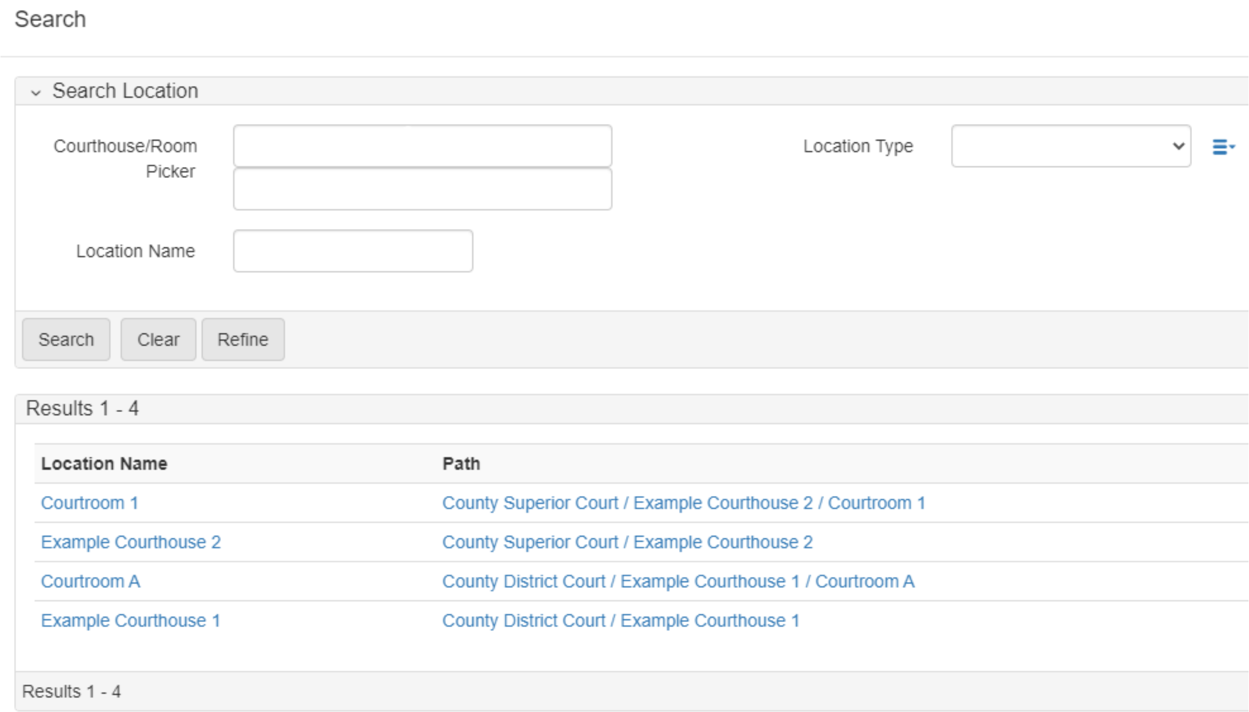


Collapse or expand panels

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

Lookup

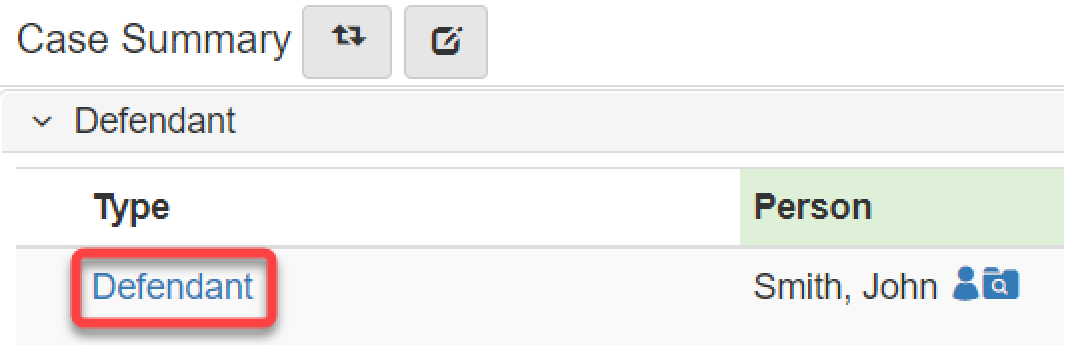
Click to open an **Advanced Search** popup. The icon shows next to **Search** field in **Add** forms. The search may be for a **Case**, **Person**, or other entity.



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.



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

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

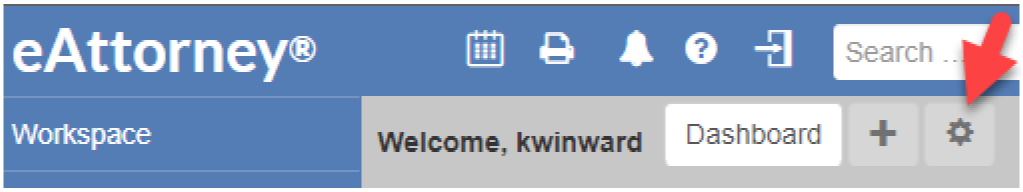
Dashboard

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.

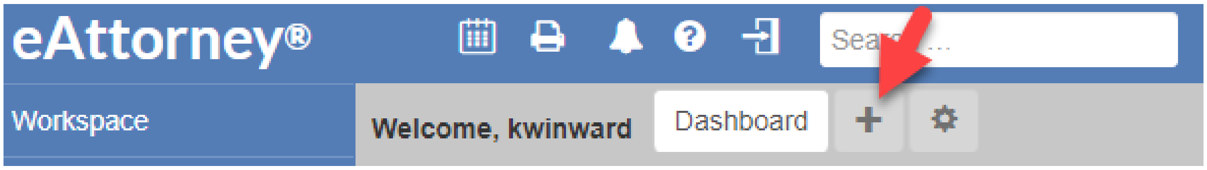
News [https://documentation.journaltech.com/eAttorney/user/dashboard/news.html]
View court news
Notepad
Notepad for personal reminders and post-its
Recent reports [https://documentation.journaltech.com/eAttorney/user/dashboard/recent_reports.html]
View recent generated reports
Saved search results [https://documentation.journaltech.com/eAttorney/user/dashboard/saved_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

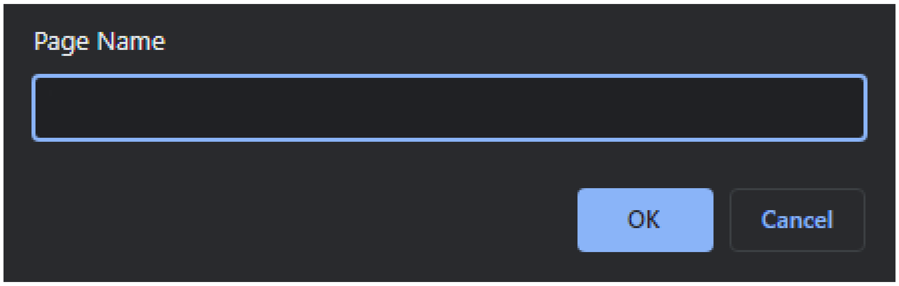
An individual dashboard may be configured to use an arbitrary number of Gadgets, including multiple copies of the same Gadget with different configurations. Despite this, users may find it more convenient to add more tabs to the dashboard, creating different screens for different types of information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



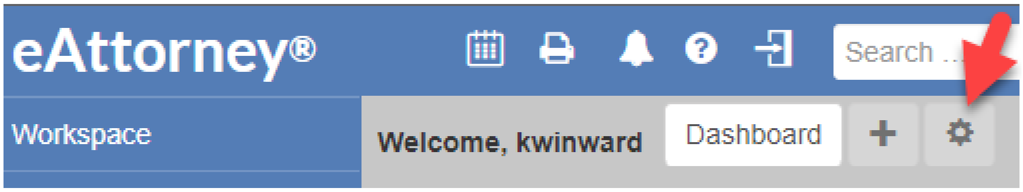
4. Fill in the prompt with the name of the new dashboard, then click [OK].
5. The new tab behaves exactly like the first dashboard, the only difference being separately configured Gadgets.

Archived search gadget

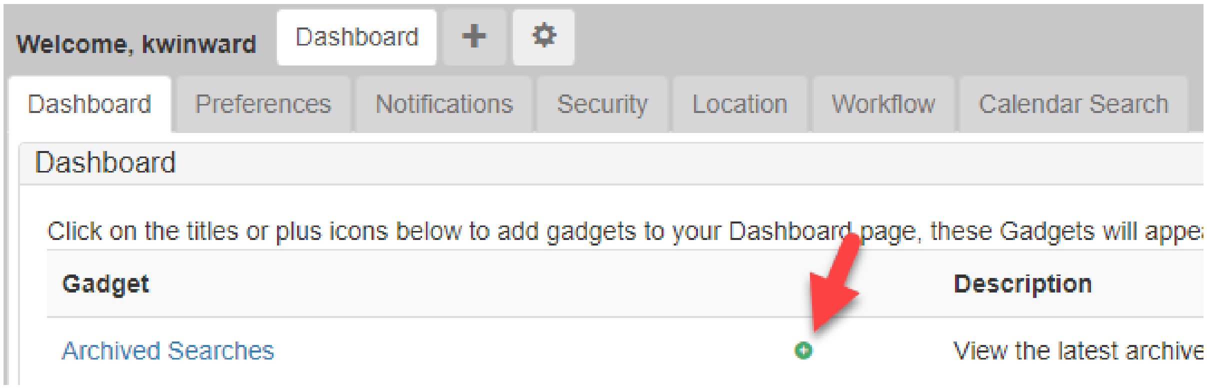
The **Saved Searches** gadget shows a list of saved searches with the option to quickly run or open them directly. The search can also be expanded to show the search parameters.

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:

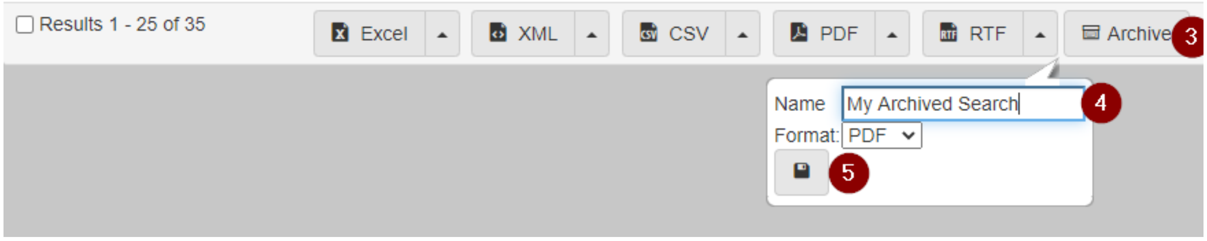


3. Click the + button next to the Archived Searches item:



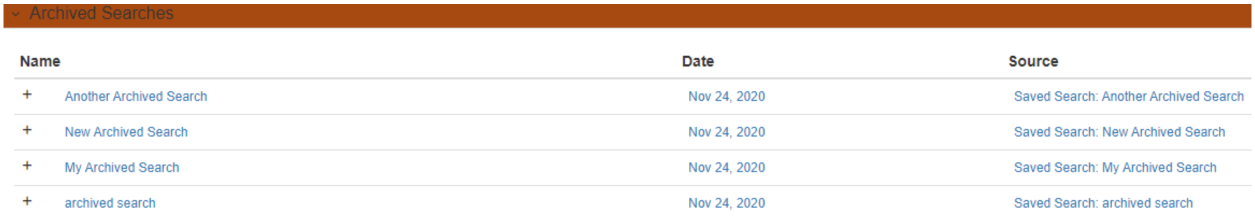
Create an archived search

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

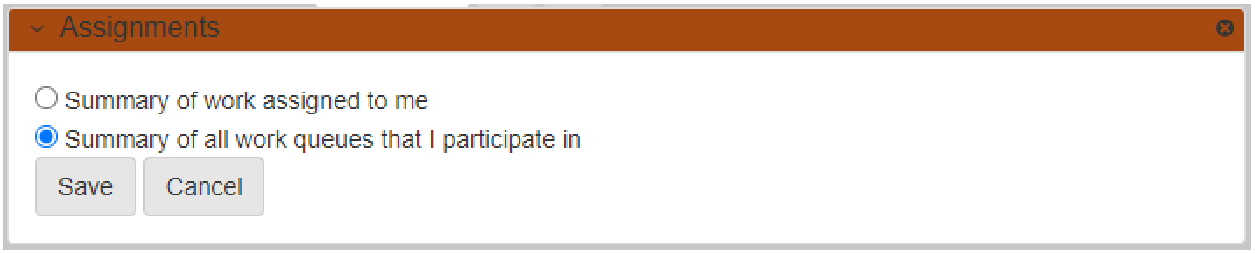
1. Each **Archived Search** is listed by Date.
2. Click the name of the **Archived Search** to download the associated file.

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:

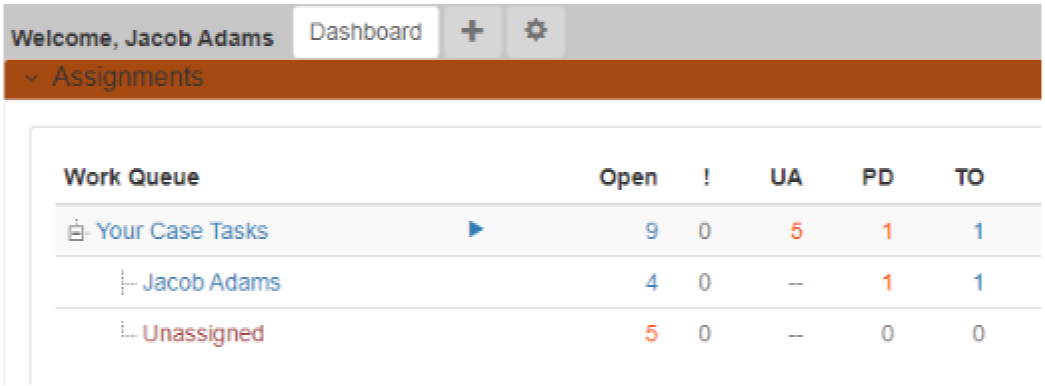


There are two options to choose from when configuring the gadget:

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.



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.

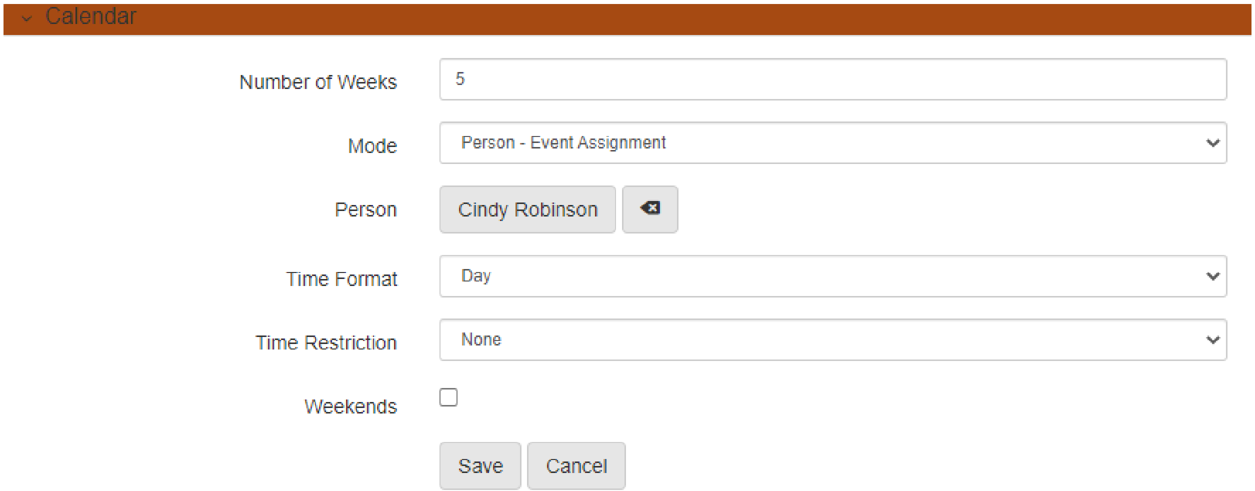
Calendar gadget

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.

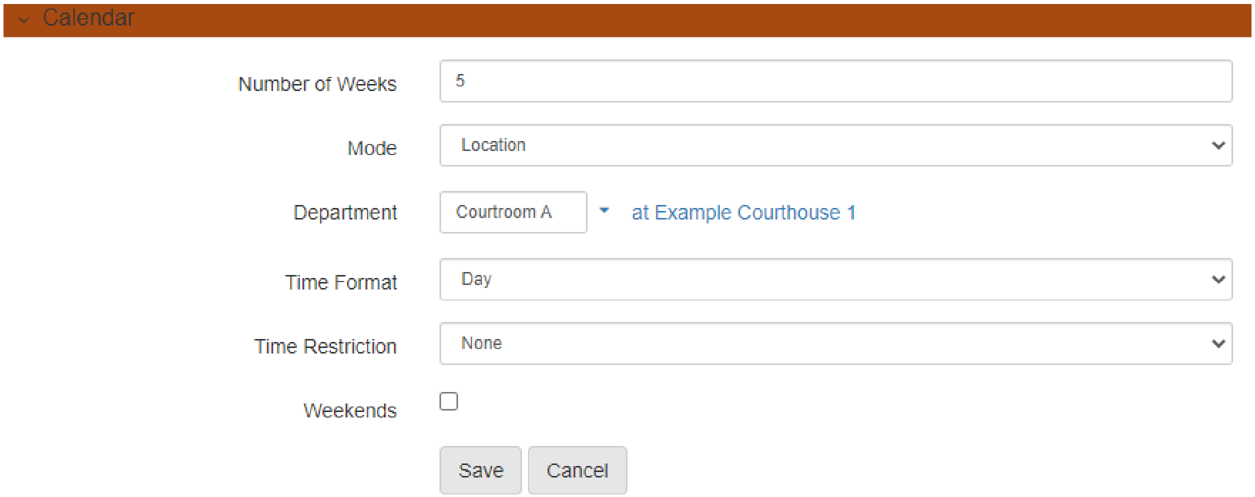
Configure the calendar

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.



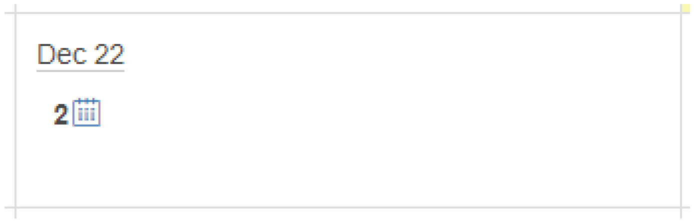
In addition to a person, you can configure the calendar to show information for location:



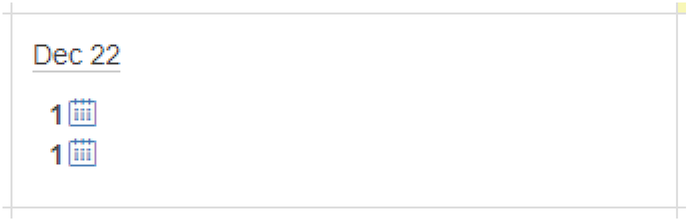
Calendar fields

- **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:

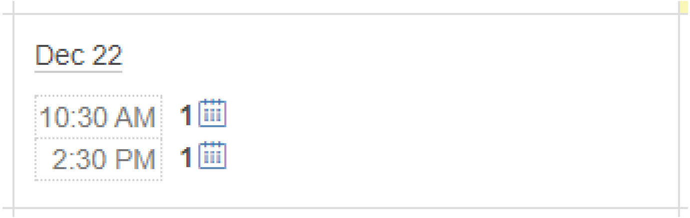
  a. **Day**:

  b. **AM PM**:



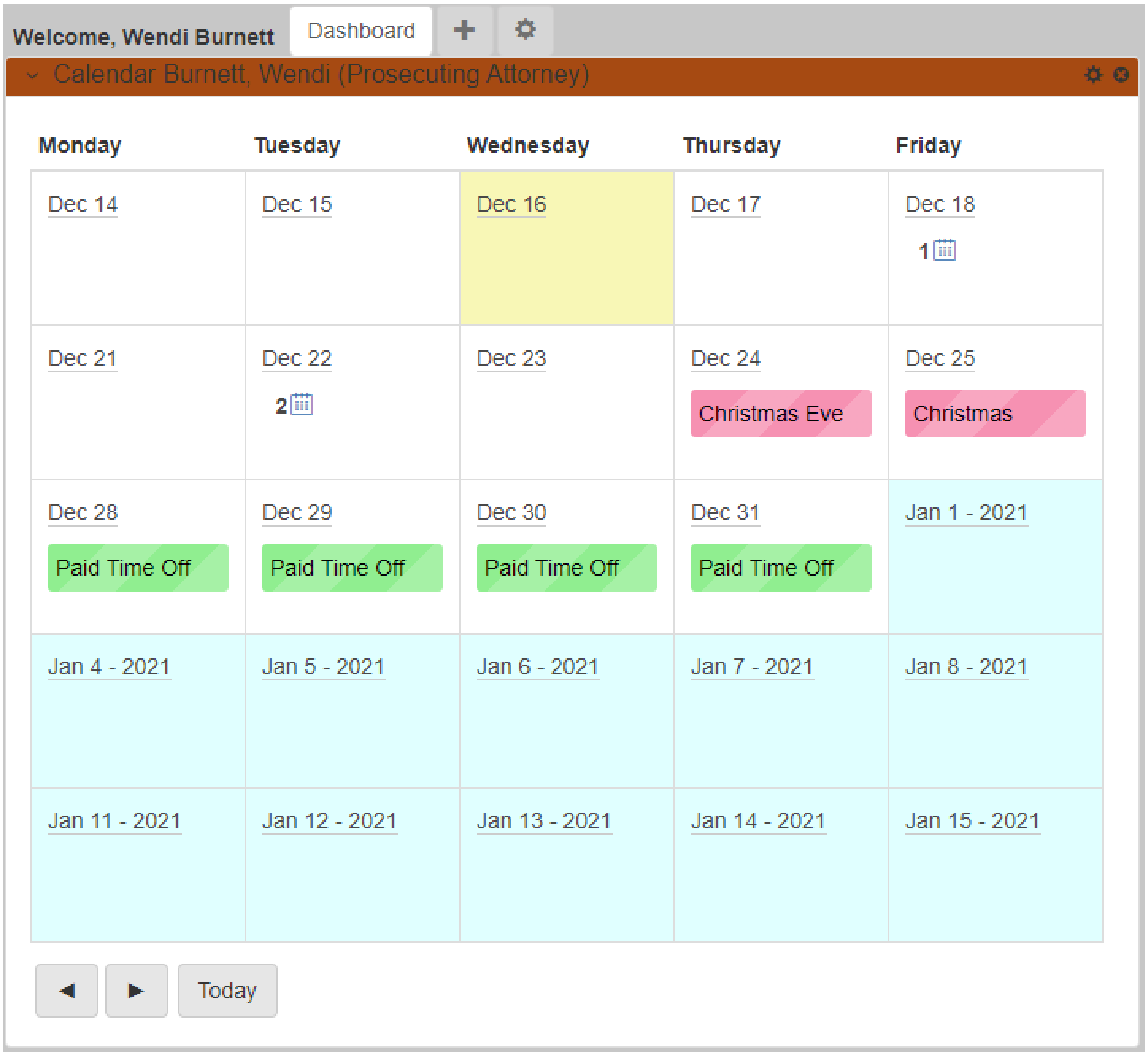
c. **Start Time**:



- **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.

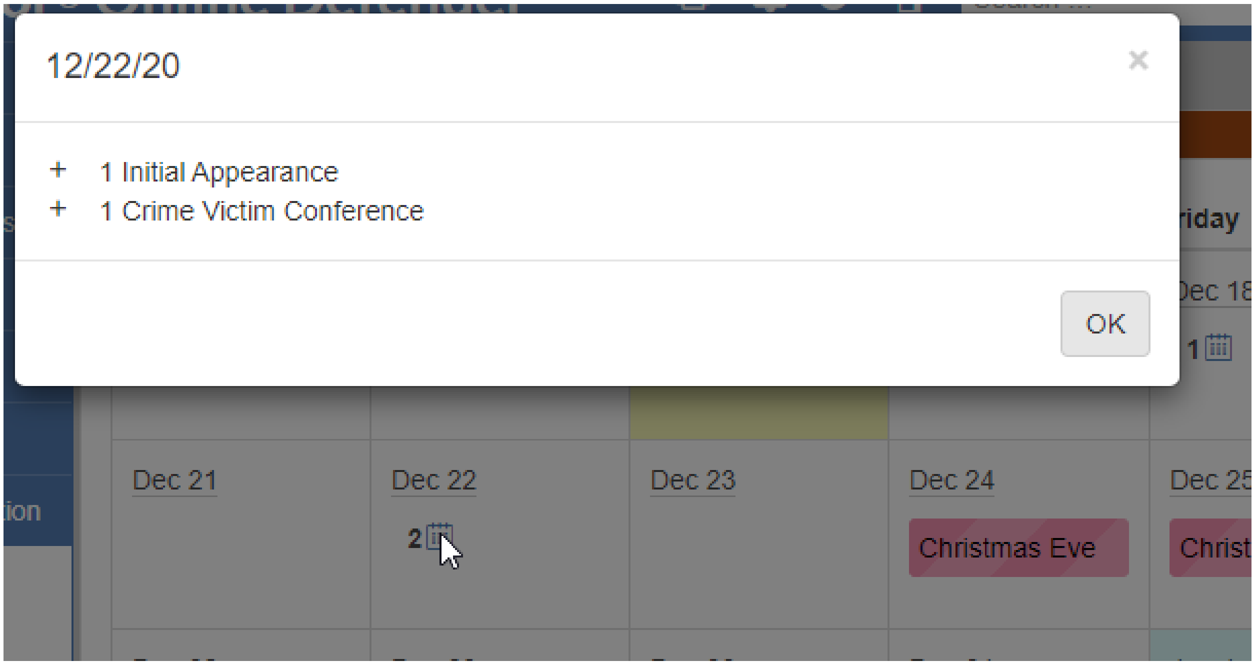
View the calendar

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



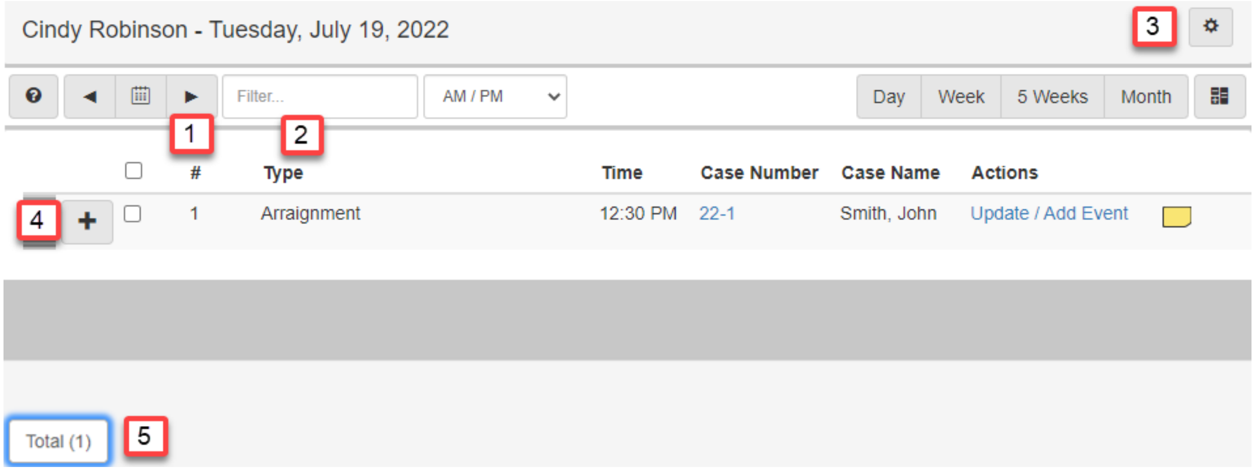
As you can see, the calendar shows events, holidays, and off time for the selected person. Holidays and off time are configured by the administrator.

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.

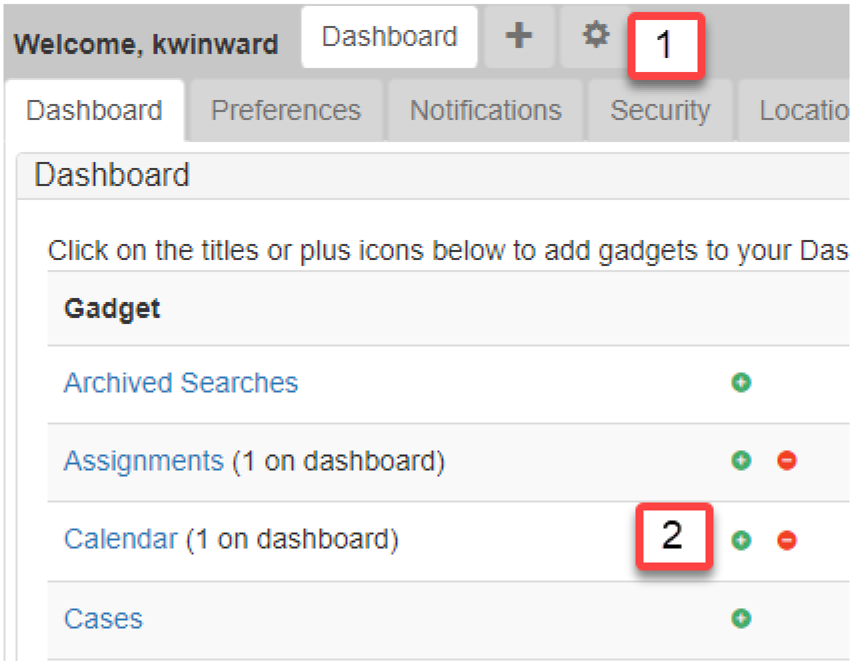
Cases

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.

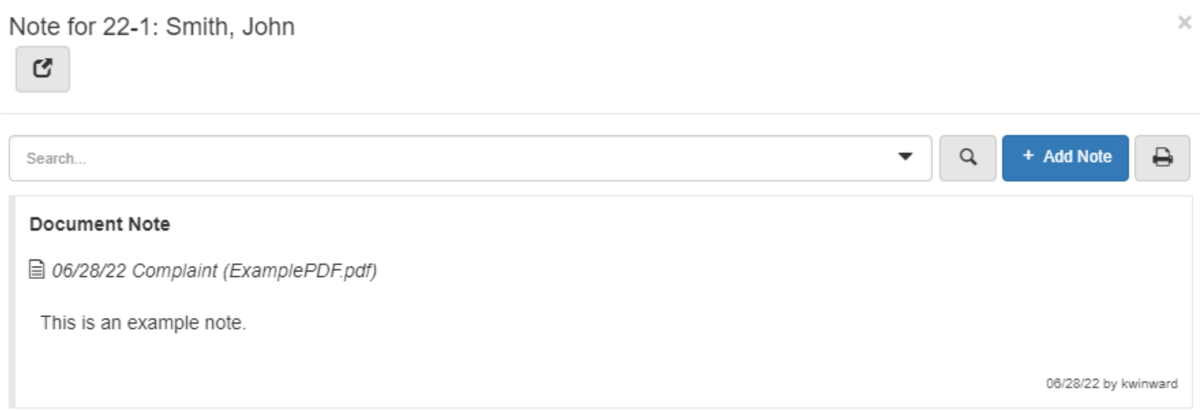


You should now be able to see the Cases Gadget at the bottom of your Settings screen. Click Close Settings to exit.

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:

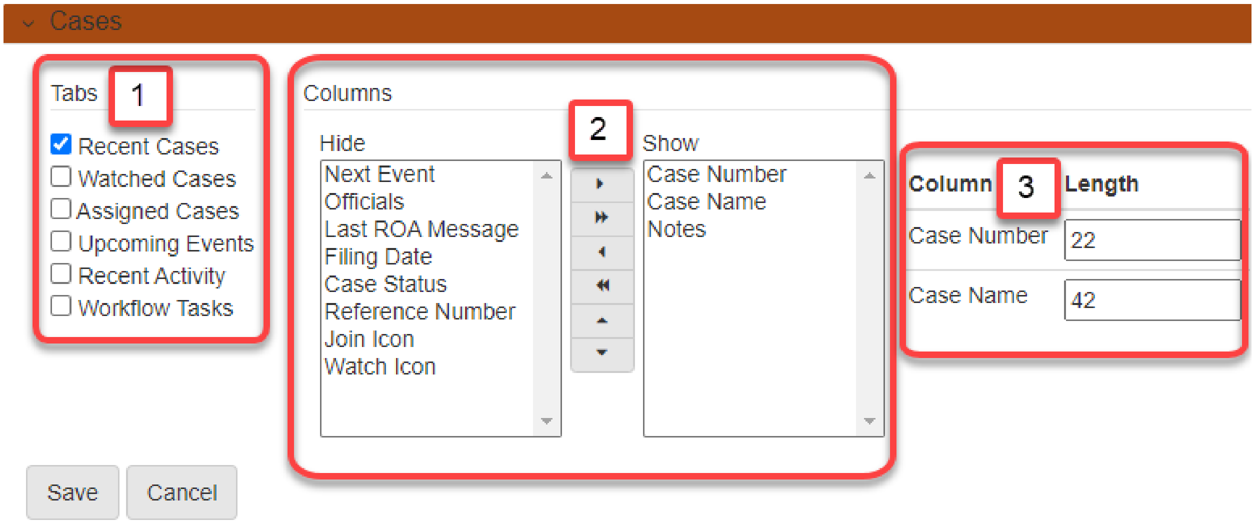
1. Click a CaseId to navigate to the recent case.
2. Click a Case Title to navigate to the recent case.
3. The `Paper Icon` opens the Case Notes in a popup.
4. View More... navigates to the `My Recent Cases` predefined screen. It looks similar to the gadget.



5. Clicking the `Cog Wheel` opens Gadget configuration.

Configure the cases gadget

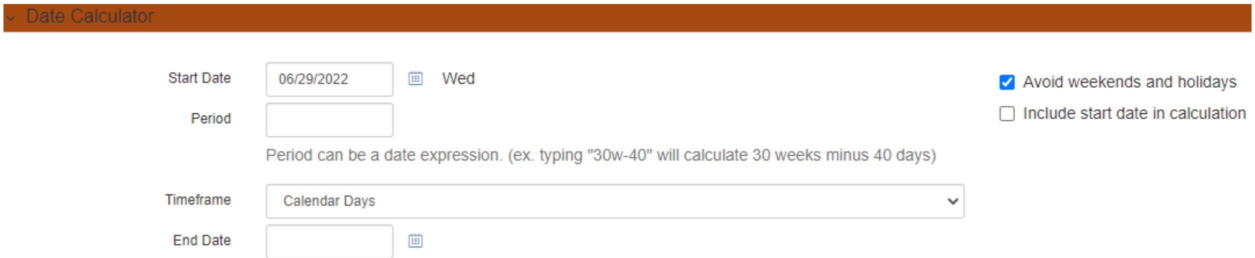
The Cases gadget can also be configured to show other case related information. To configure the gadget click the gear icon found in the top right corner of the gadget (#5):



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	One of two options: 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. 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.
Timeframe	The unit of time to use for the **Period**. Valid values are: **Business Days**, **Calendar Days**, **Months**, **Weeks**, **Years**. For example: to calculate 15 business days from now, you would enter `15` as the **Period** and **Business Days** as the **Timeframe**.
End Date	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**.
Avoid weekends and holidays	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.
Avoid off times for <User Name>	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.

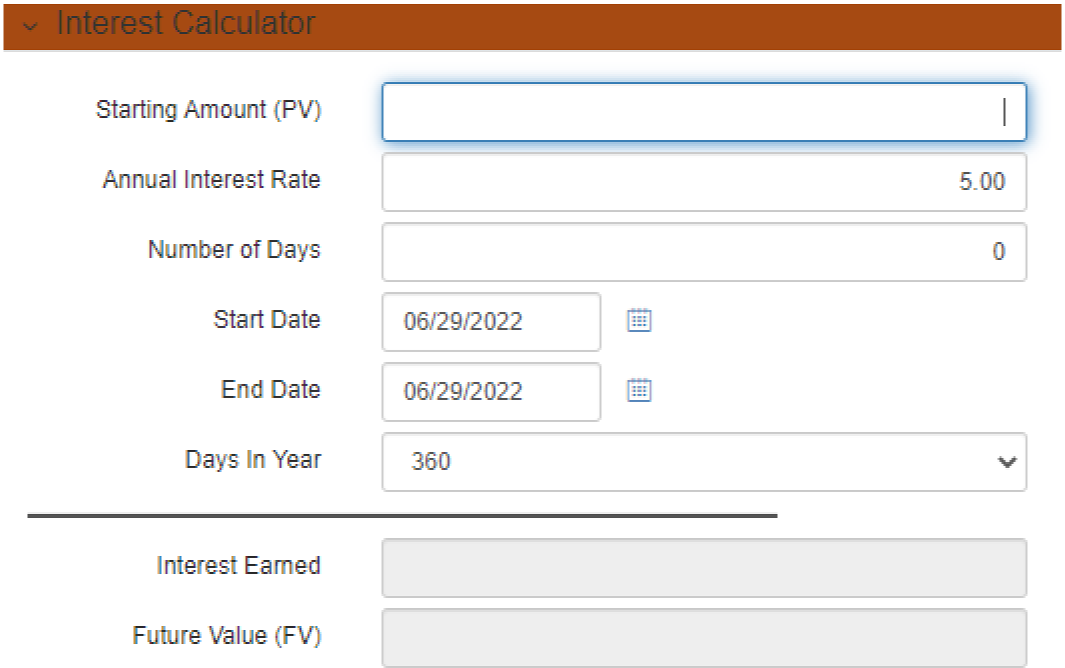
Directory search gadget

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.

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.



Field descriptions

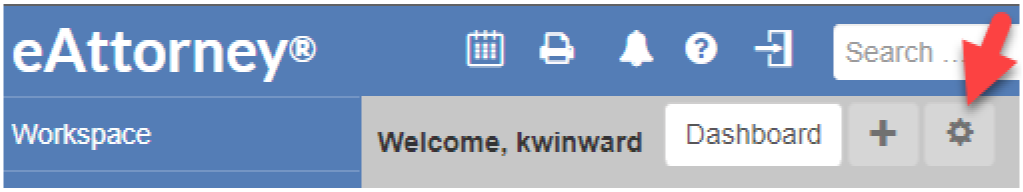
- **Starting Amount (PV):** PV stands for "Present Value" and is the starting amount you would like to use in your calculation.
- **Annual Interest Rate:** The interest rate over a year that is applied to the Starting Amount.
- **Number of Days:** This is how many days the interest accrues for.
- **Start 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

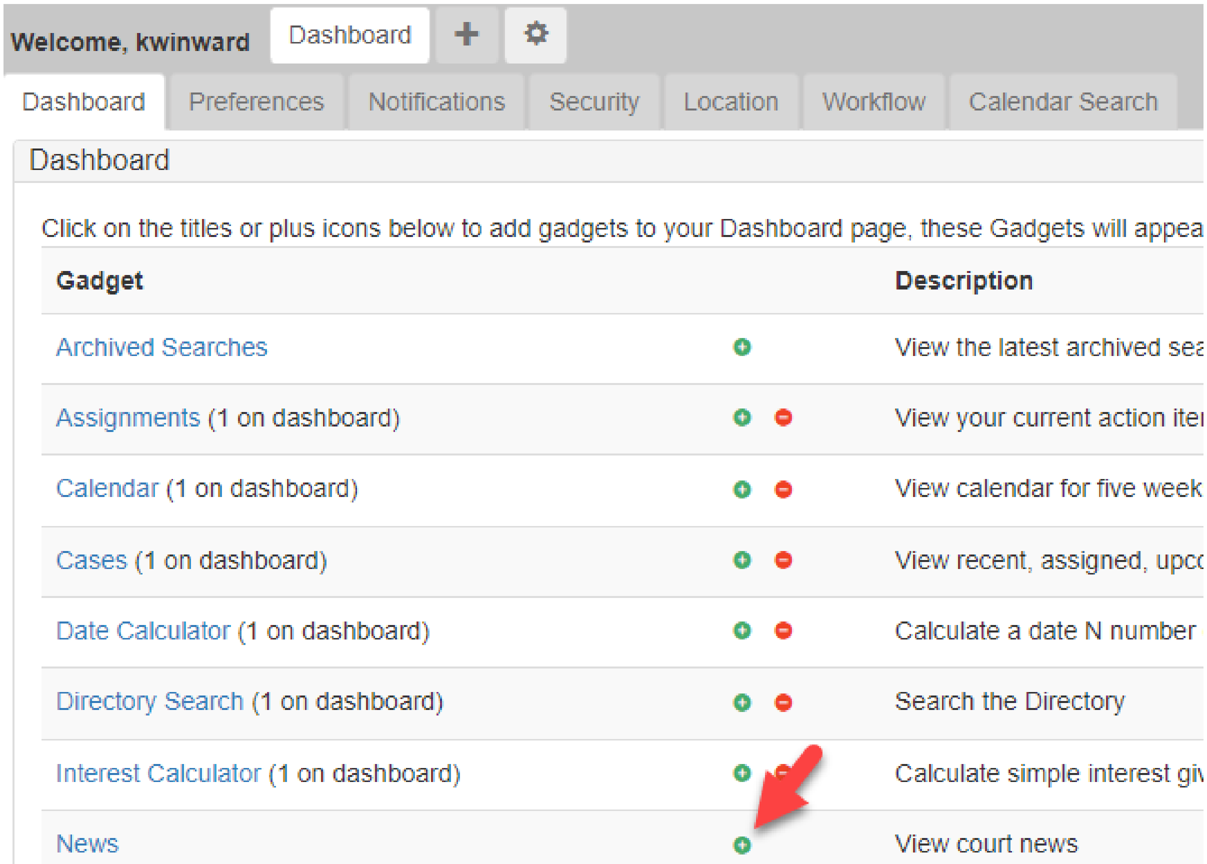
The **News gadget** shows a message from administrators.

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.

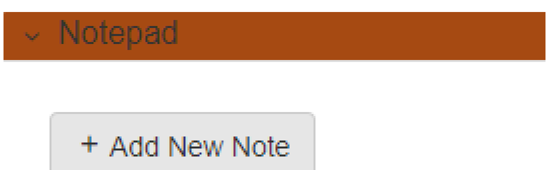


3. Click **[+]** next to the **News** item:

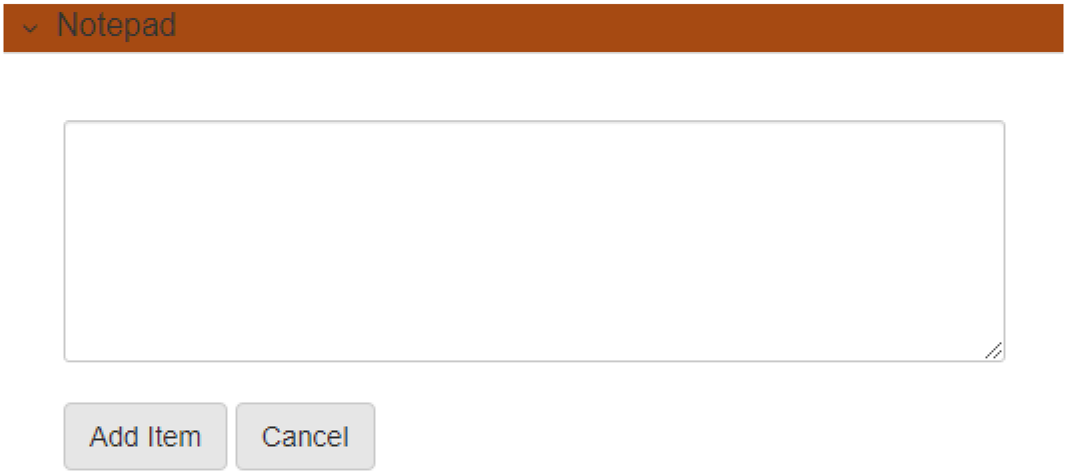


Notepad gadget

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]**.



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.

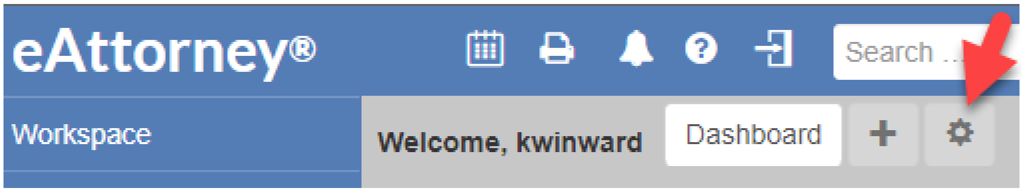
To edit a note, click the text of the note, make your edits, then click **[Update]**.

Recent reports gadget

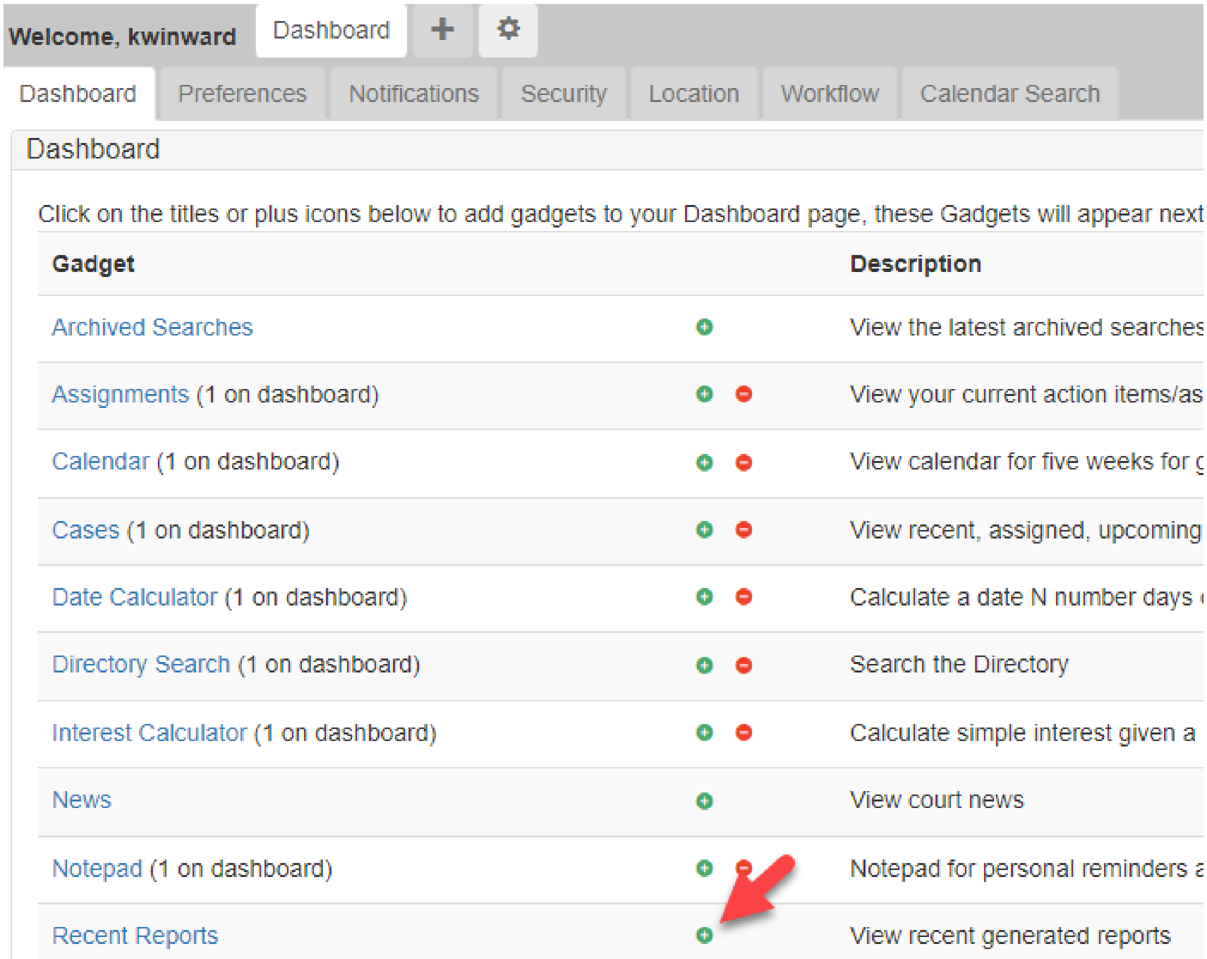
The **Recent Reports** gadget shows a list of recently saved PDF reports with an option to share them using email.

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:



Use the recent reports gadget

To use the **Recent Report** gadget, you must first Add the gadget to your **Dashboard**.

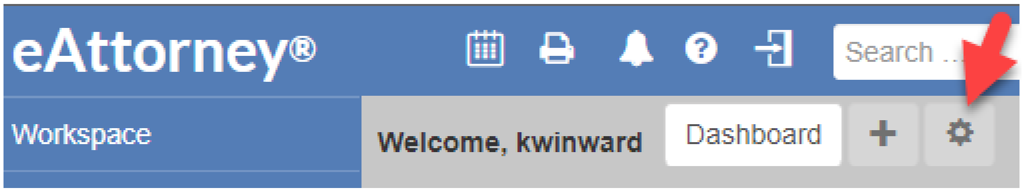
To share a PDF report, click the **envelope** icon next to a report.

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.

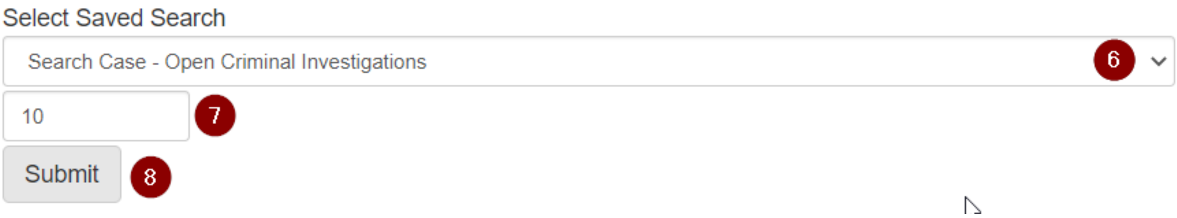
3. Click **[+]** next to the **Saved Search Results** item:

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]**.

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:

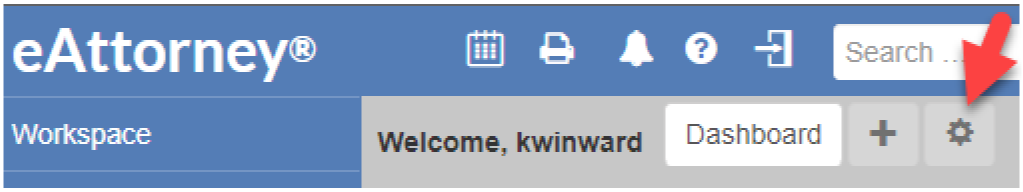
1. Quickly link to associated search results.
2. Execute actions:
    - Bulk schedule.
    - Export case events.
    - Join cases.
    - Cash receipts.

Saved search gadget

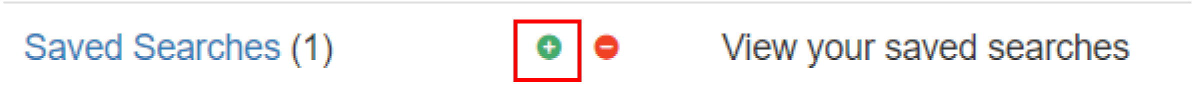
The Saved Searches gadget displays a list of saved searches with the option to quickly run or open them directly. The search can also be expanded to display the search parameters.

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:

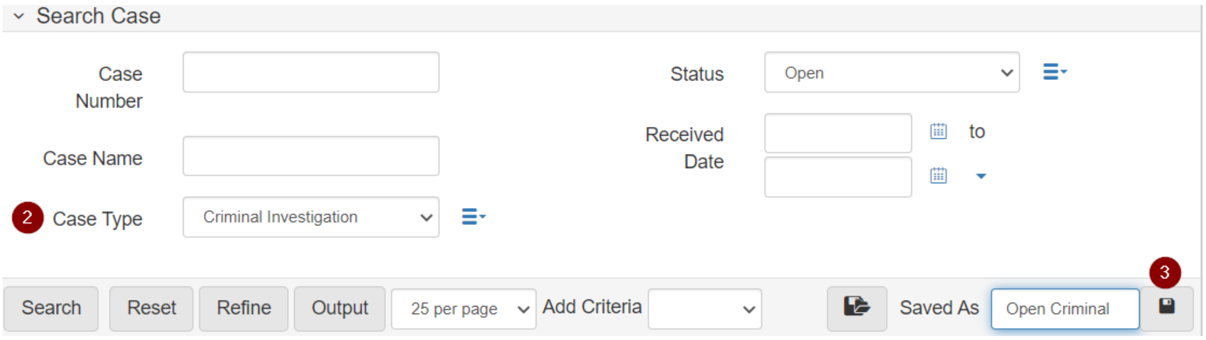


Add a saved search

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.



Use the saved search gadget

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

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.

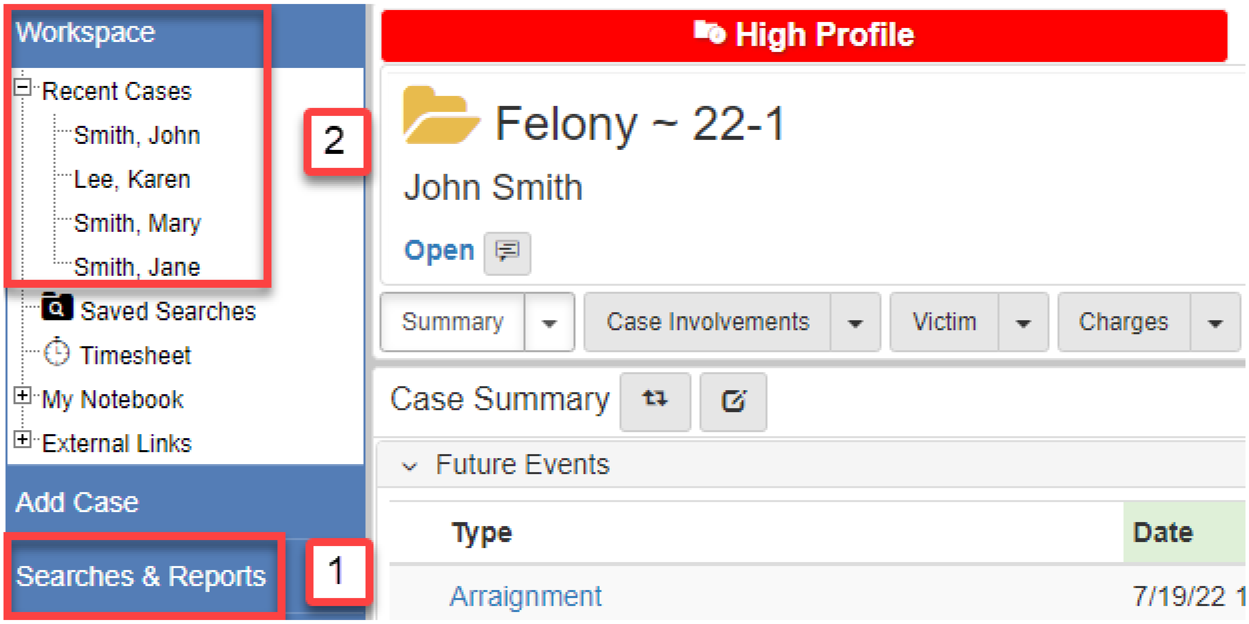
Case folder views

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:

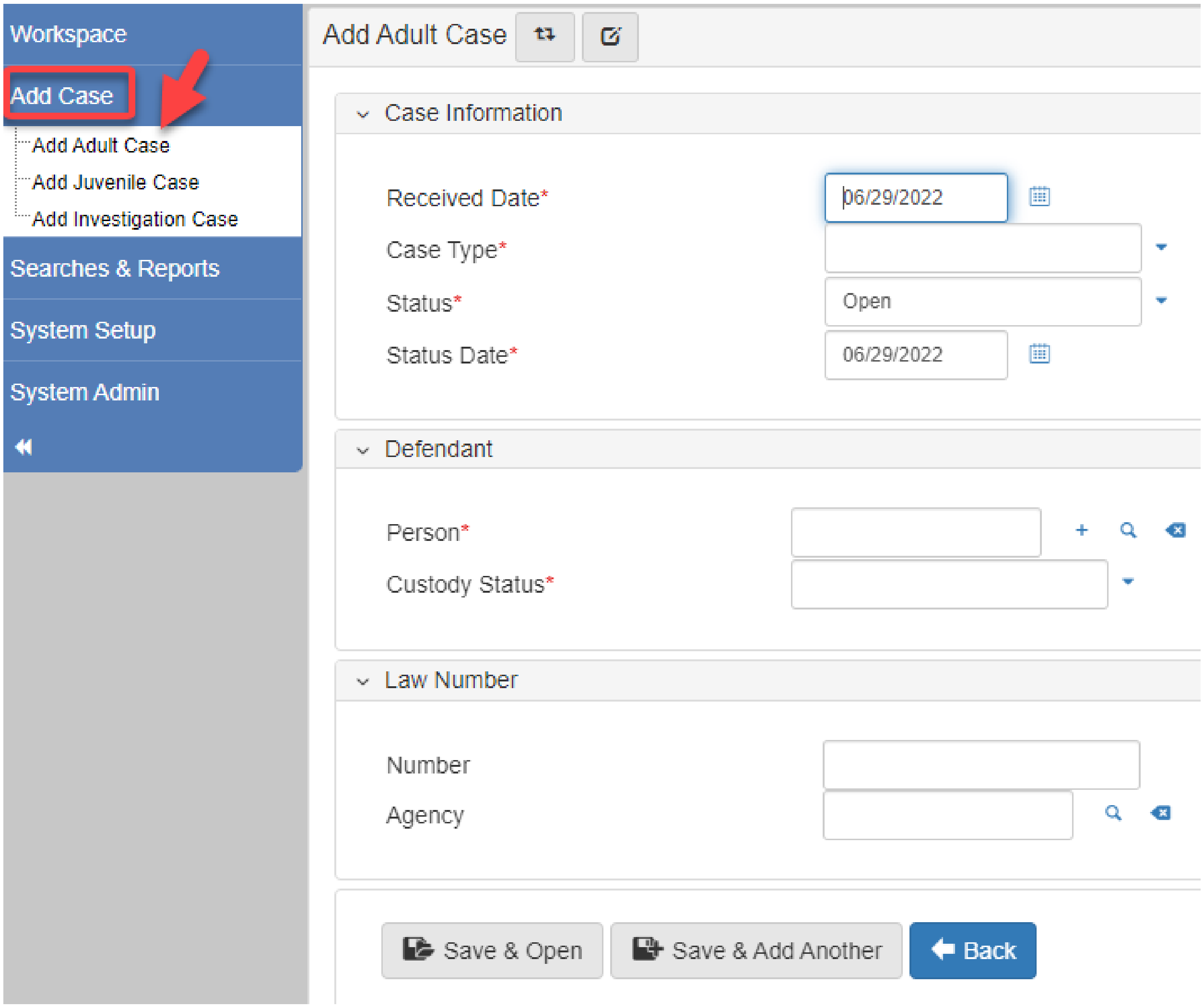
1. Through the case search found in the navigation bar under **Searches & Reports** › **Search Case** and filling out case information.
2. If the current user has assigned cases cases, the view pops up in **Workspace** › **Recent Cases** › **Select Case**.
3. Clicking the most recent case in the top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



Create a case

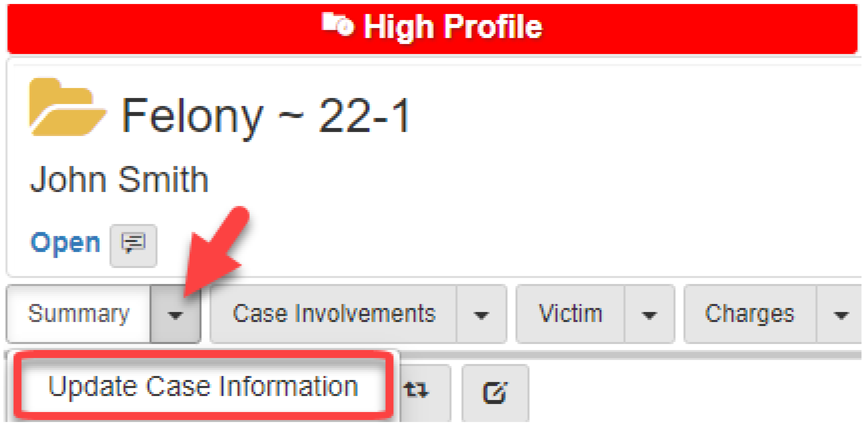
To create a case, navigate to **Left navigation** › **Add Case**, then select a case type.

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



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

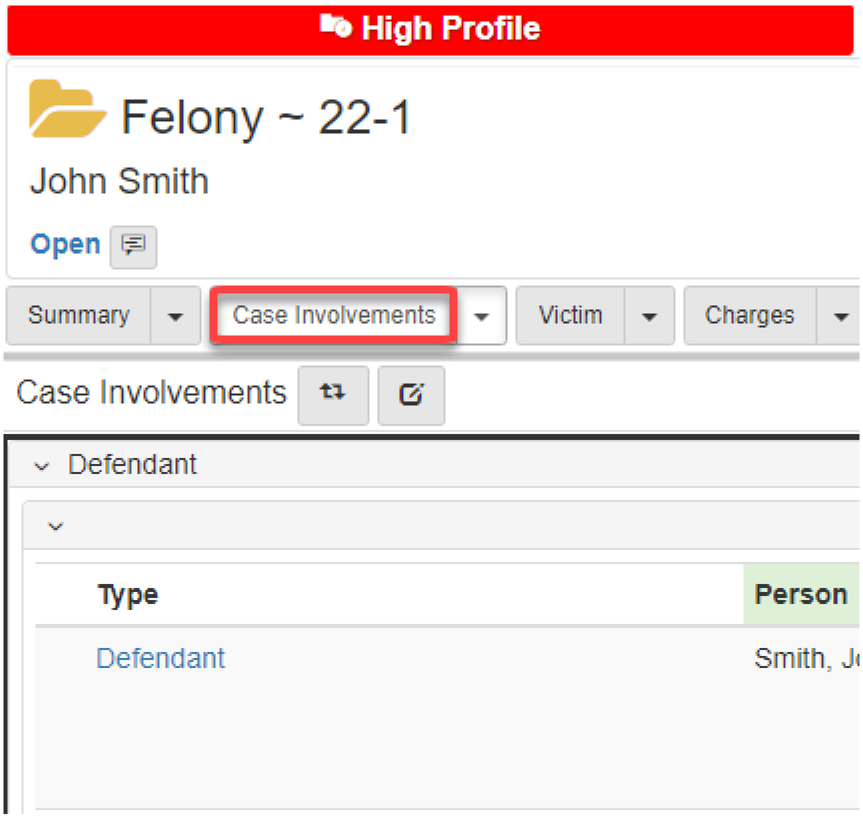
1. Status - Seal.
2. Start Date - Date seal goes into affect.
3. End Date - Date seal is removed (if end date is left blank case is sealed indefinitely).

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

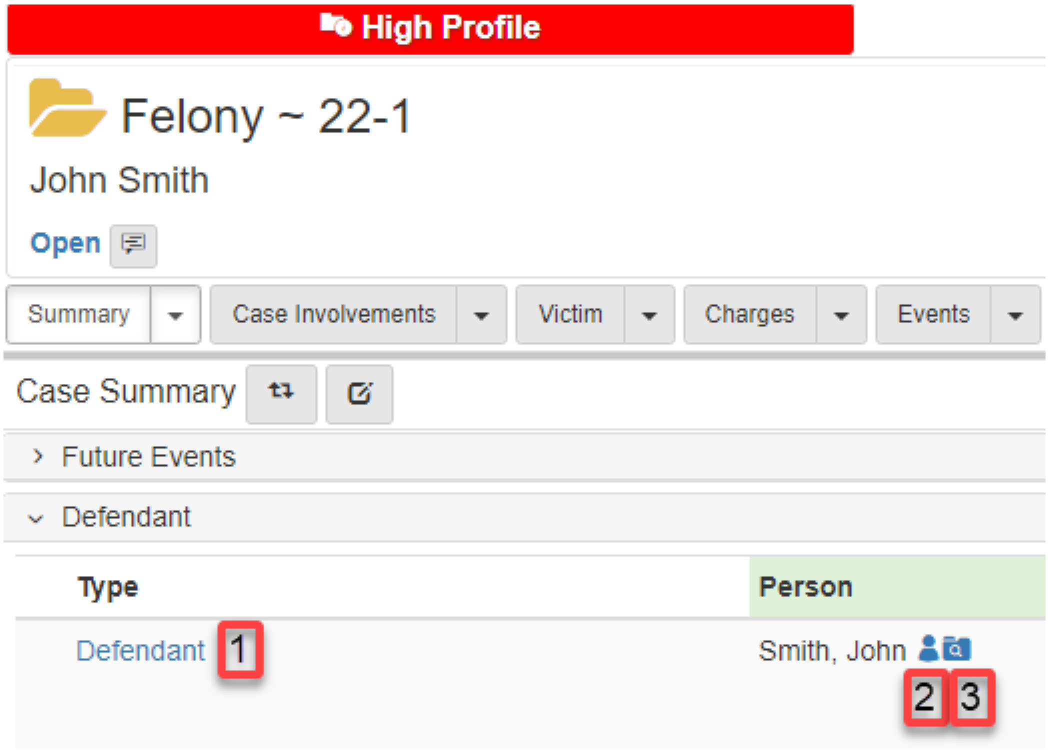
Case involvements

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.



Updates



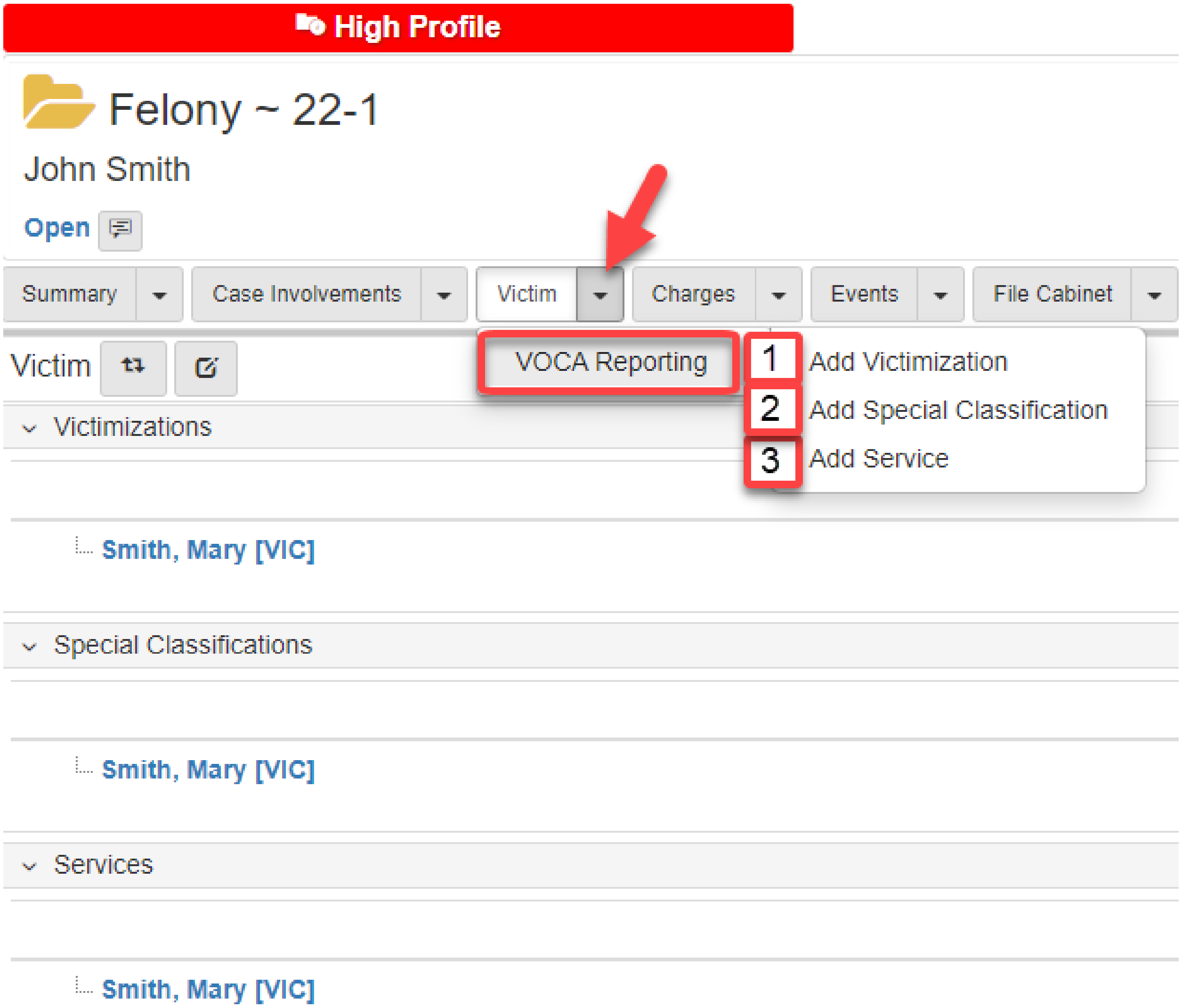
1. Involvements can be updated by clicking the involvement type, which displays the update screen where you can change the involvement type, person, status and more.
2. The person/directory person record can be seen by clicking the person icon.
3. Click the folder icon to display a dialog pop-up displaying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

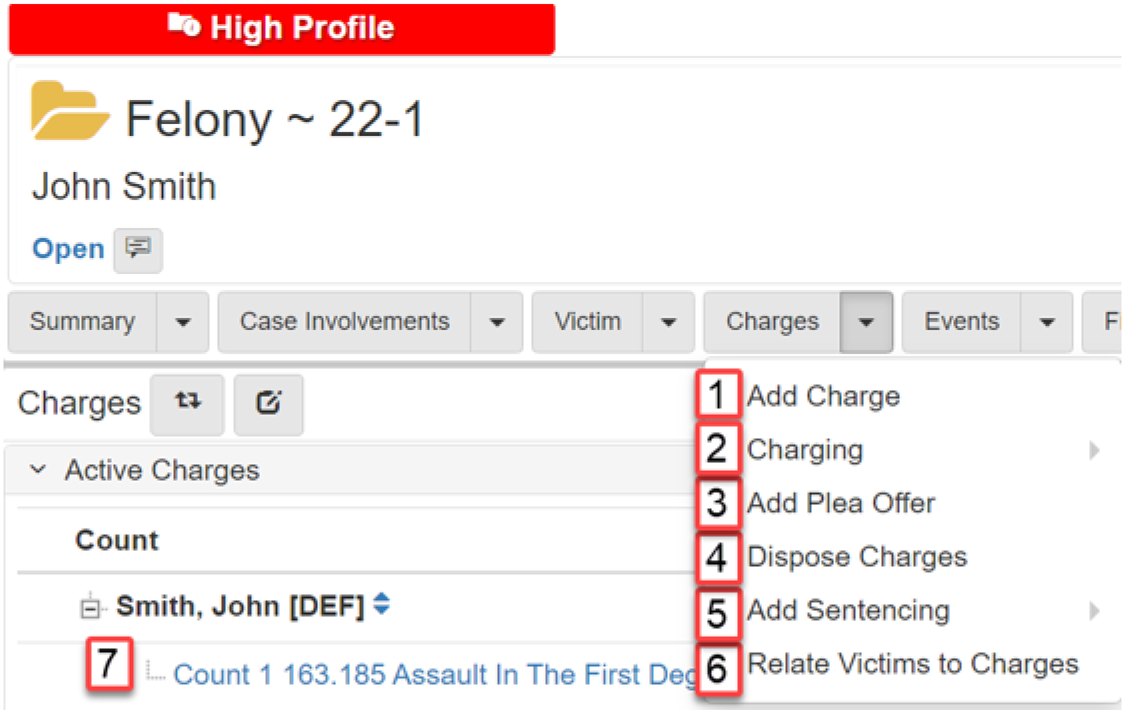
1. Add Victimization - Adds victimization type.
2. Add Special Classification - Adds special classification of victimization (for example Homeless, LGBTQ, Veteran, and others).
3. Add Service - Add service provided to victim.

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:

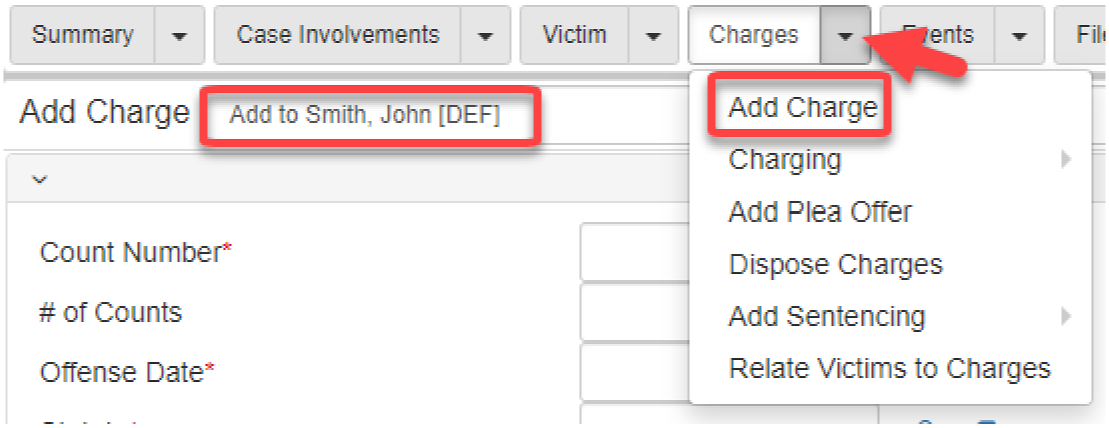


Other options can be selected from the **Charges** dropdown. The options include:

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.



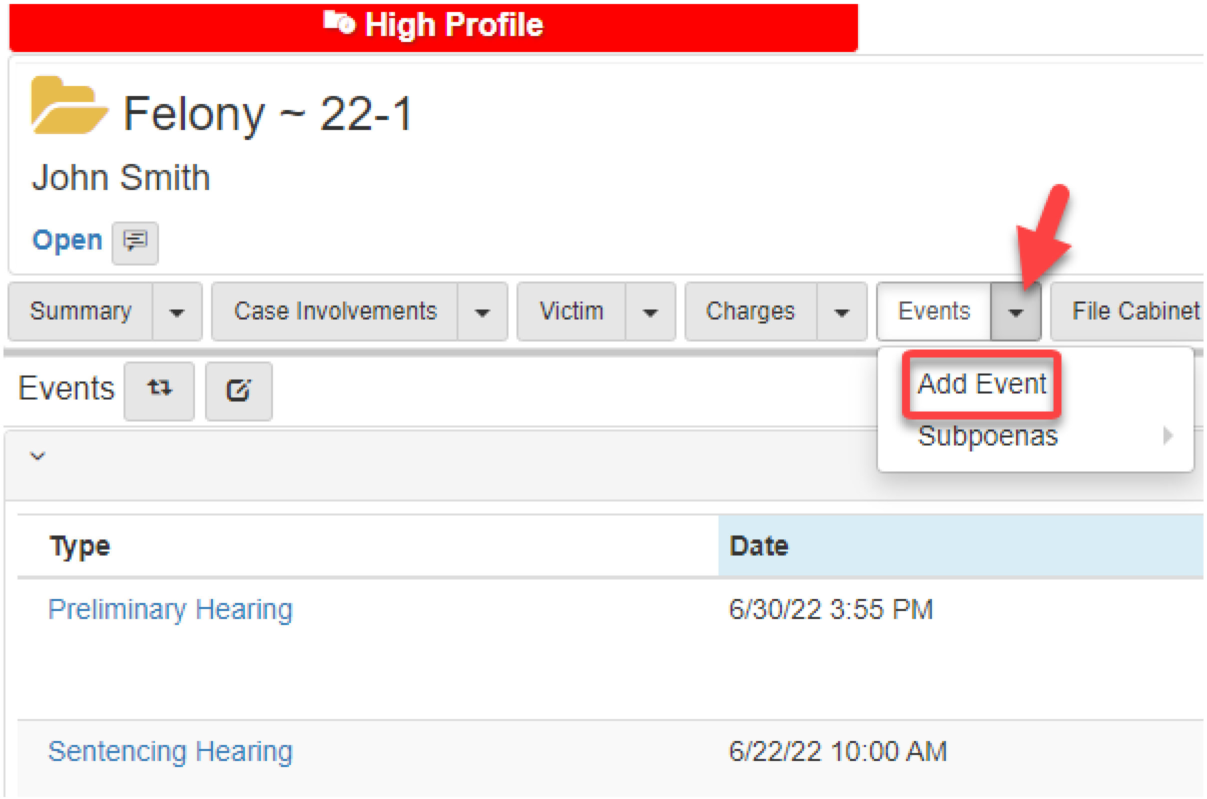
Events

Events can be accessed by clicking the Events tab in 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.

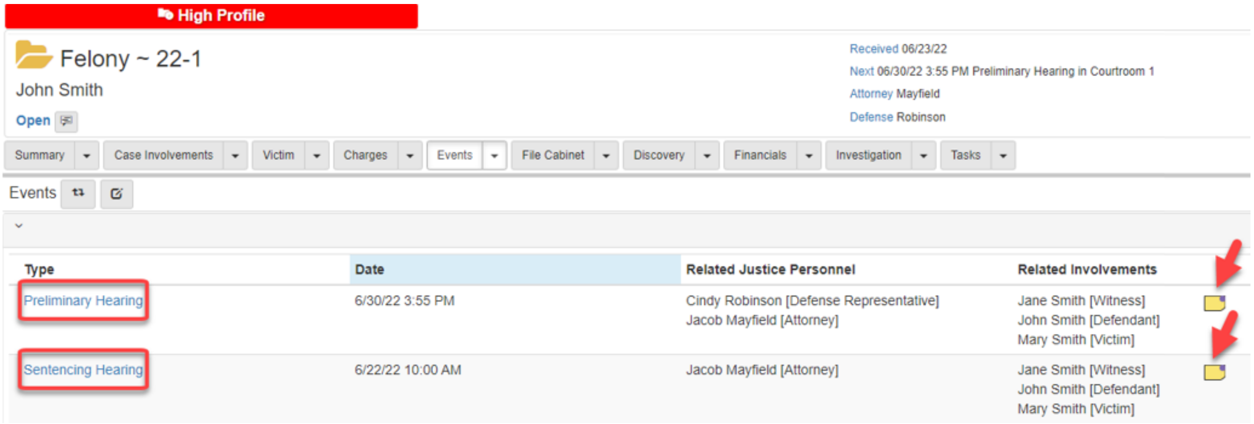
To add an event:

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



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.

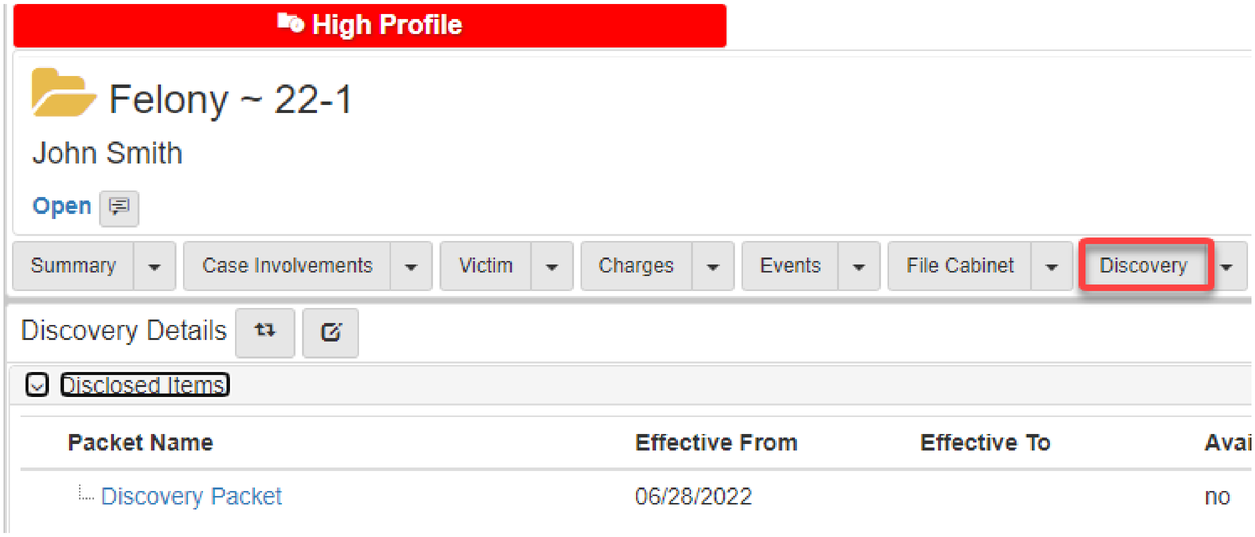


Notes added to each event are also added to the case notes. Edit an event by clicking the

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.



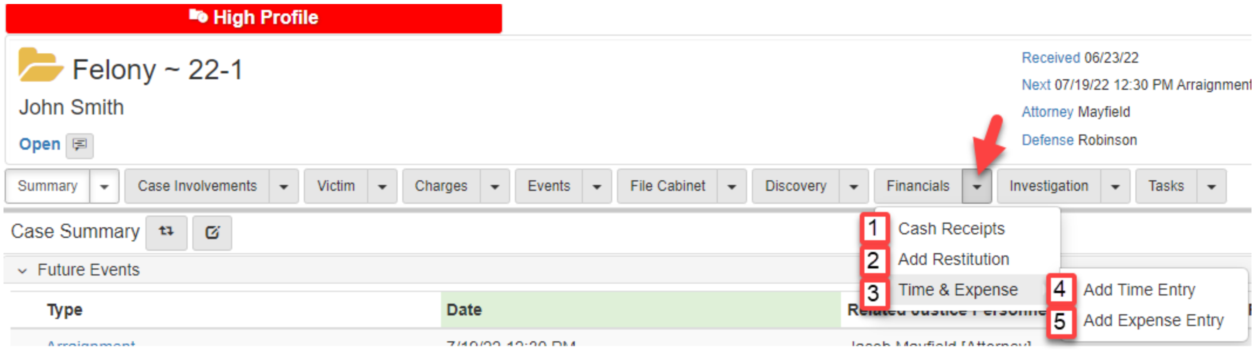
For more information on how to navigate to the case summary screen, see https://documentation.journaltech.com/eAttorney/user/cases/index.html.

For information on creating discovery packets, see Create.

For information on discovery packets, see Discovery packets.

Financials

Case financials consist of three different screens:



1. Cash Receipts.

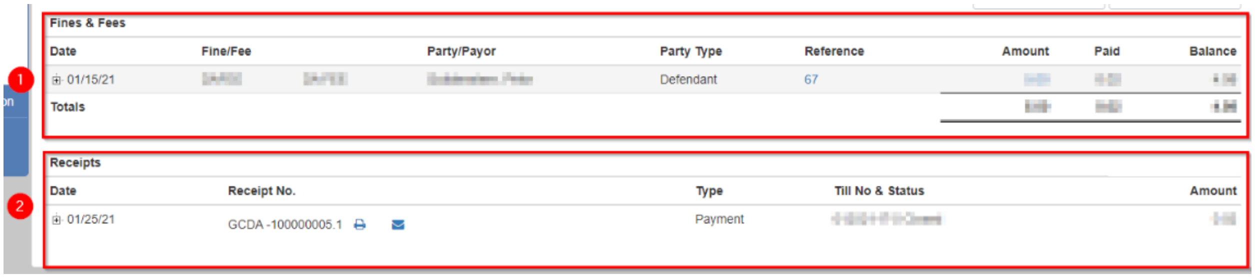
2. Case Ledger.
3. Historic Financials.

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

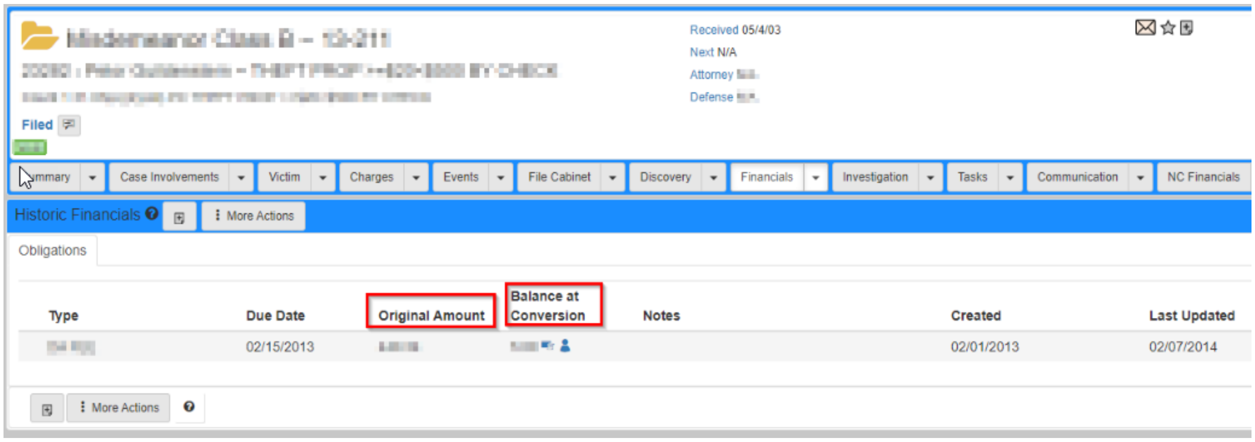
In this section, individual receipts can be printed and emailed to individuals.



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).



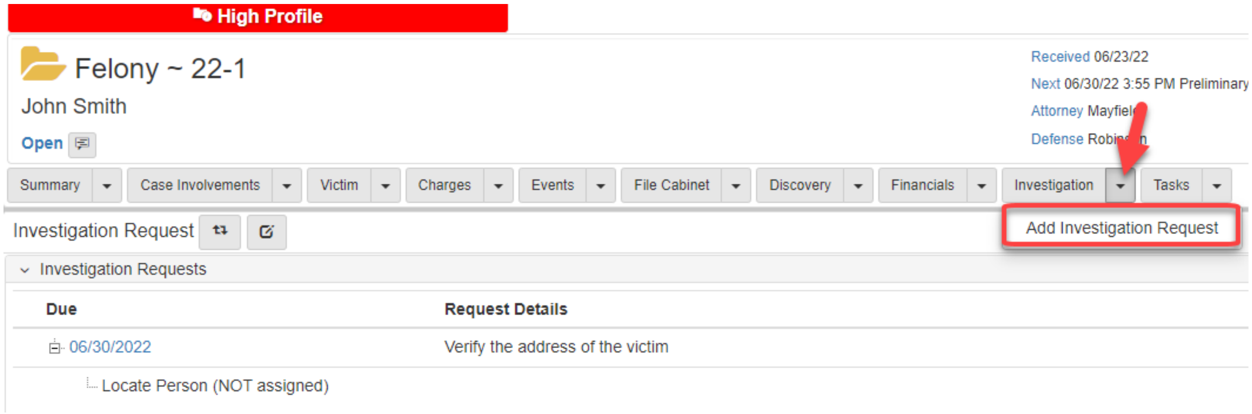
Investigation

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.

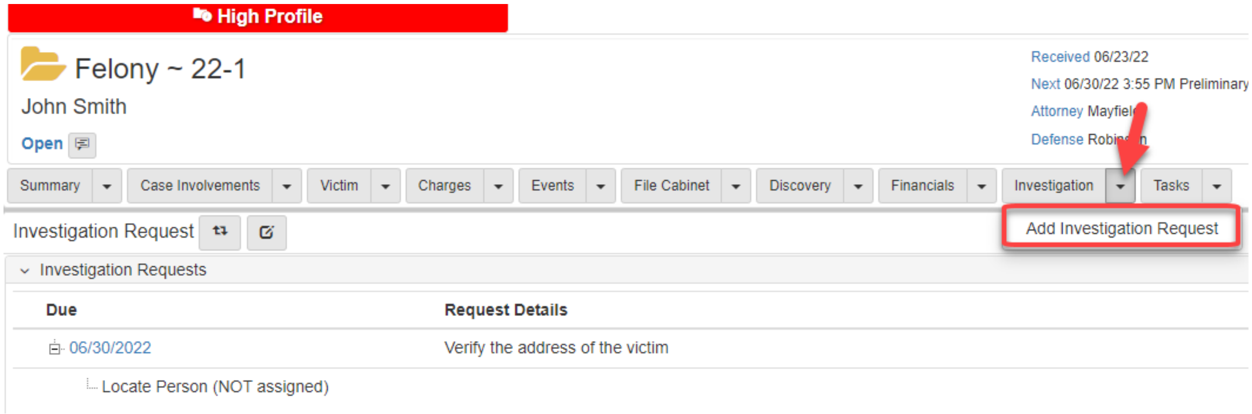
For information on navigating to the case folder view, see https://documentation.journaltech.com/eAttorney/user/cases/index.html.

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.



Add an investigation request

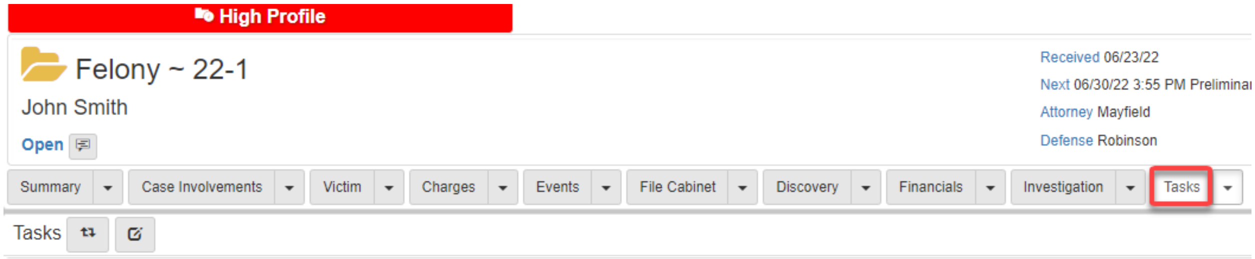
Requests can be added by clicking the **Investigation** dropdown, then selecting **Add investigation request**. All fields denoted with a red asterisk are required. Adding a task to the request is optional.



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

Tasks

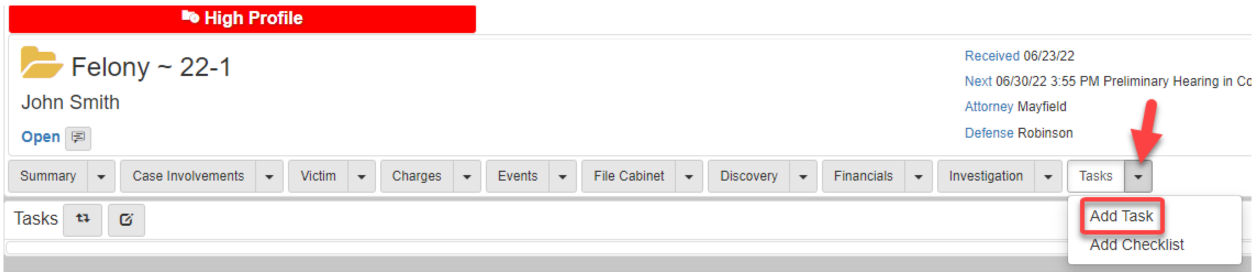
Tasks can be added to a case and assigned to an individual. To navigate to the tasks from the case view, click the **Task** tab:



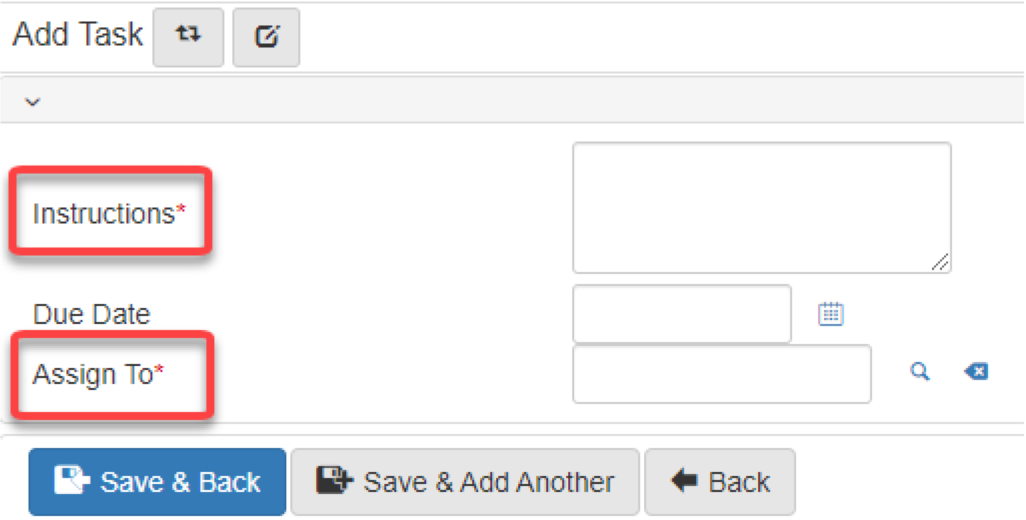
For information on how to navigate to the **Case View**, see https://documentation.journaltech.com/eAttorney/user/cases/index.html.

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:



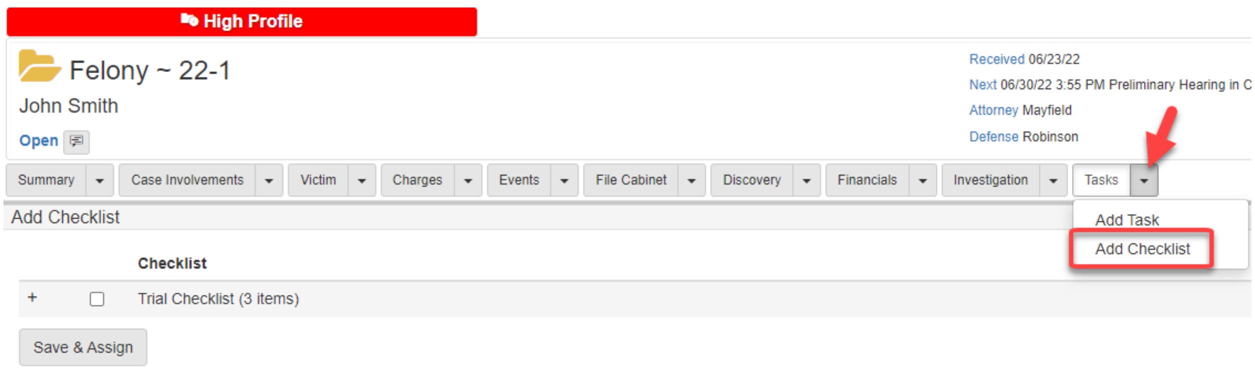
Updating the assignment also updates the assigned user in the workspace. You can also update the assignment from the workspace. When complete, select **complete** to remove the workspace item, or use the **Done** result from the workspace.

Checklists

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

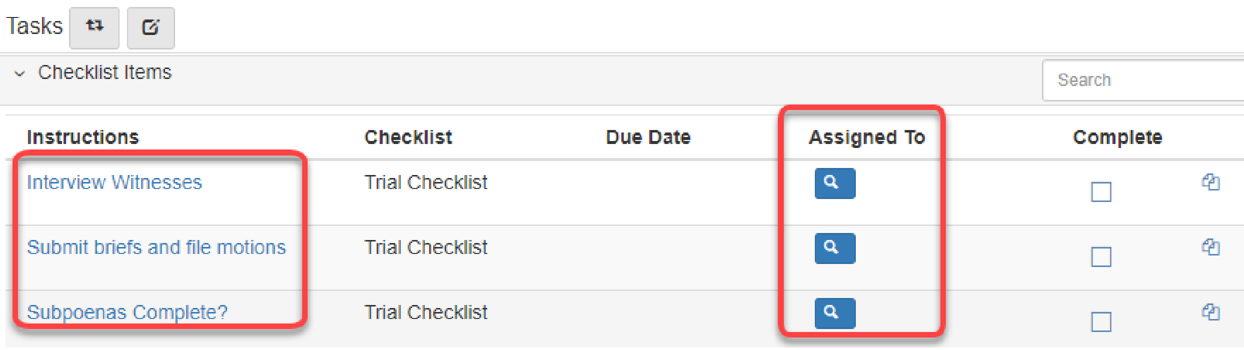
Add a checklist

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



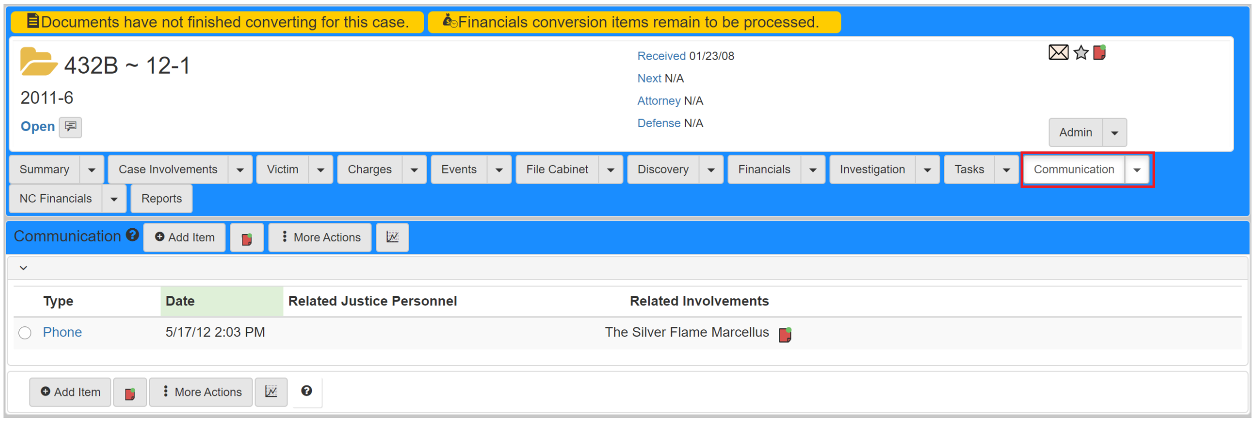
Use the **Add Checklist** screen to select all the checklist items or elements to add. Checklists do not allow duplicate items to exist on a case.

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.



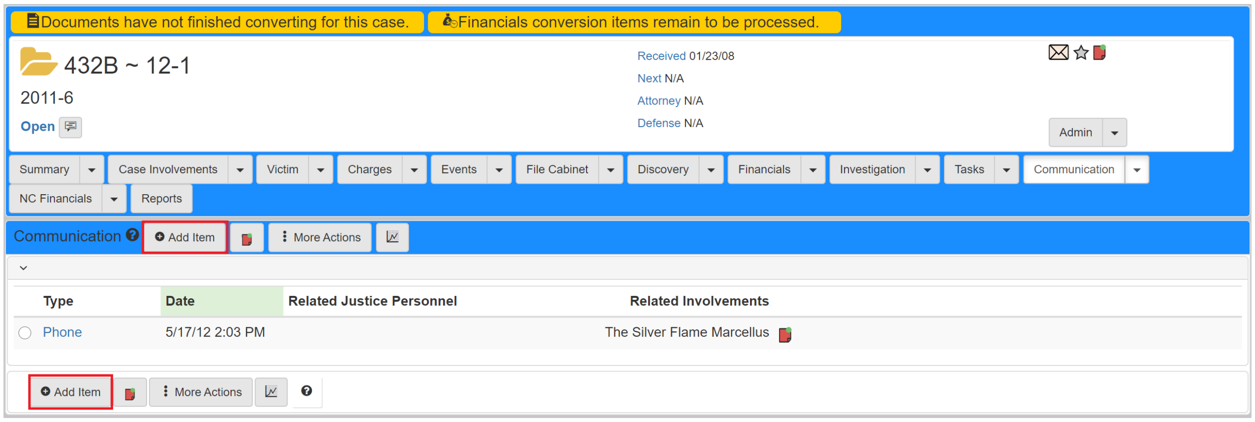
Communication

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



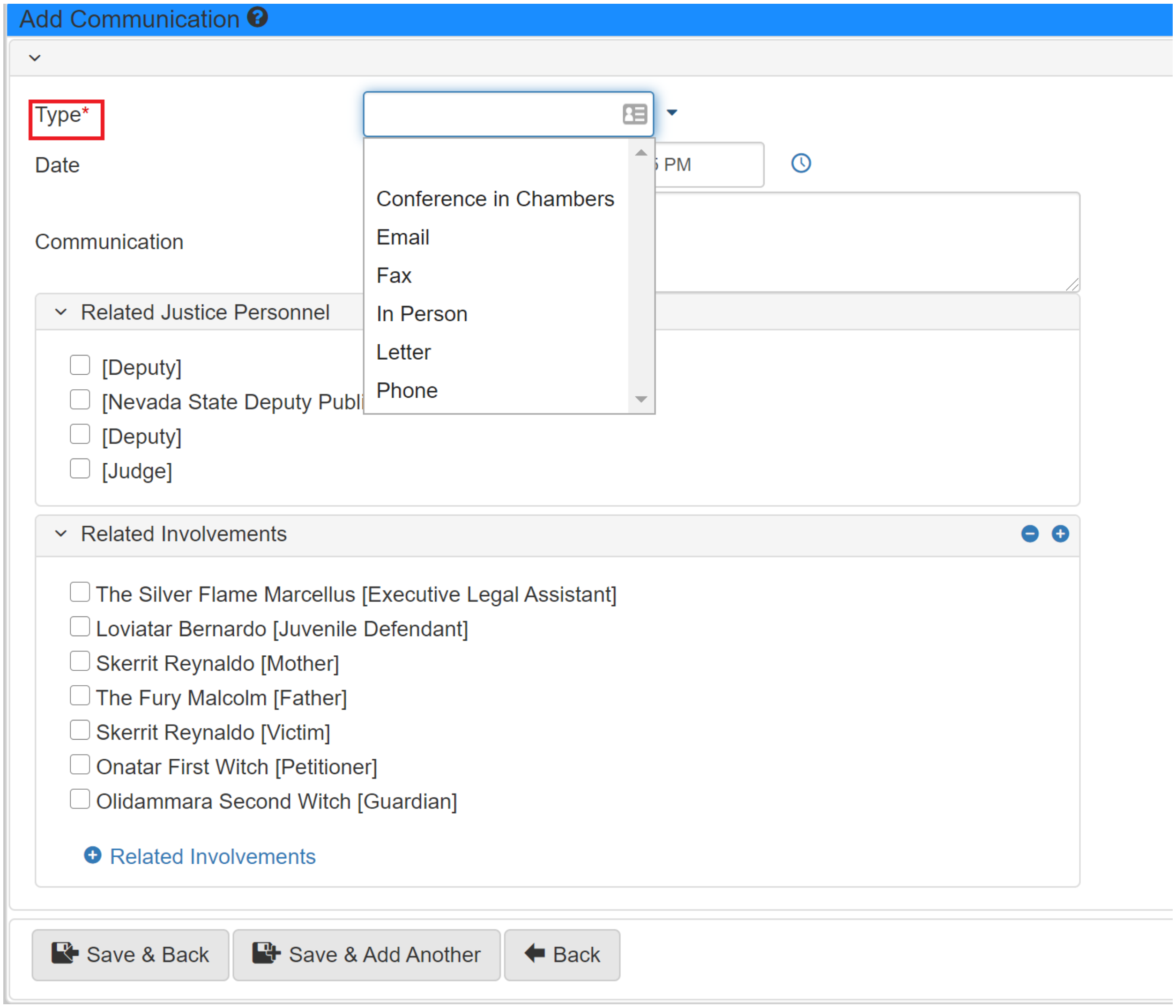
For information on how to access the case view, see https://documentation.journaltech.com/eAttorney/user/cases/index.html.

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:



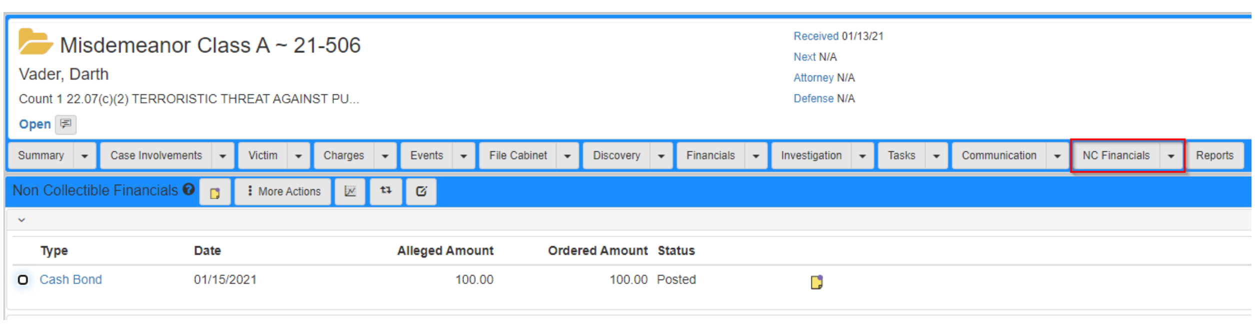
Add item

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:



Non-collectible financials

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

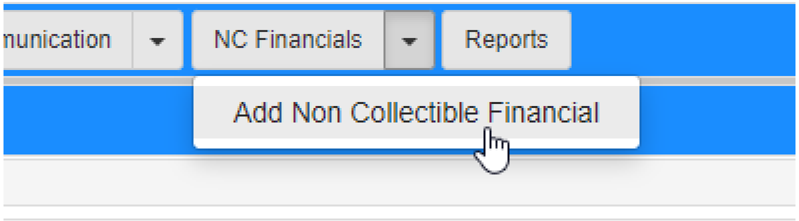


The **Non-collectible Financials Folder View** can be accessed on the **Case Folder View** by clicking the **NC Financials** tab. For information on navigating to the case folder view, refer to https://documentation.journaltech.com/eAttorney/user/cases/index.html.

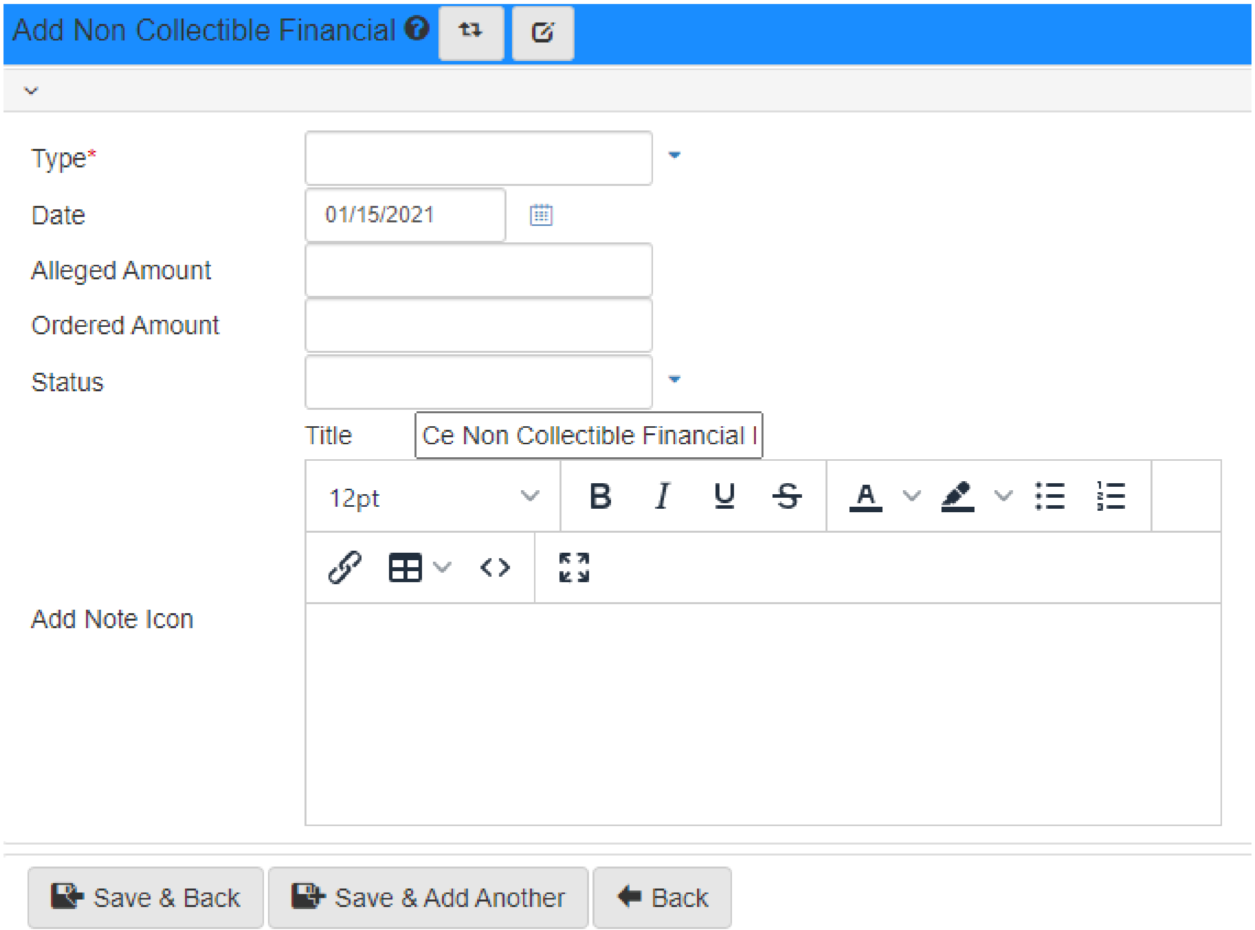
Click a value in the **Type** on a row to edit that non-collectible financial.

Add a non-collectible financial

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

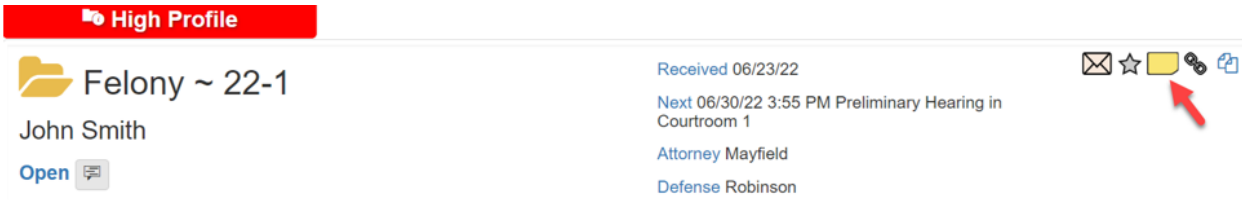


All fields with a red asterisk are required.

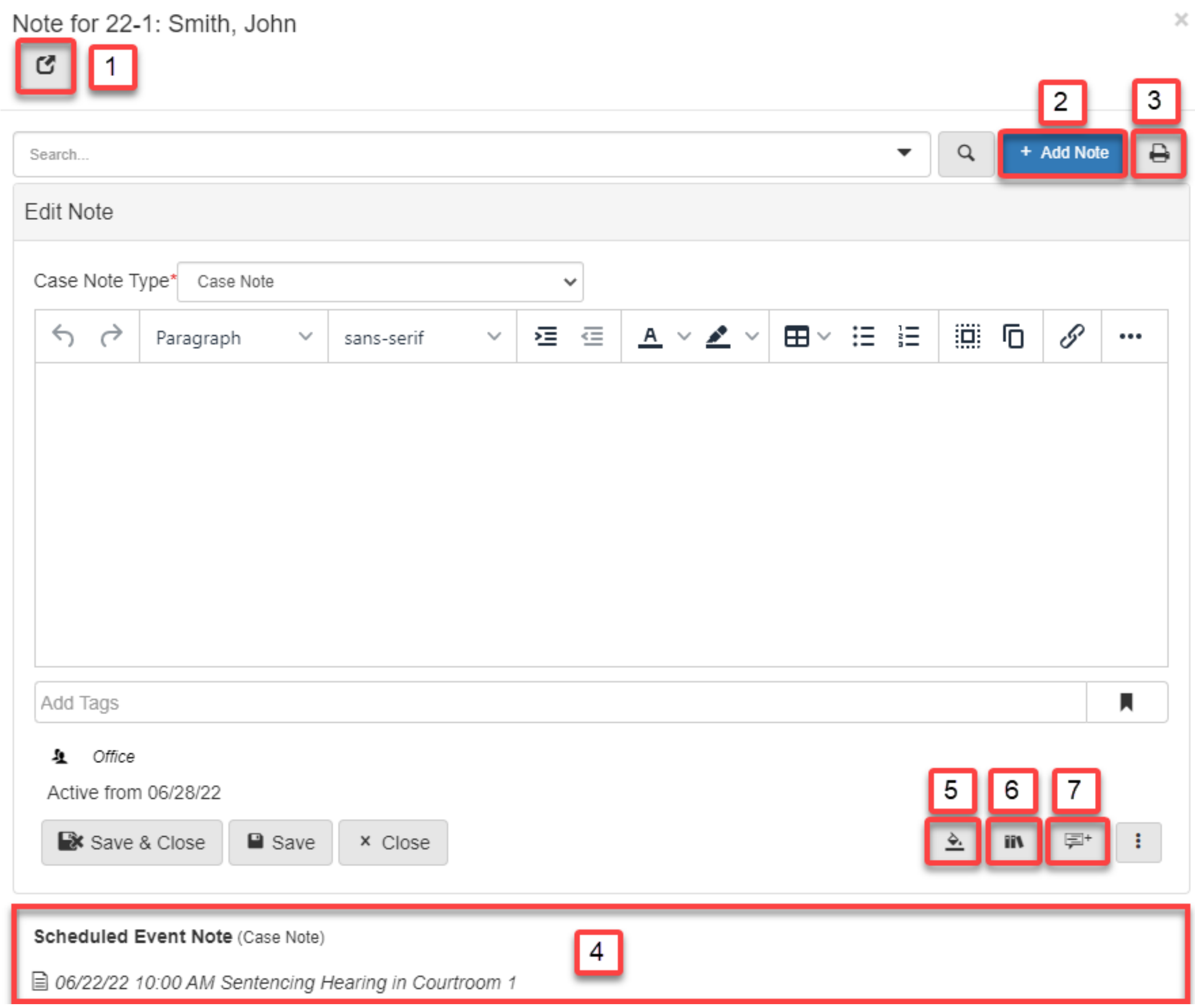


Case notes

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:

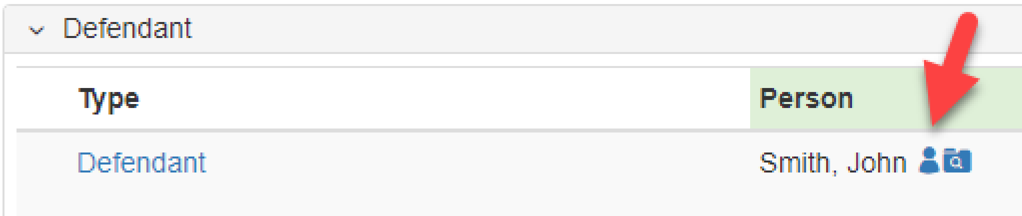


1. Closes dialog and launches case notes in a new browser tab.
2. Adds a new note on case.

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:



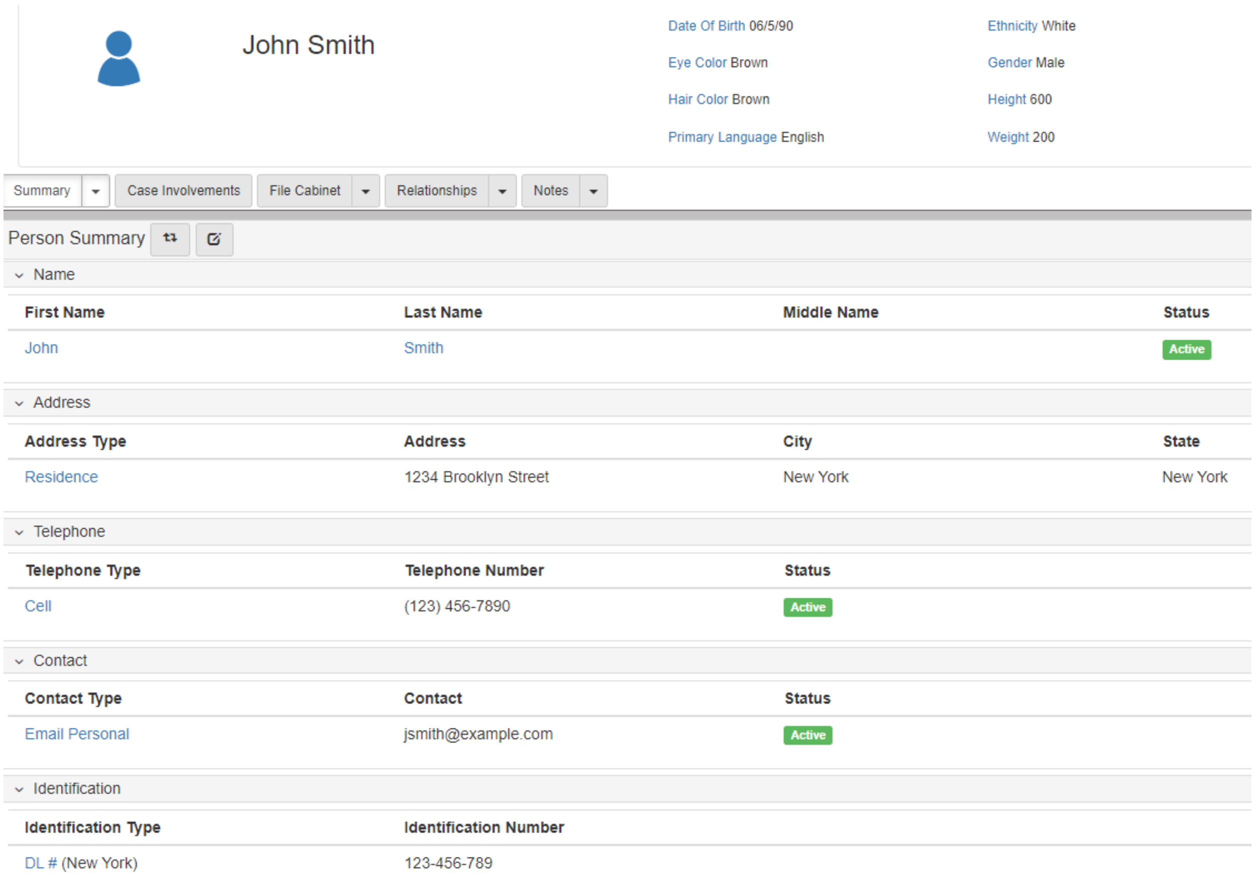
A directory person is denoted by a double-person icon:

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:

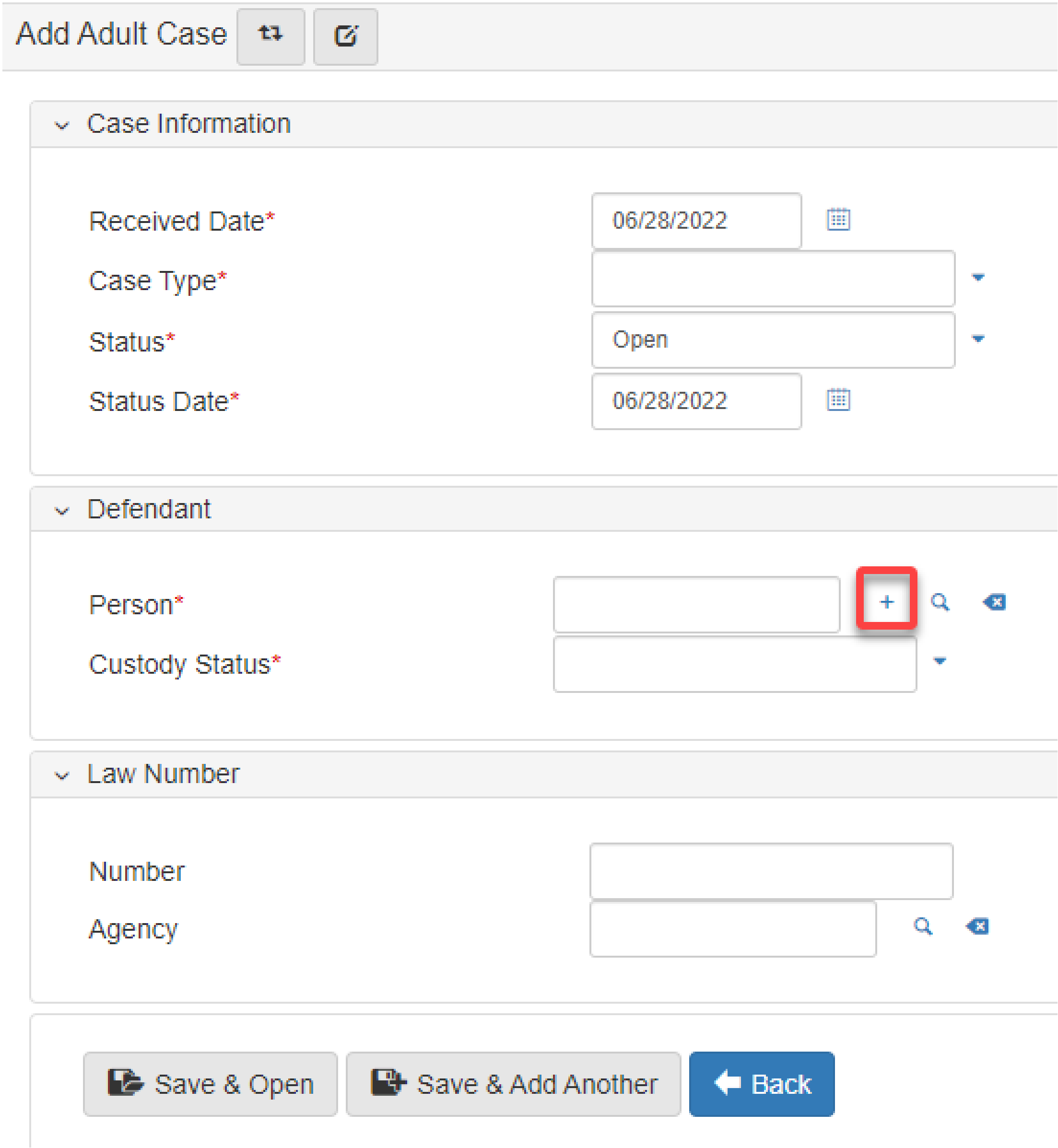
1. Summary - Gives basic information on the selected individual, for example First Name, Last Name, DOB, and Address.
2. Filing cabinet.
3. https://documentation.journaltech.com/eAttorney/user/person/relationships.html.
4. https://documentation.journaltech.com/eAttorney/user/person/historical_financials.html.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

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

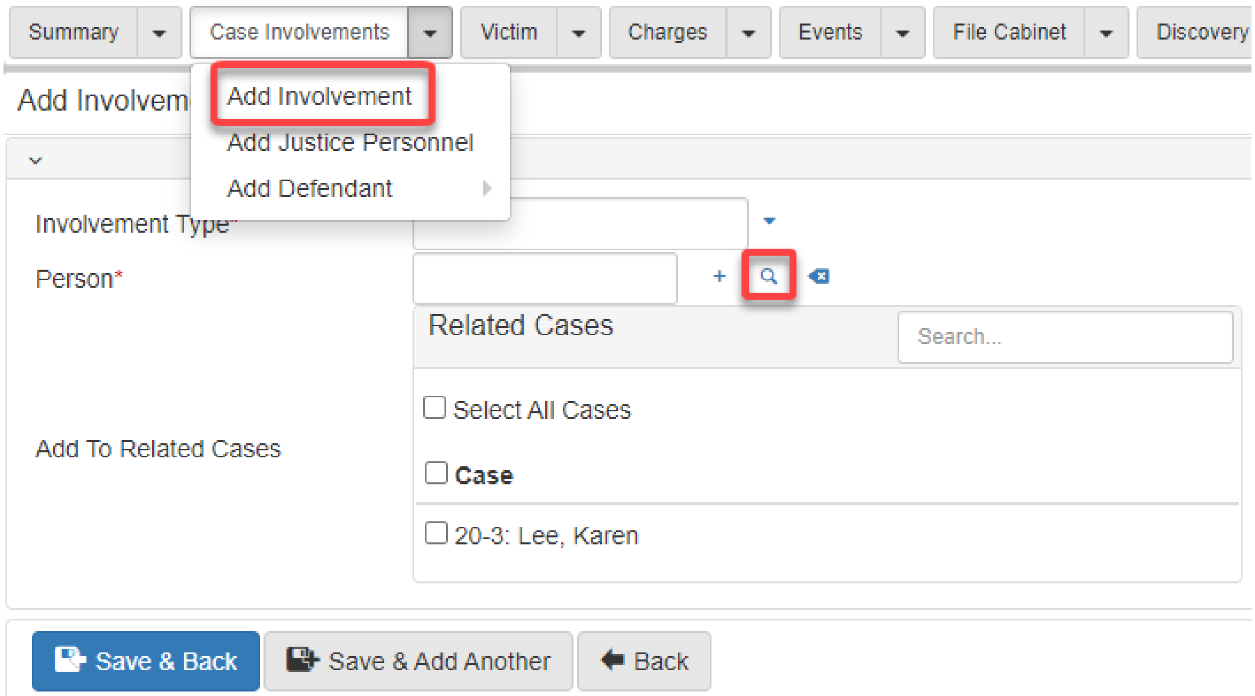


Create

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



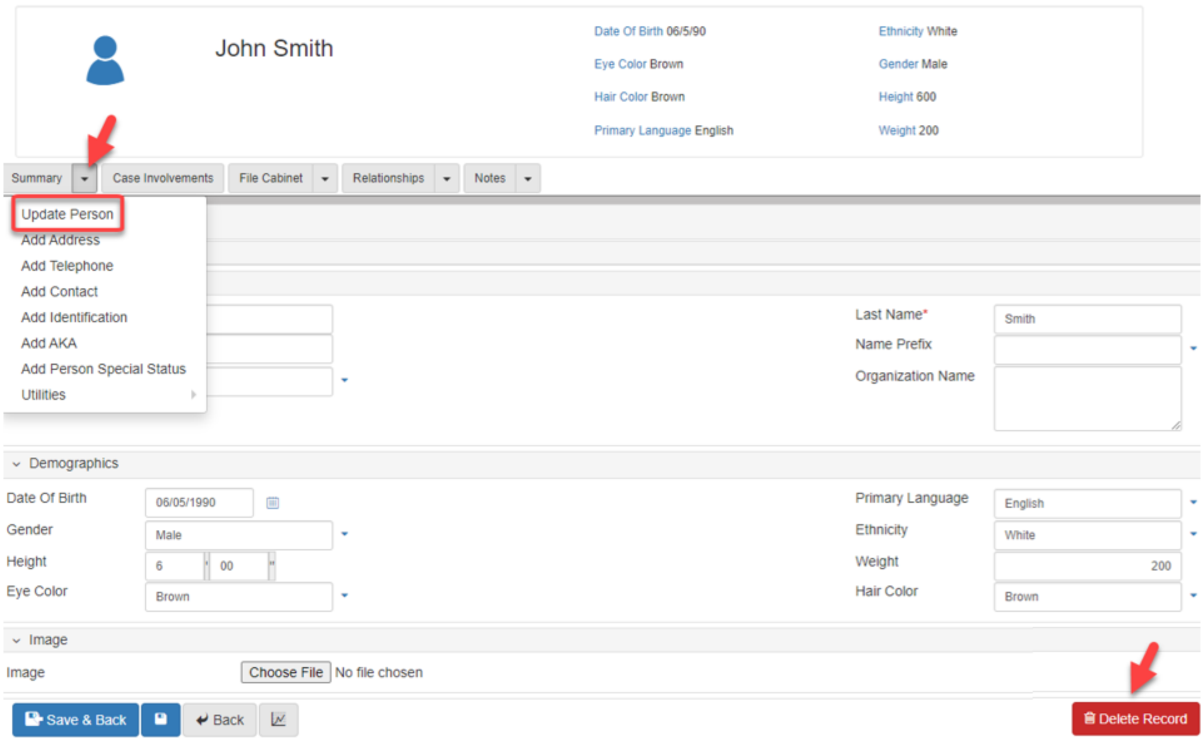
After saving, you can add a **Person** to cases. Click the **Search** icon and find the stored person:



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:

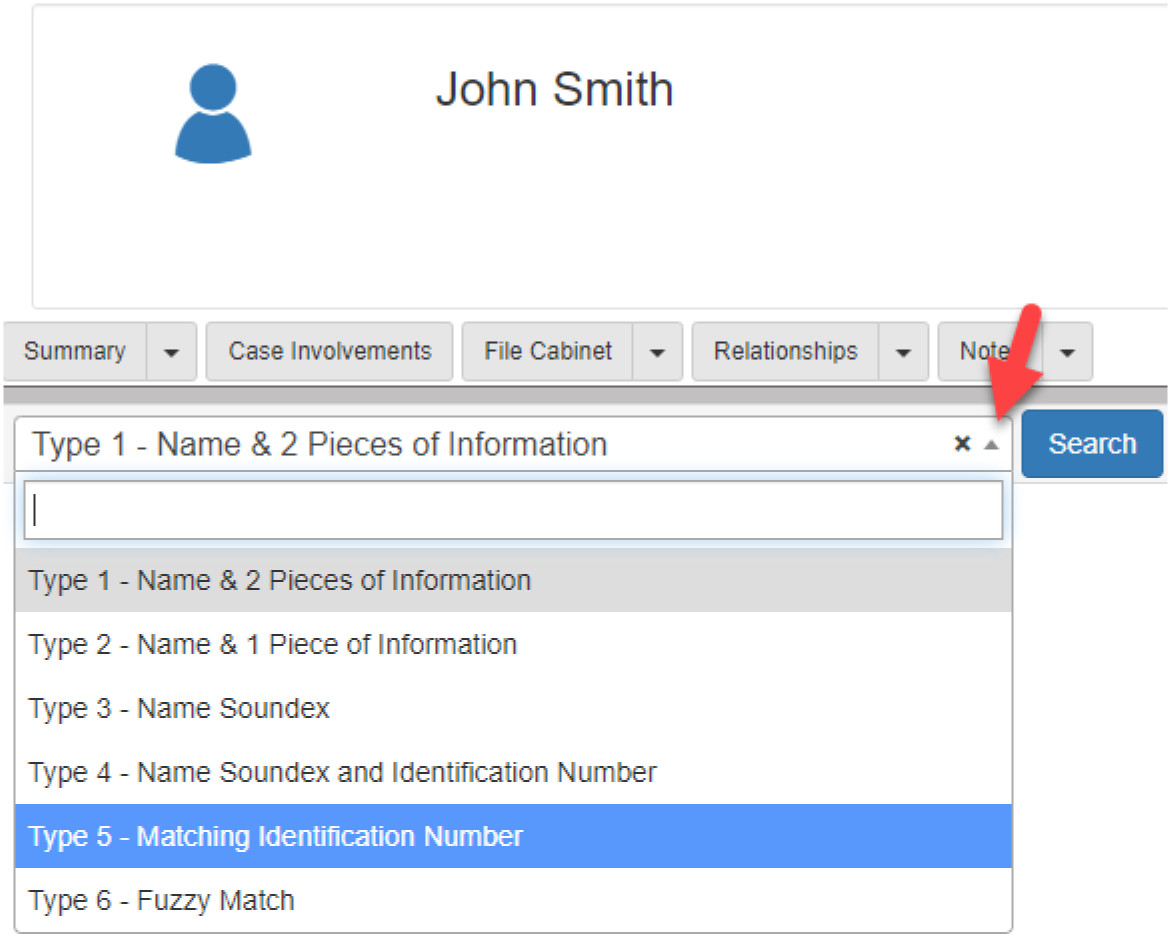


Merge

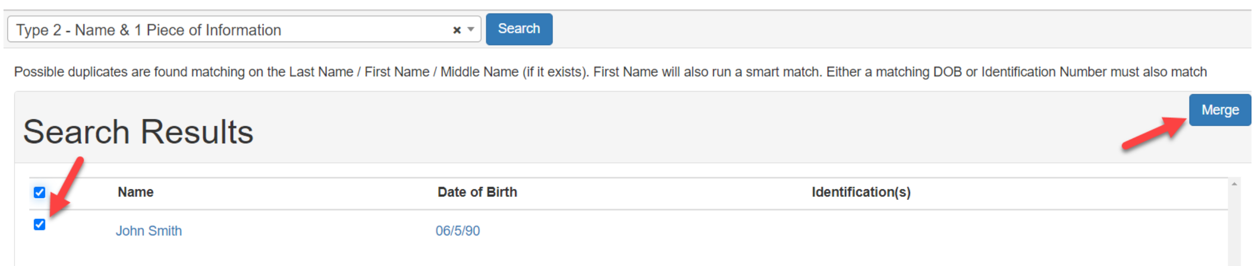
When multiple records of the same person exist in the system, those records can be merged into one person record. Merging person records can be done in the person folder view, under the **Summary › Person Merge**. To merge person records, a search level needs to be set to match potential duplicate records:

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.

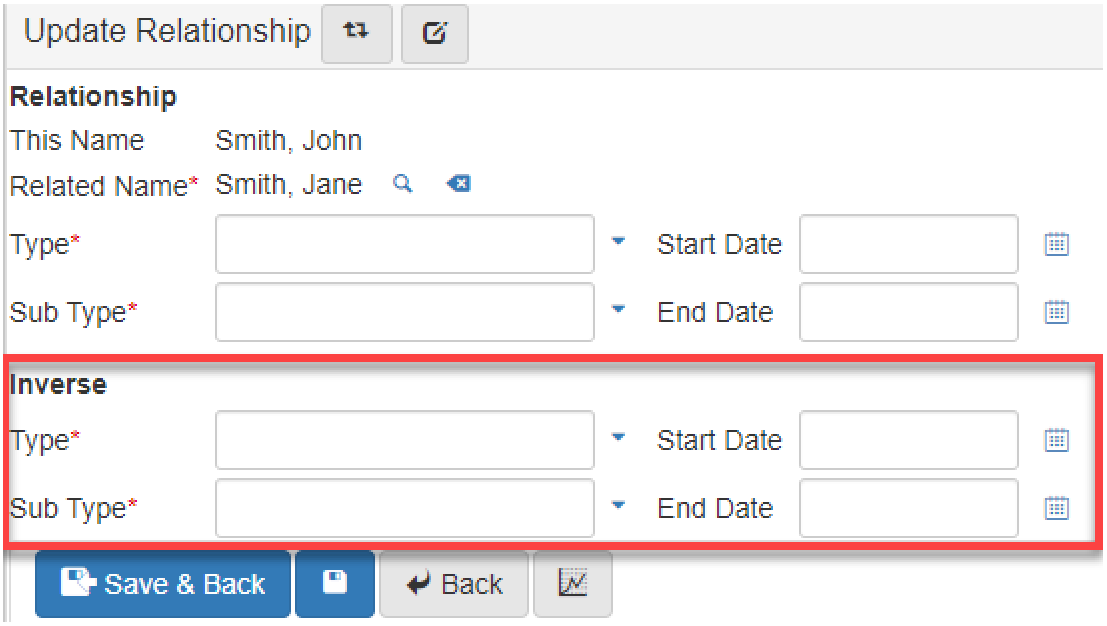
Show the **Historical Financials** screen by clicking the **Historic Financials** tab in the **Person Folder View**. For information on how to navigate to the **Person Folder View**, refer to https://documentation.journaltech.com/eAttorney/user/person/index.html.

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.

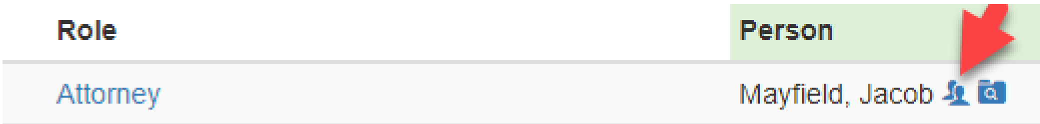


Summary

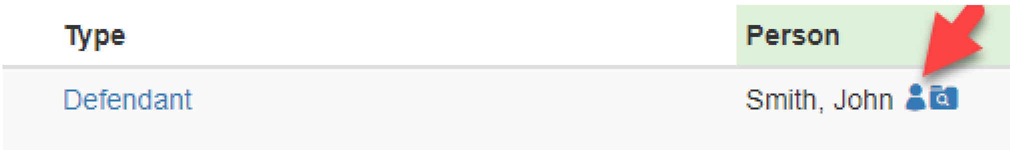
In eAttorney, there are two types of people:

- *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:



A Person is denoted by a single person icon.

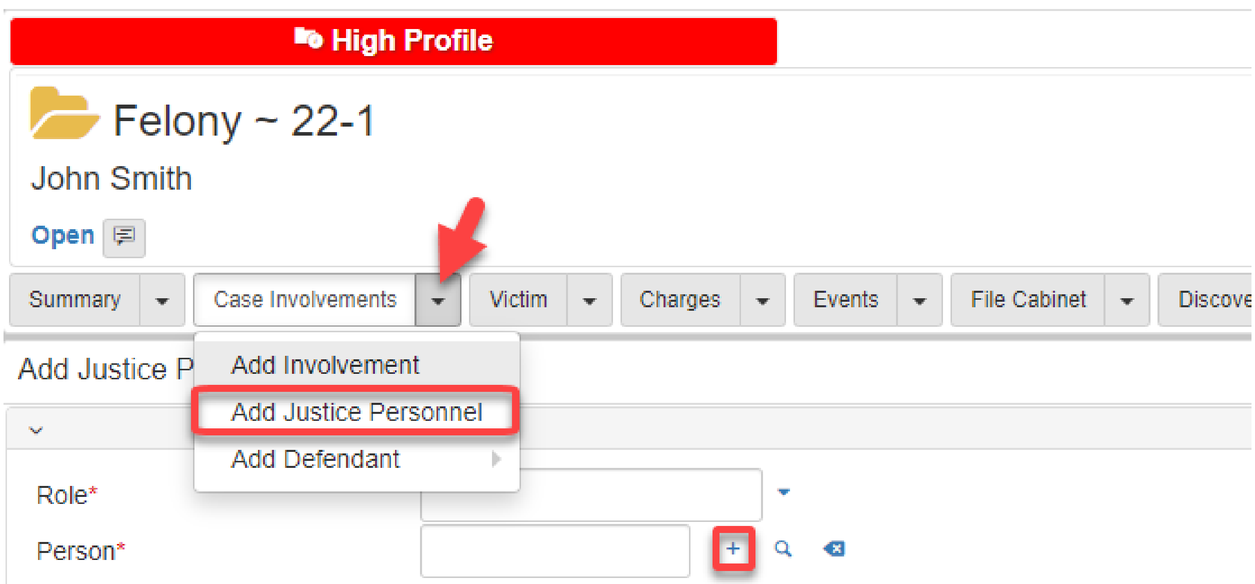


A Directory Person is also able to be assigned to cases. If a Directory Person is assigned to a case, the case shows in the user work space where they are able to see details and tasks on the case.

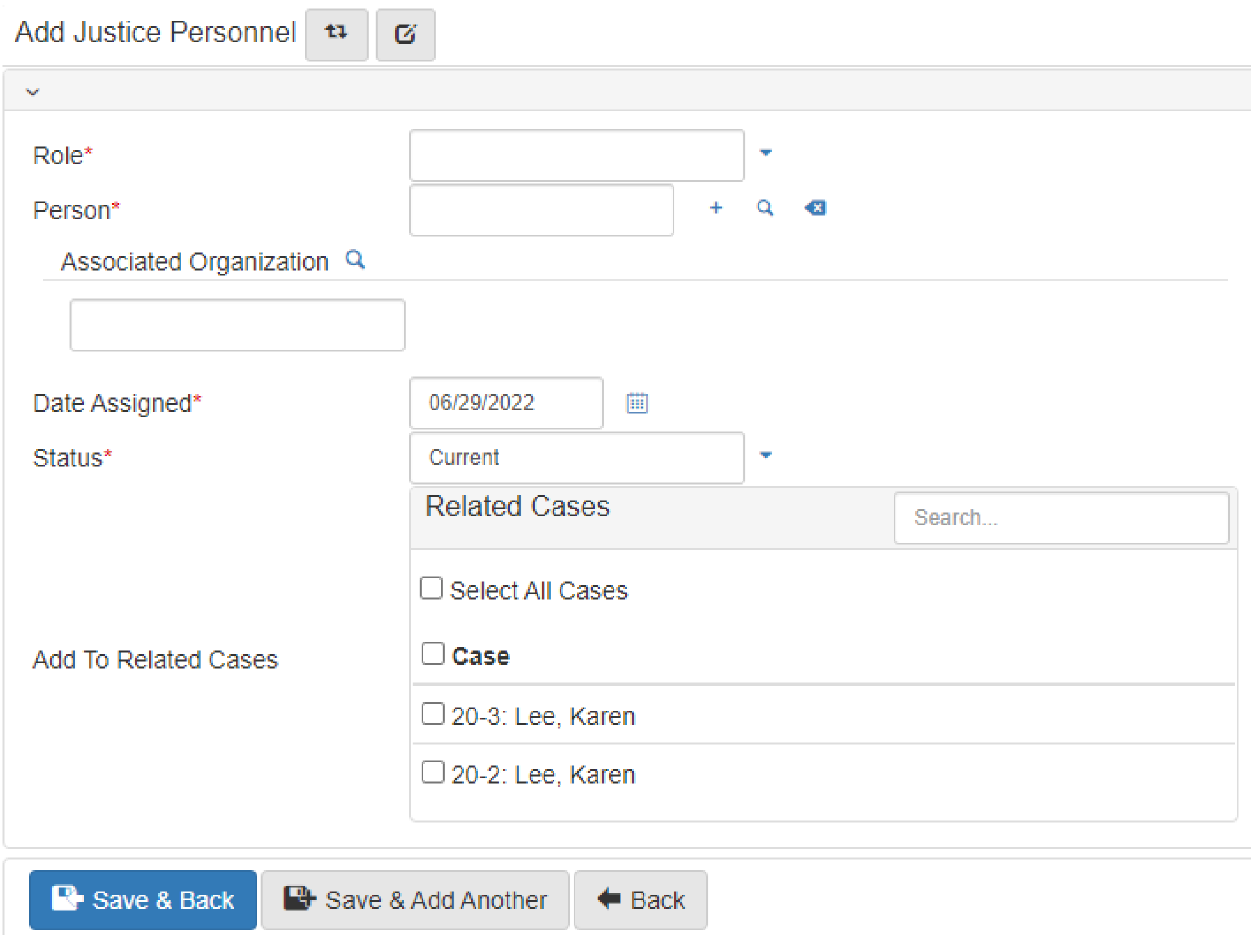
To access the Directory Person folder view, click the double person icon on a case, or use **Search Justice Personnel** in the search menu in the left navigation pane.

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:



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



Update

To update a directory person record:

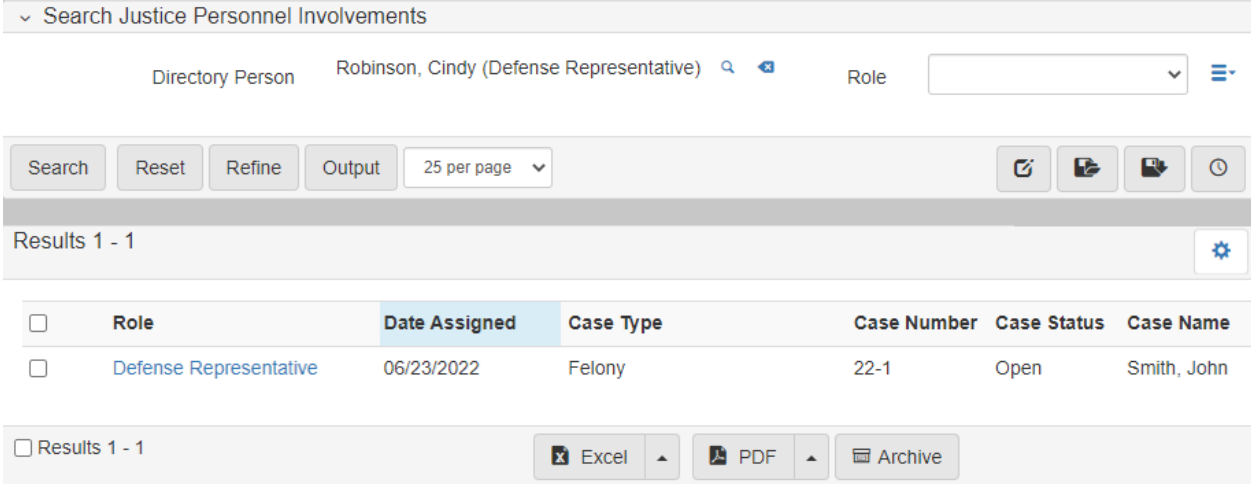
1. Navigate to the **Directory Person Folder View**.
2. Click a directory person.
3. Click the **Summary** dropdown, then select **Update Directory Person**.

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.

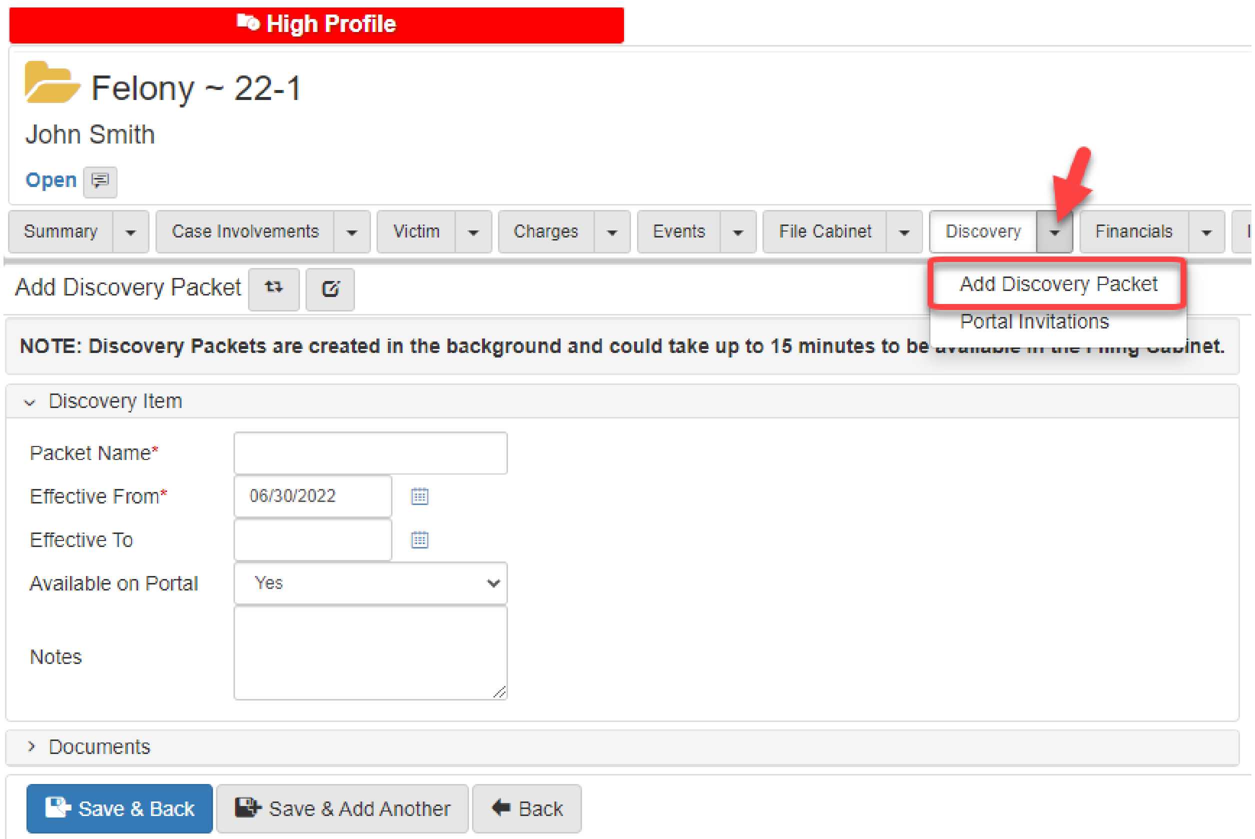


Discovery packets

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**.



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 than 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.

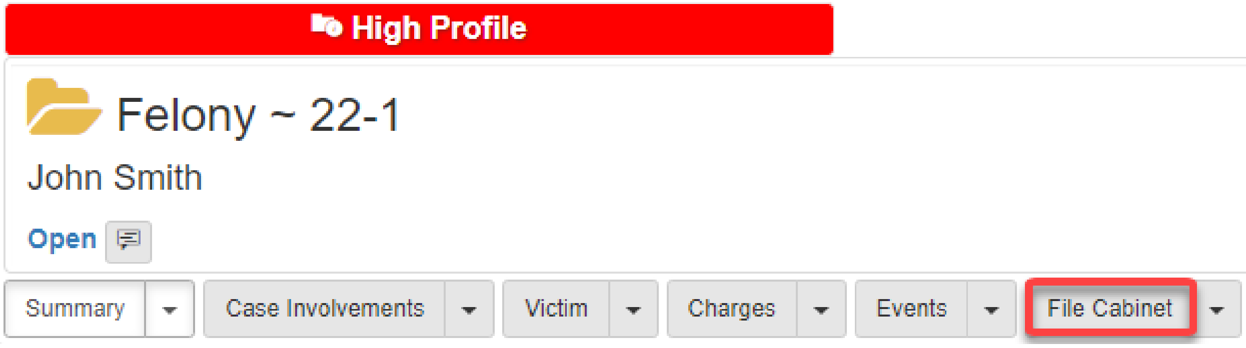
Document scanning

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

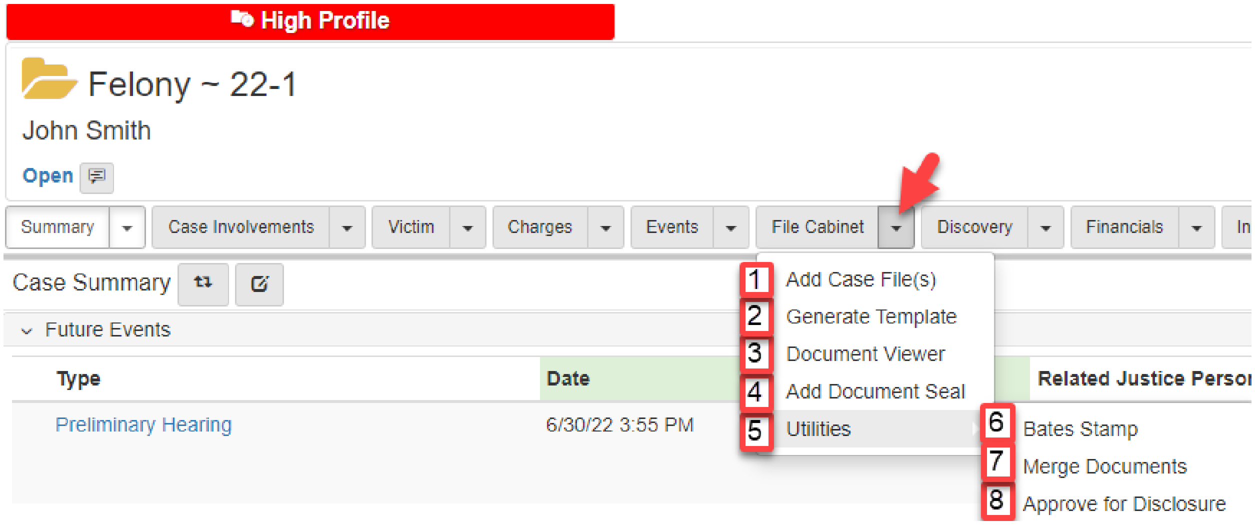
Filing cabinet

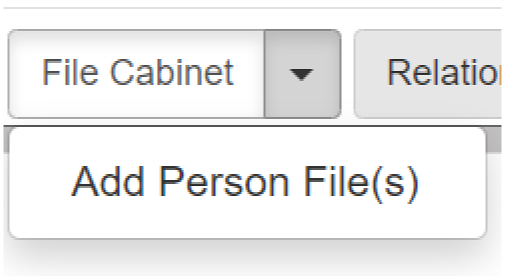
This section describes the **File Cabinet** and its features. This includes the **Case File Cabinet** and the **Person File Cabinet**.

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





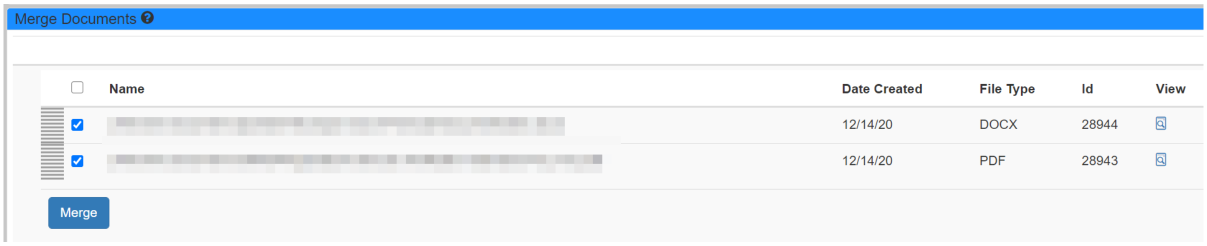
1. **Add Case File(s)** or **Add Person File(s)**: Open the corresponding form to insert a new file.
2. **Generate Template**: Open the generation form to select and generate a document from a template. Refer to https://documentation.journaltech.com/eAttorney/user/documents/generation.html for more information.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

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.

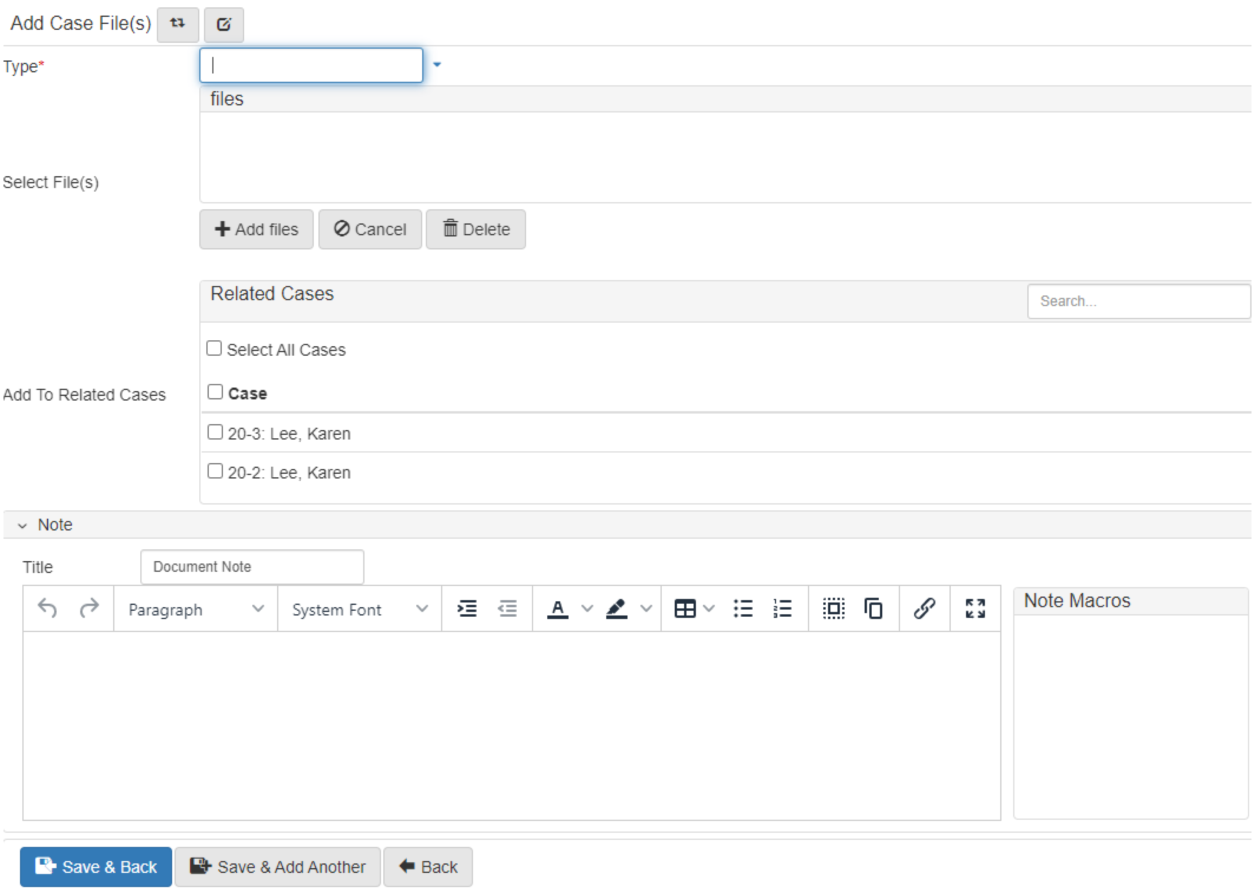
5. **Merge Documents**: Merge documents. You can merge unrelated doc types to result in a PDF.



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.

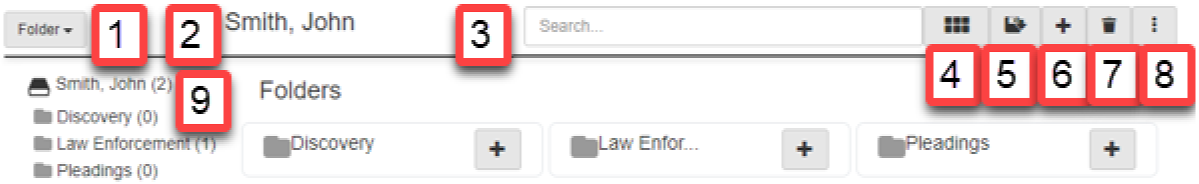
Add file dropdown

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.

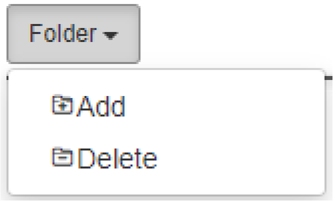


1. **Type**: set the **File Type**. This is unrelated to the file extension, for example `.pdf`.
2. **Date Filed**: set a filing date for the document. Select a date from the calendar dialog.
3. **Status**: set the document status.
4. **Location**: set a physical location or identifier for the document. 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.



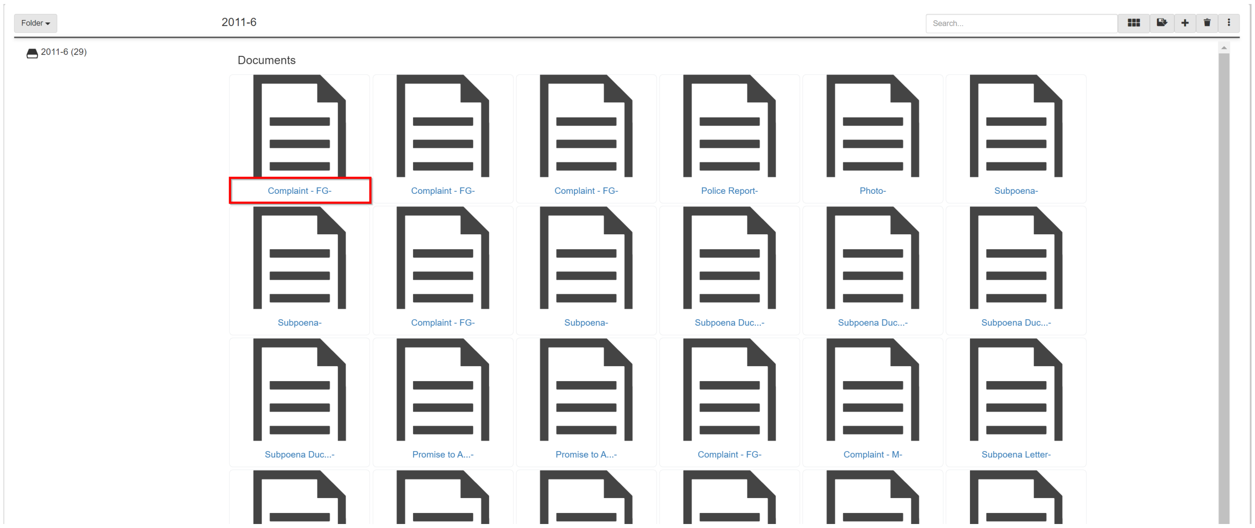
2. **File Name**: The selected filename. If no file is selected, the case or person name shows here.
3. **Search**: Filter the files based on search criteria.
4. The **List/Grid** icon: Swap between List view and Grid view.
5. The **Disk down arrow** icon: Download the selected documents. You can **[Control + 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.

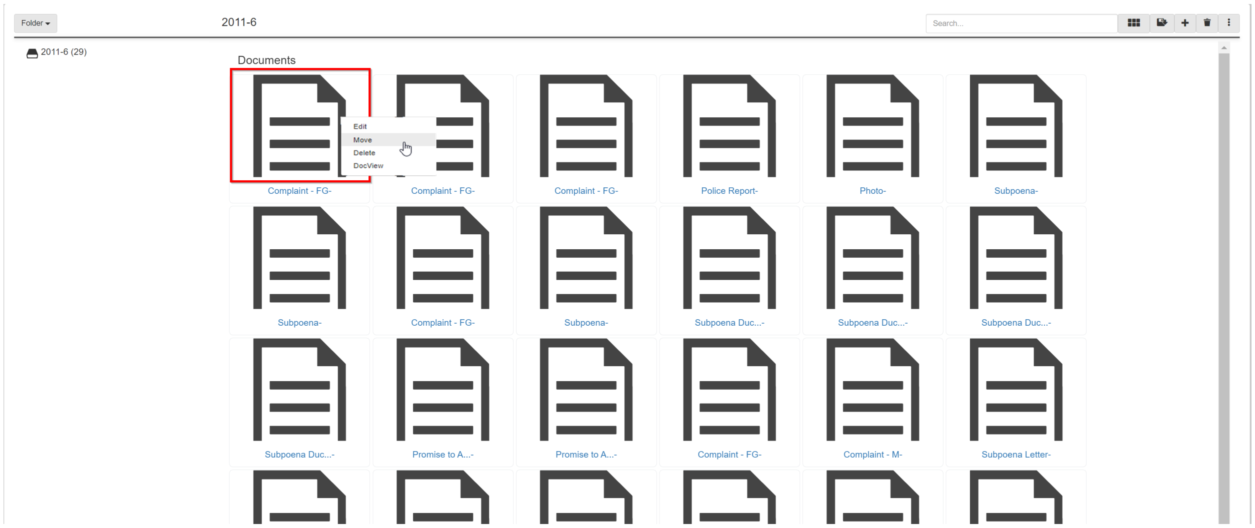
Update or edit file

Files can be updated by clicking the thumbnail name (when in thumbnail view), then change the type, file, and filename.



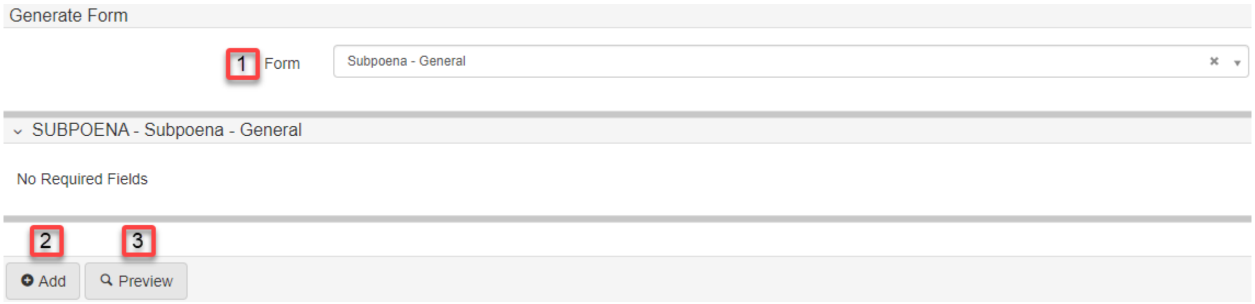
File context menu

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

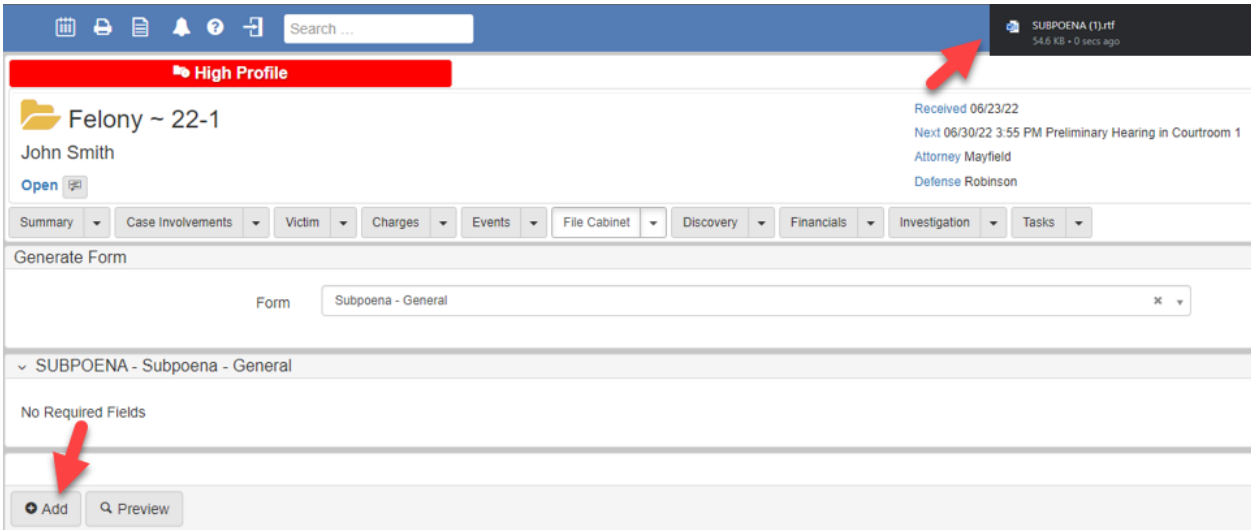
Document Generation allows a user to generate documents from templates. These templates can be stand-alone without user input or require input from the user to finish generation.



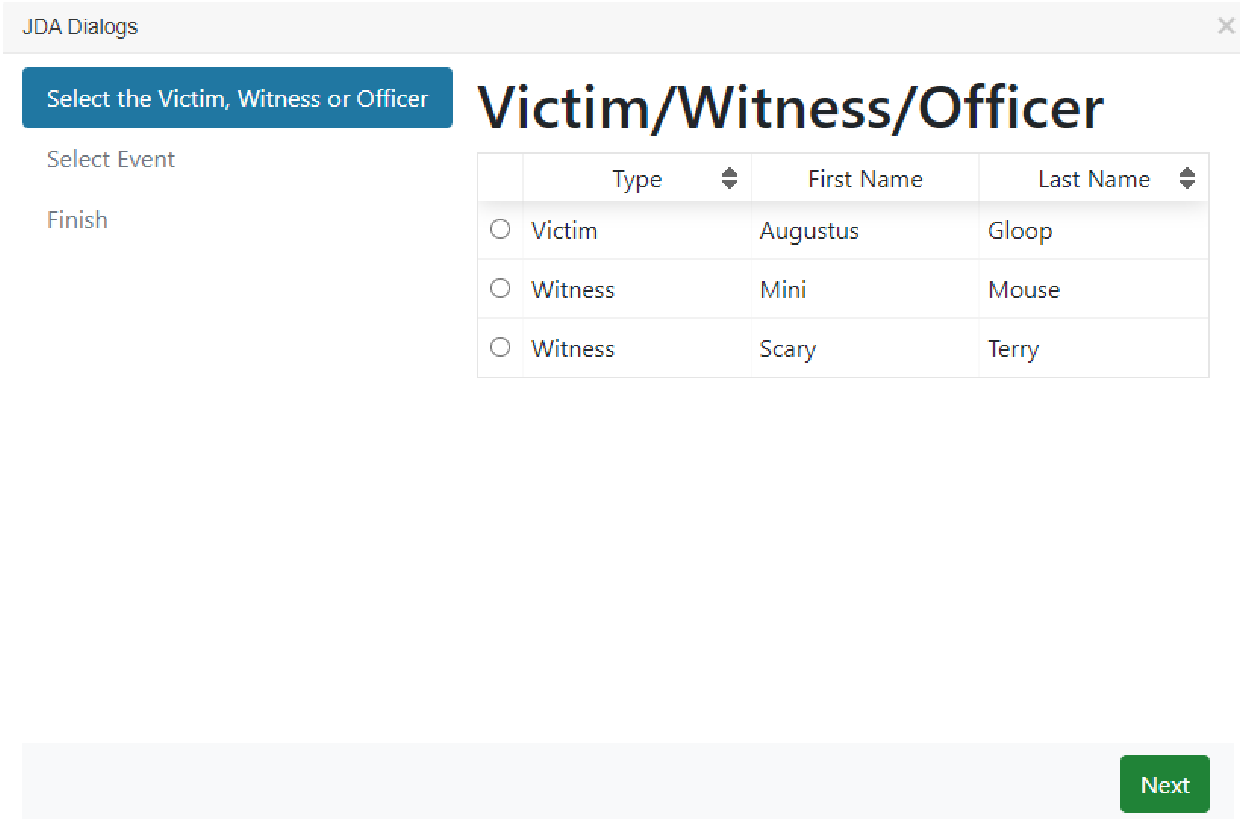
1. **Form** - Select the form you wish to generate from the dropdown.
2. **Add** - Add a document to the Case or Person Filing Cabinet.
3. **Preview** - Download a document for preview.

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.



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

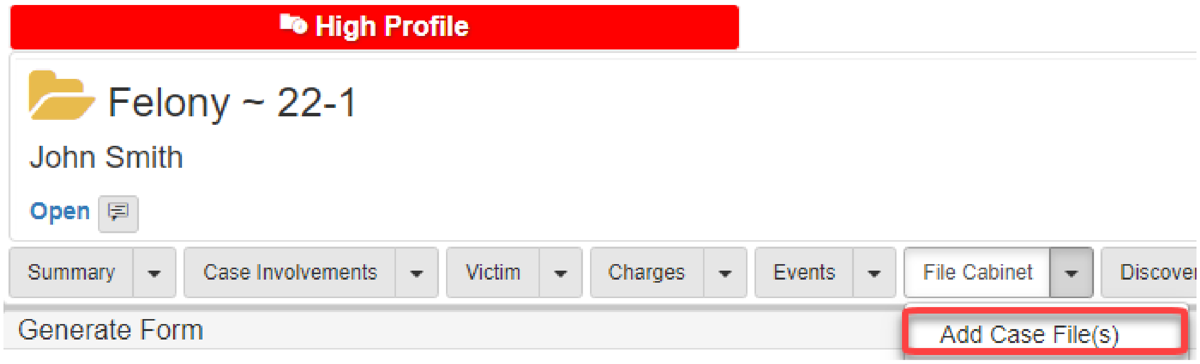
Document scanning allows a user to scan documents to a **Case** or **Person** record.

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)**.

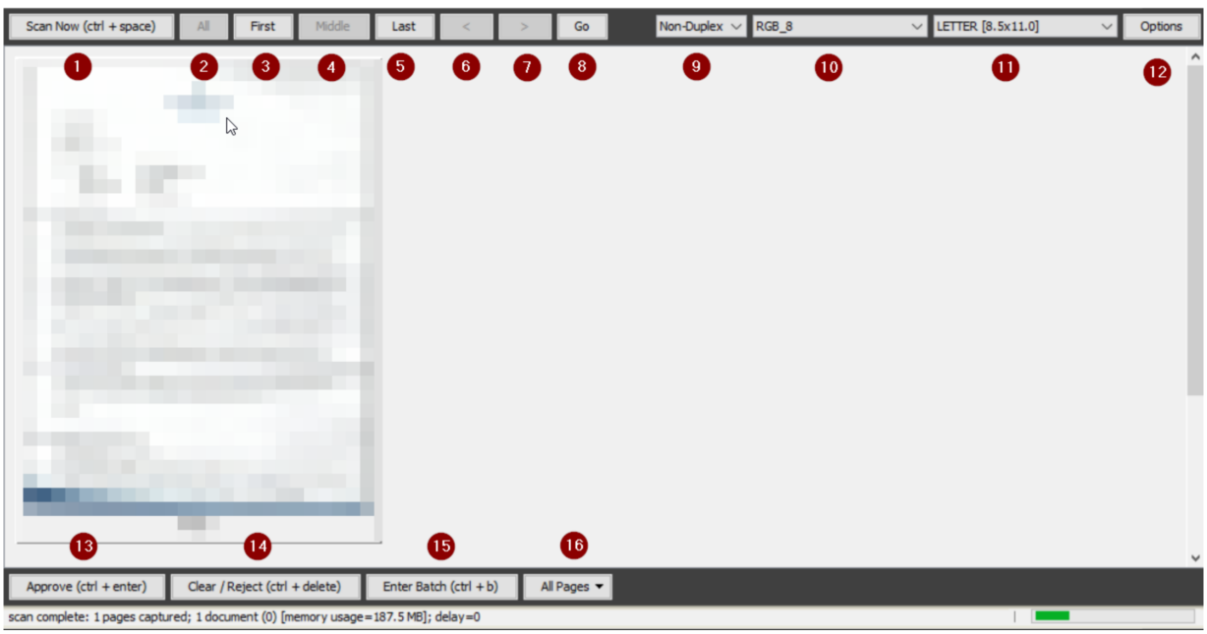


2. Fill out the required form fields.
3. Click **[Save and Scan]**.

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

   > Scan Application (If it does not start automatically, click here)...Starting Print / Scan Service...

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



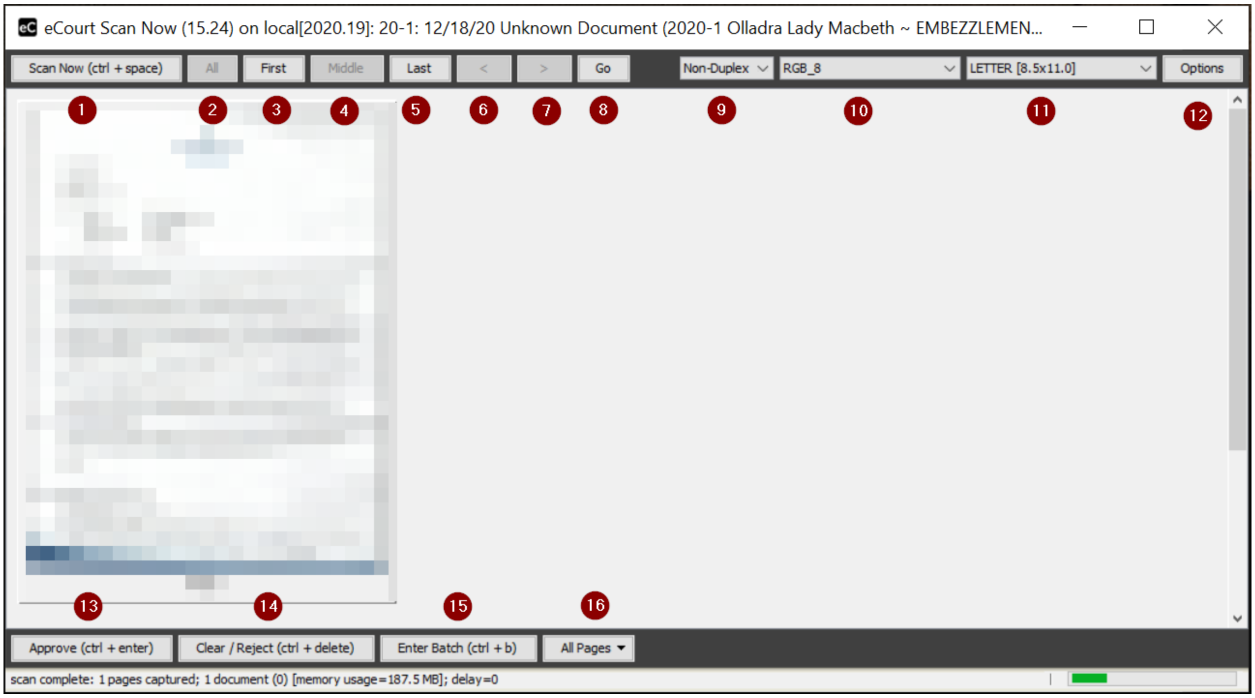
4. If an app does not launch, click one of the links in the message dialog.
5. Launch the downloaded Java app.

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

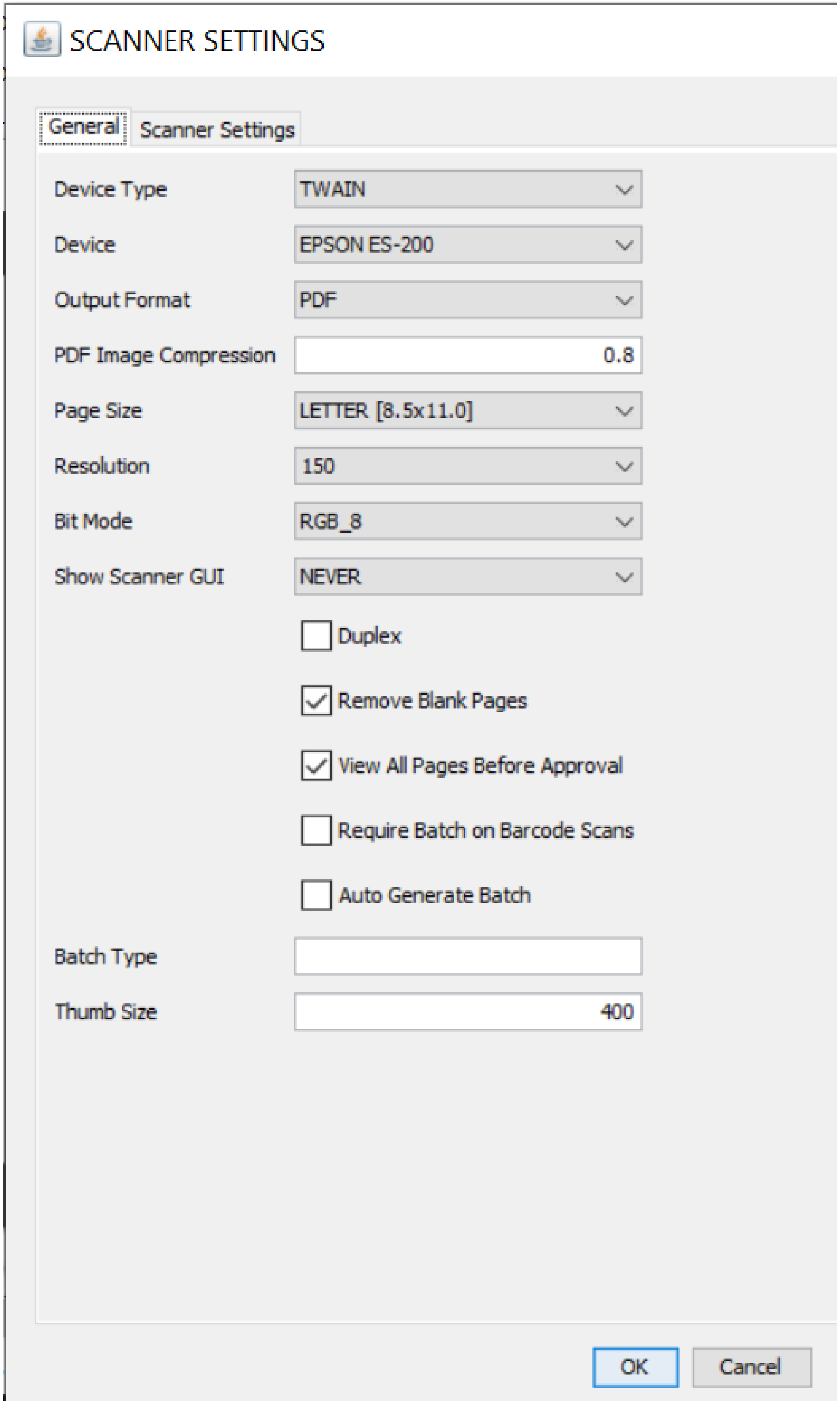
If you have a document already on a feeding scanner, the scanning app

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

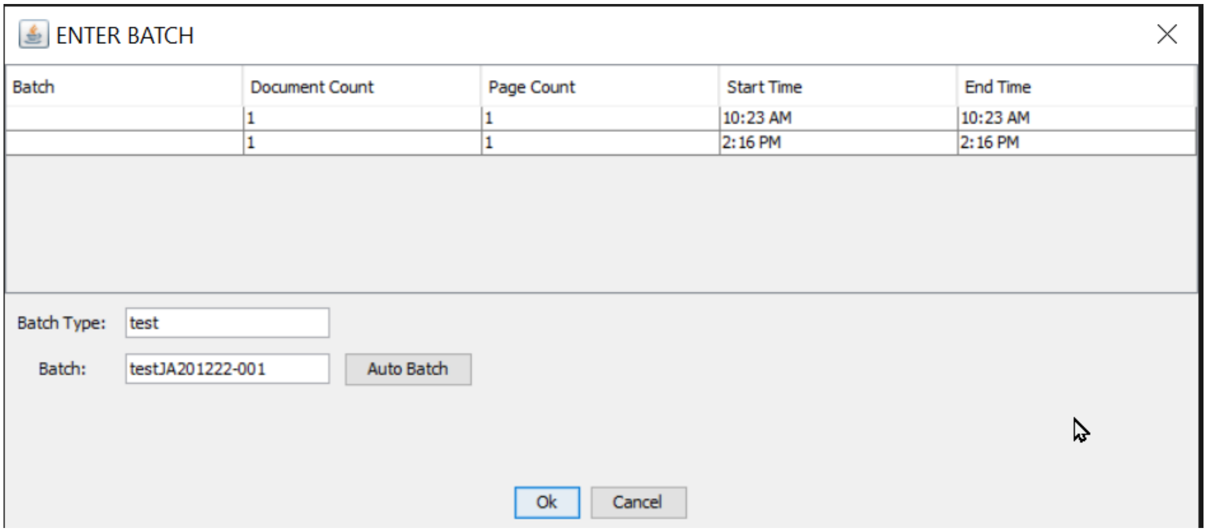
Scanning controls



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.



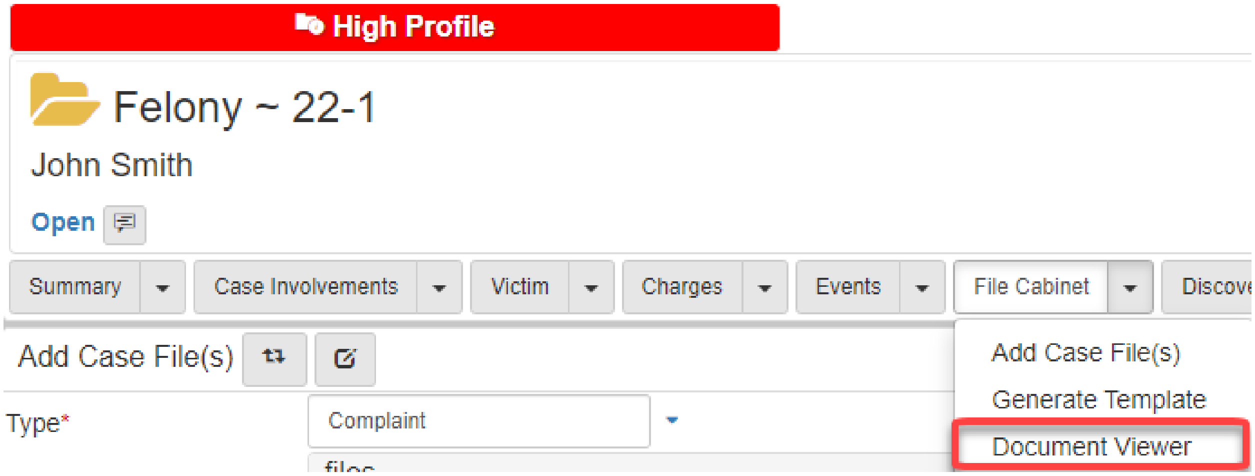
16. **Page Rotation**: Select option to rotate document pages.

Document viewer

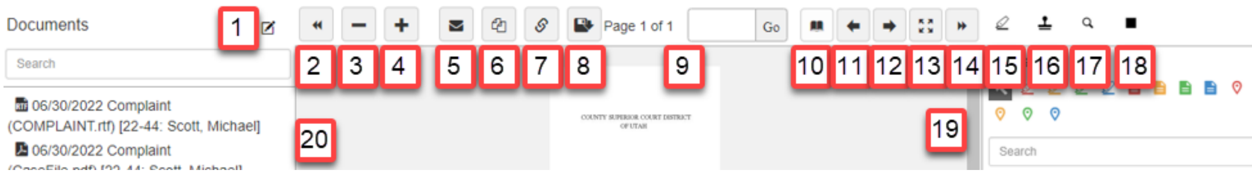
This section describes the Document Viewer and its features.

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

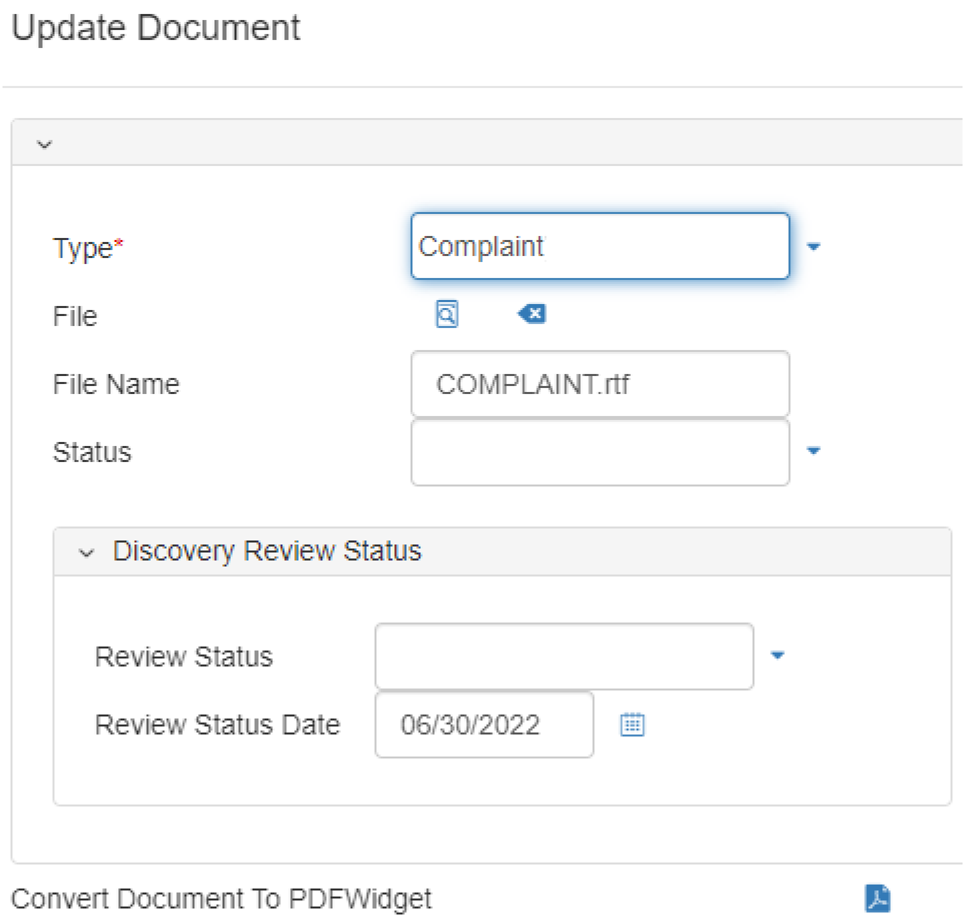
The **Document Viewer** can be accessed from a Case/Person view using the **File Cabinet dropdown › Document Viewer**.



Controls

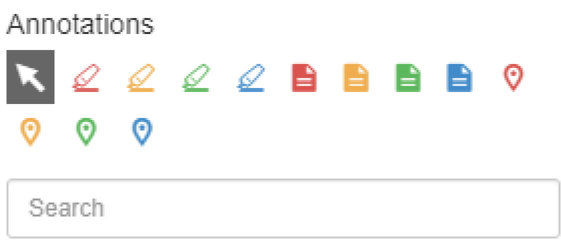


1. **Stack Paper Icon** - Organize Documents. Move files, add/remove/rename directories.



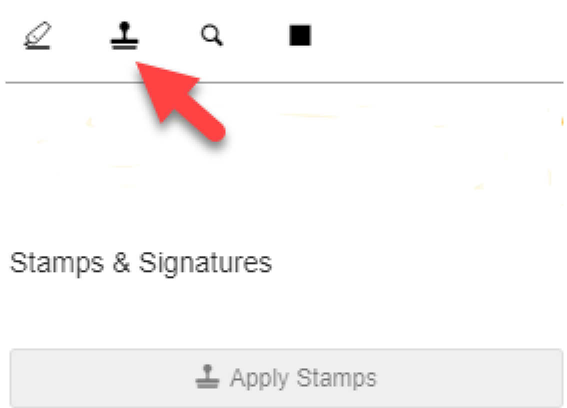
2. **Double Arrows Icon** - show or hide the left side bar in the viewer.
3. **Minus Sign Icon** - zoom out the document view.
4. **Plus Sign Icon** - zoom in the document view.
5. **Print Icon** - print the document. Requests desired number of copies.
6. `Email Icon` - email the document in your default 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.

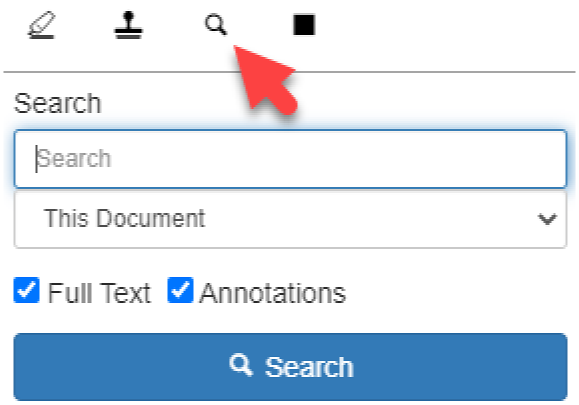


Created annotations can be filtered in the Find bar.

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

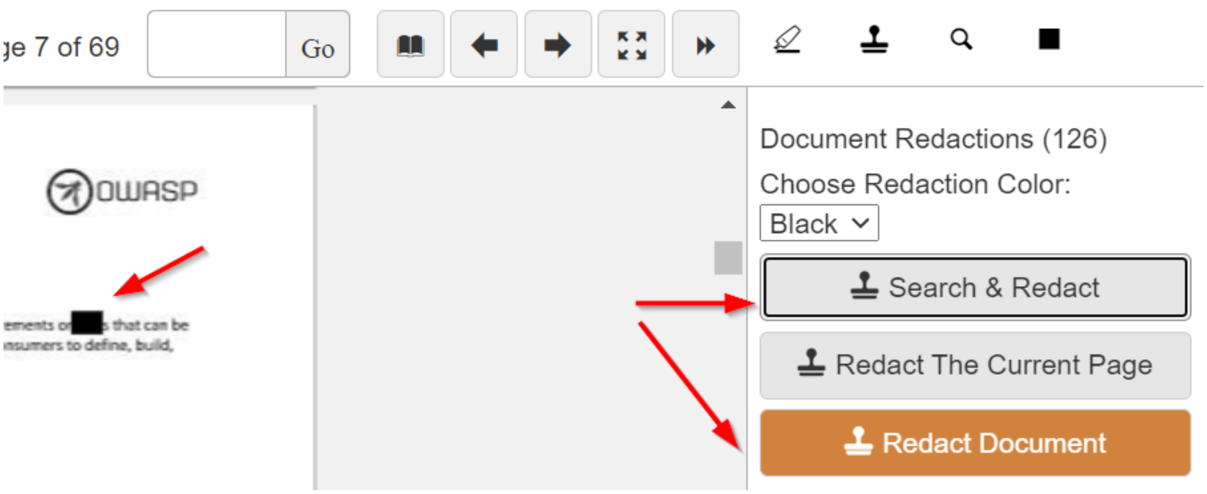


18. **Magnifying Icon** - Swap Right Sidebar content for Document Search section.



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.

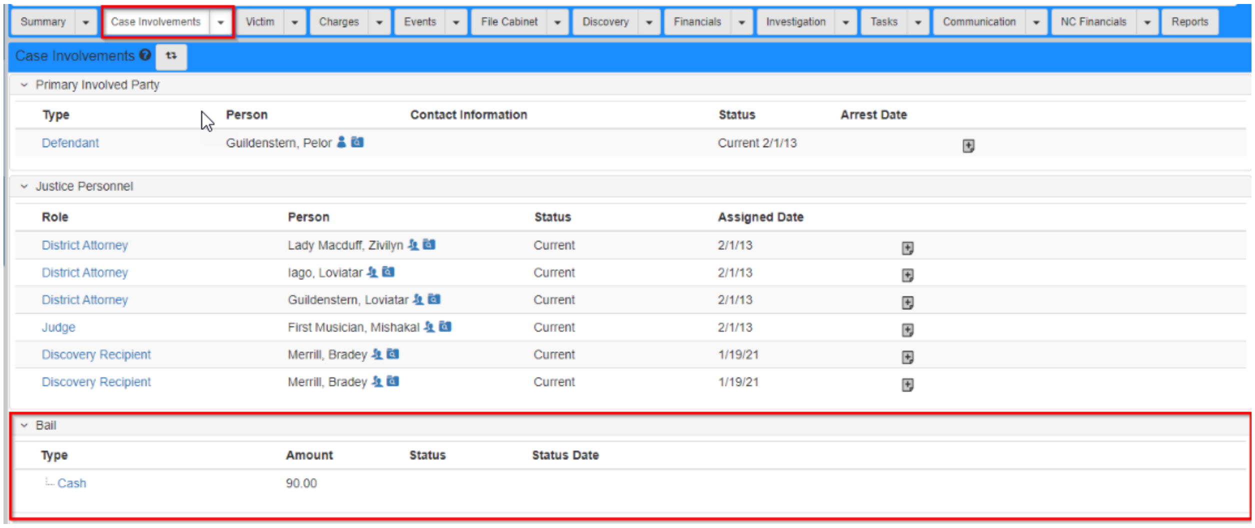
20. **Left Side Bar** - The left bar shows the documents and folder structure. Also, you can filter the documents based on your Find criteria in the Find bar.
21. **Right Side Bar** - The right bar content changes based on the buttons you have clicked in previous steps. Annotations, Stamps, Search and 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

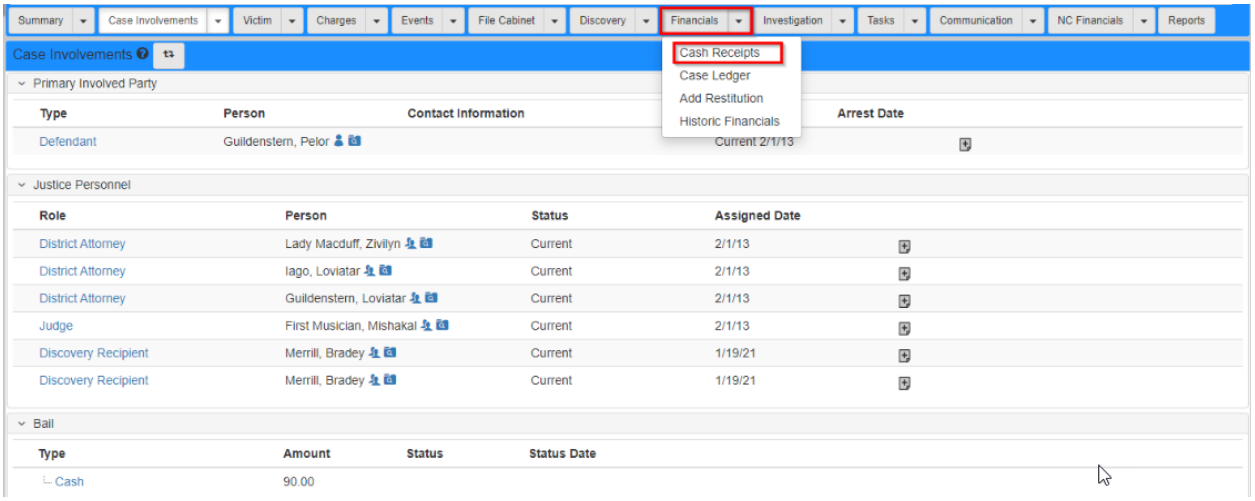
Bail can be found in the case folder view under `Case Involvements` tab:



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

Cash receipts

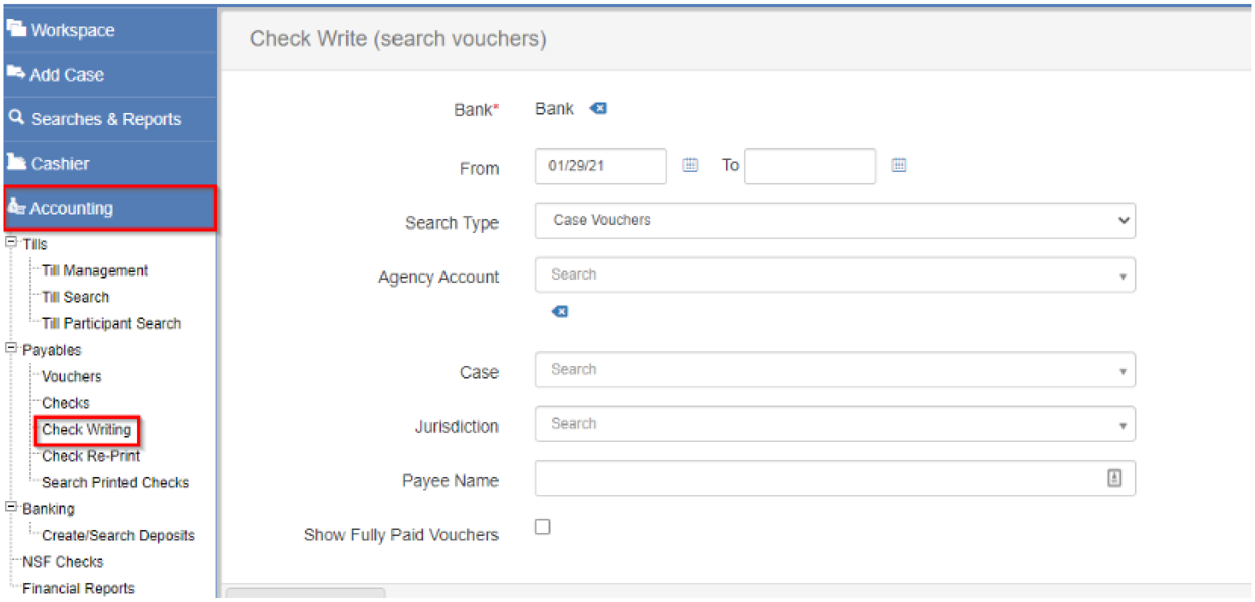
The Cash Receipts screen allows for the payment of invoices and transfer of money. Cash Receipts can be found under case folder view under **Financials › Cash Receipts** or under **Accounting › Cash Receipts** in the left hand side navigation bar.



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.



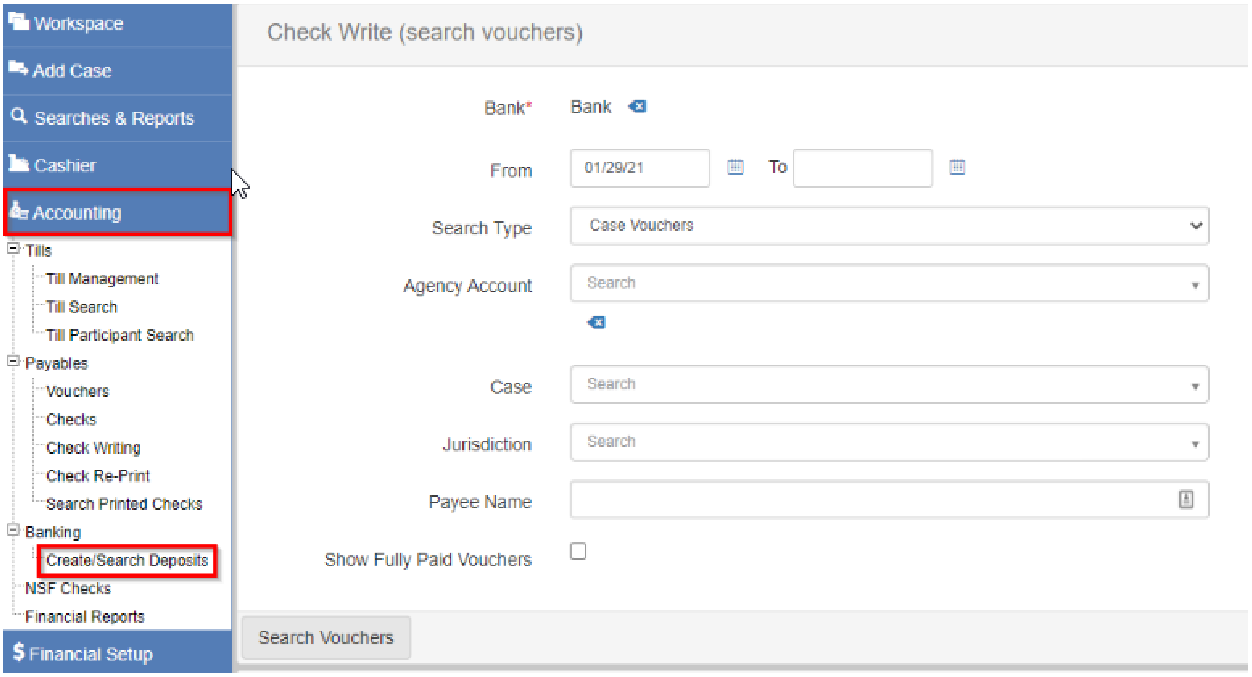
For information on check writing, see https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html.

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.



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

Payment plans

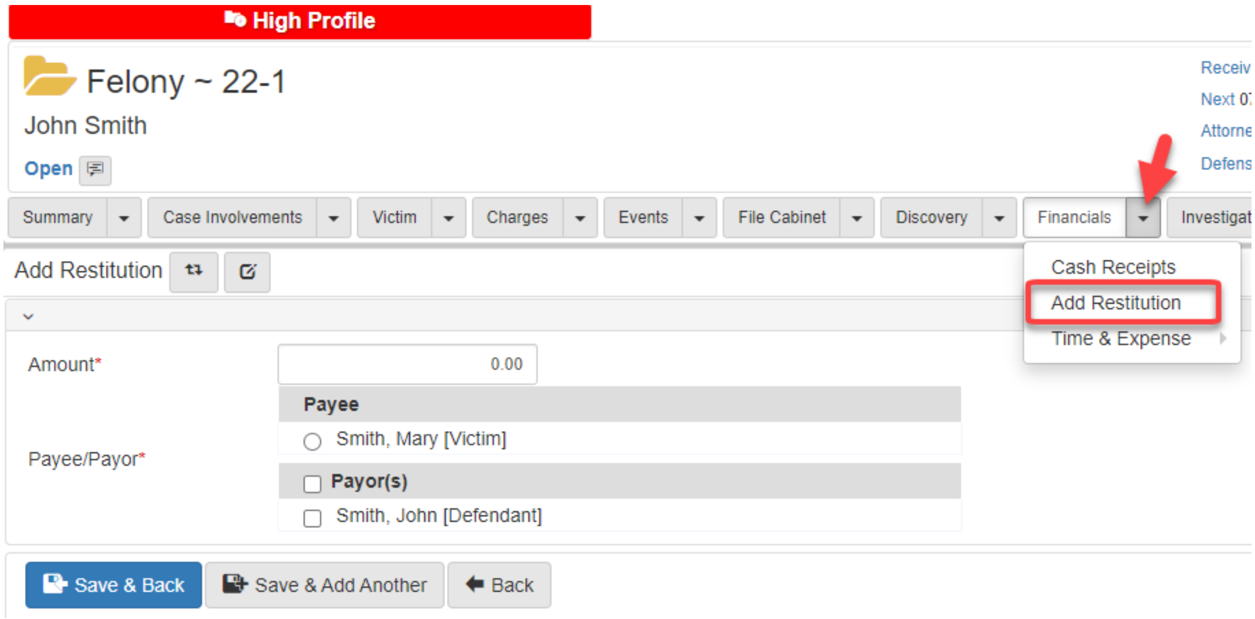
Payment plans allow the payor to make small payments towards the obligations over an extended period of time. For information on pay plans, see https://documentation.journaltech.com/eAttorney/user/financials/pay_plans.html.

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.



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

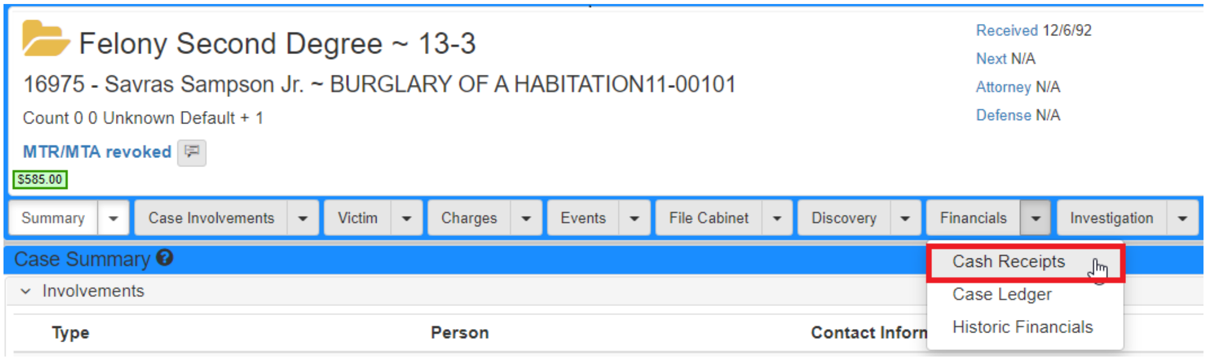
Use the **Cash Receipts** screen to pay invoices and transfer money.

Opening a till

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

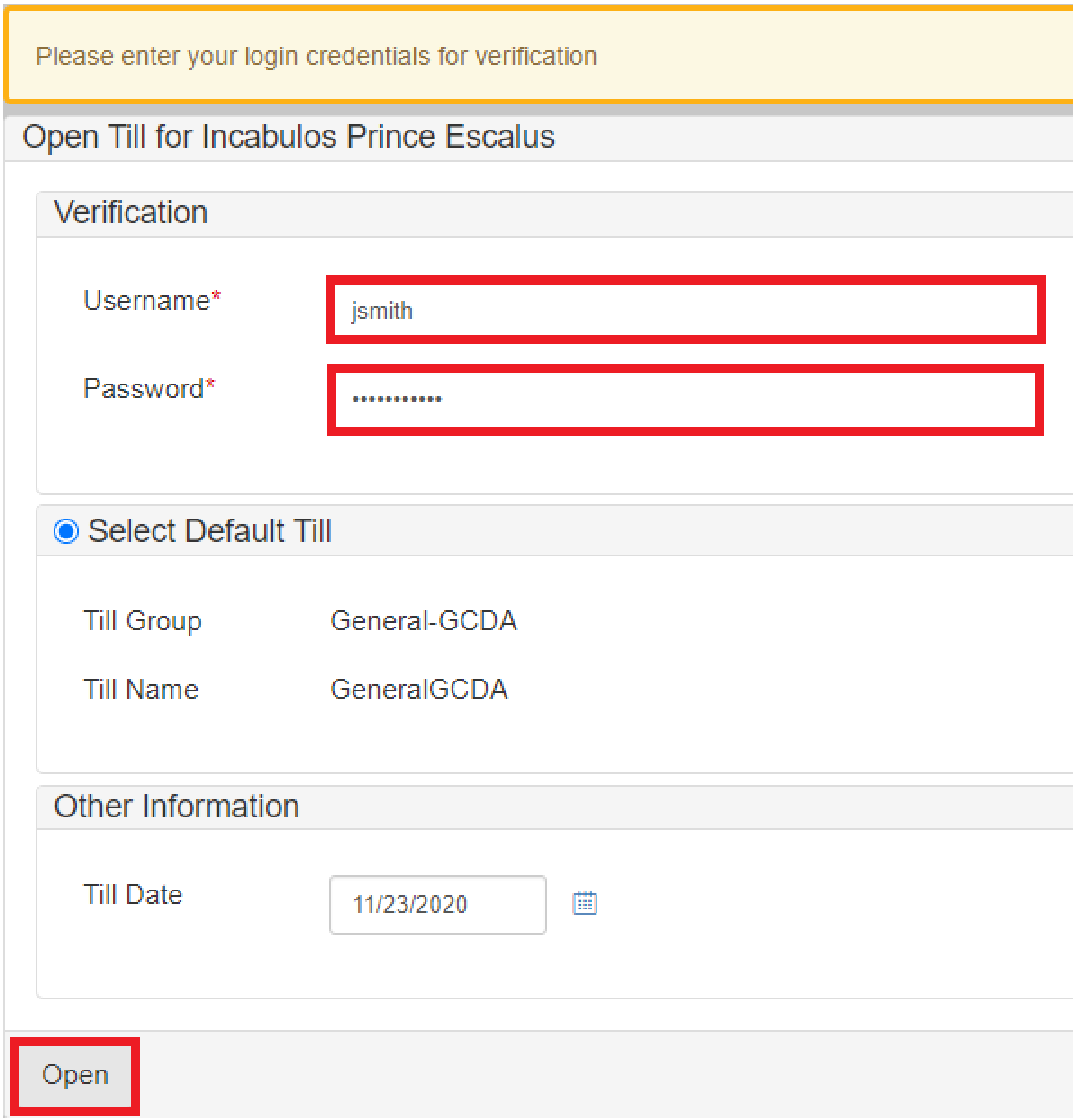
1. Navigate to **Left navigation › Cashier › Cash Receipts › Open Till**.

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.



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

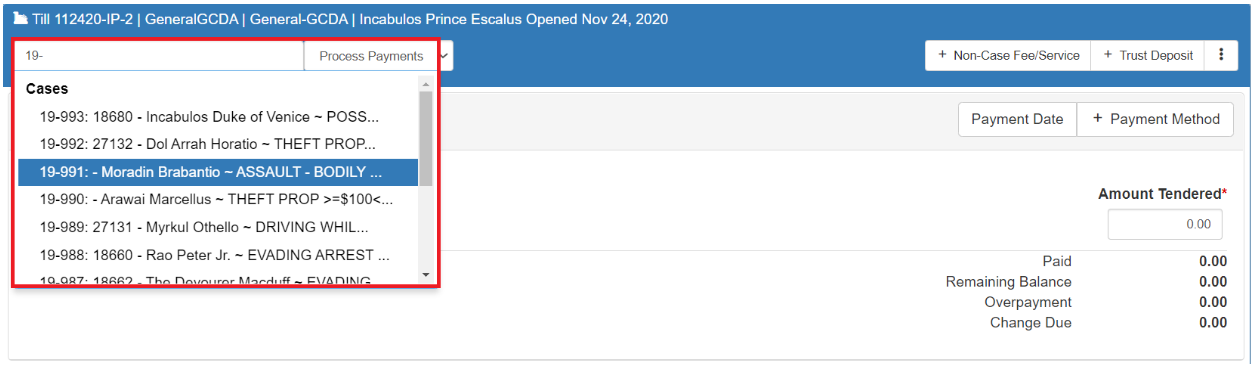
Navigate the cash receipts screen

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.

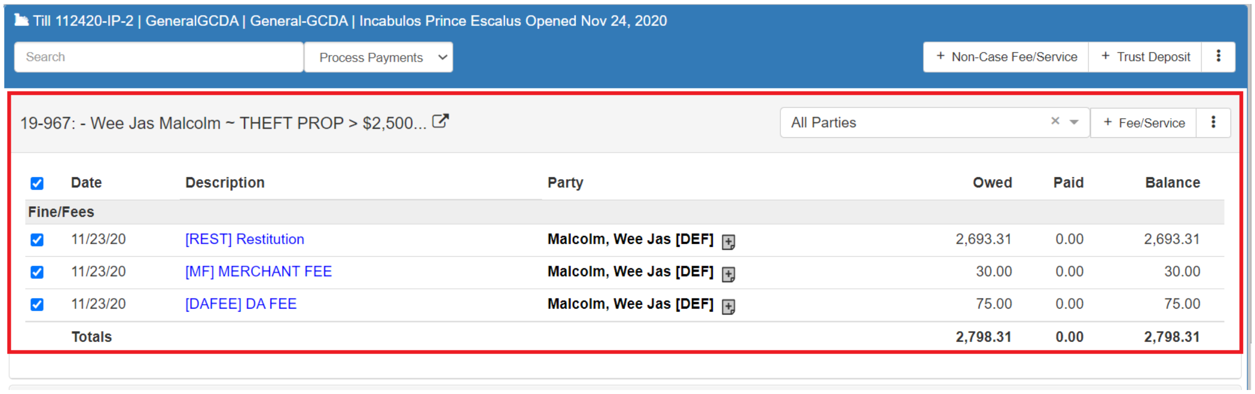
The **Search Cases** field in the **Cash Receipts** screen can be used to display a **Case**

Assessment Detail panel.

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

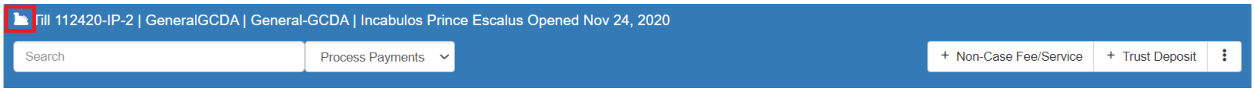


By choosing a case from the list, the **Case Assessment Detail** panel shows. By searching and choosing another case, multiple panels can be shown. A benefit of opening multiple cases is the ability to take payments over more than one case at once.

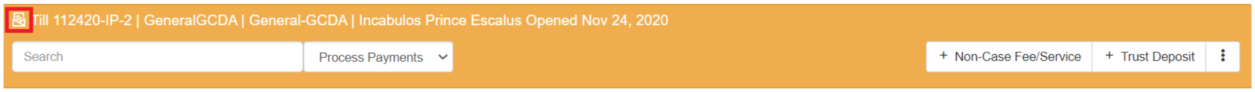


Switch till modes

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.

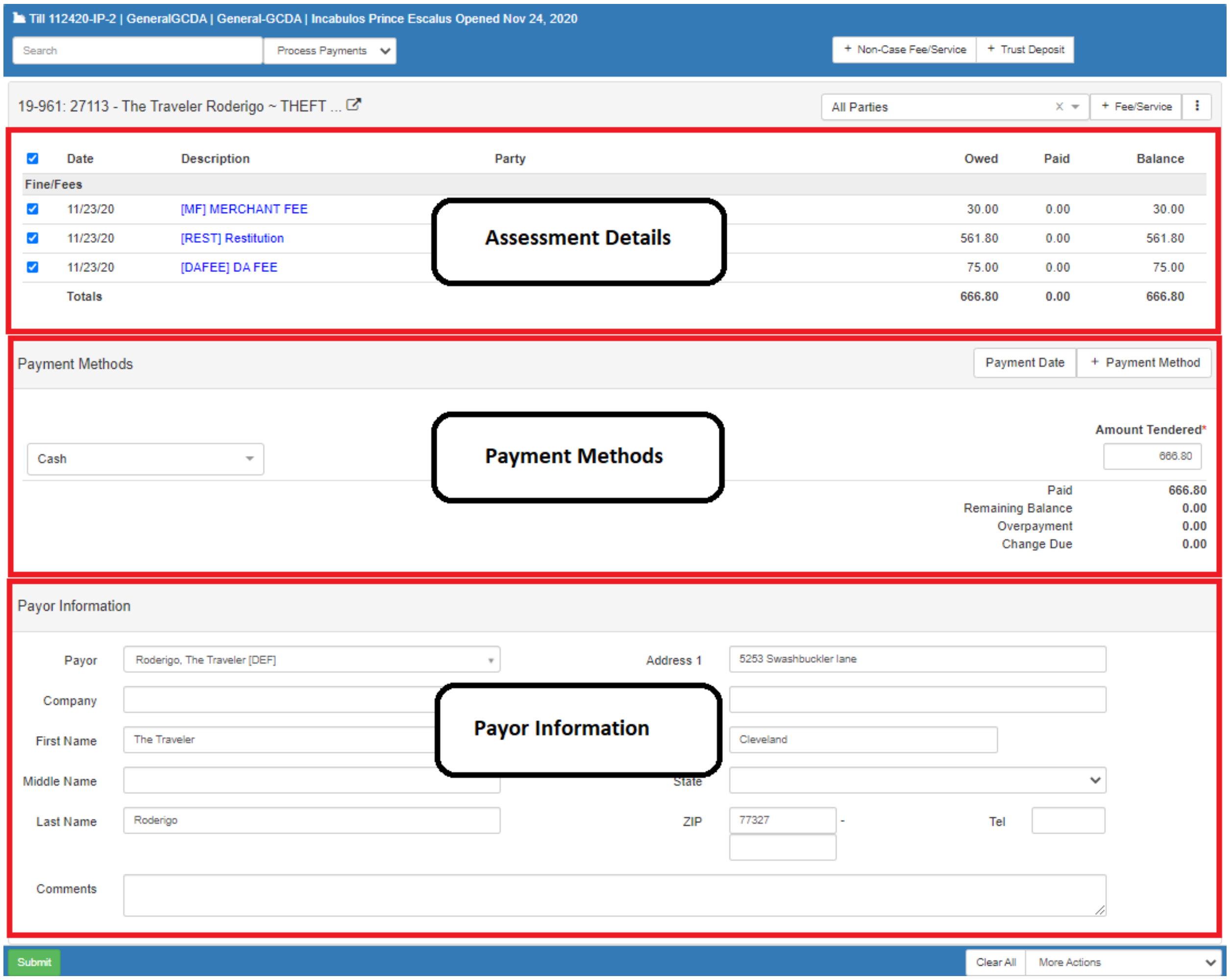


If a user needs to record a payment made by mail, they click the **Cash Register** icon in the upper left corner of the **Cash Receipts** screen. This changes the background color to yellow and replaces the **Cash Register** icon with an **Envelope** icon. This option is only used if you must separate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



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**:



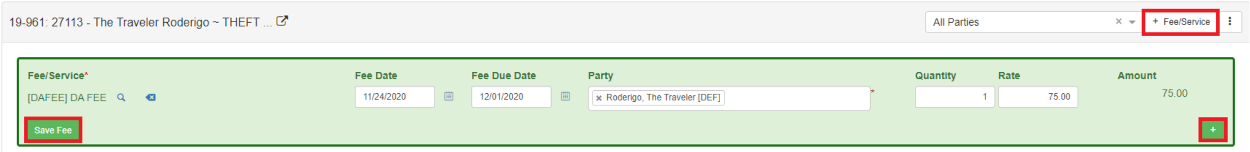
The **Assessment Details** panel shows fees, fines, or services assessed to the case. It is also possible to show more than one case **Assessment Details** panel using the **Case Search** field.

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**].

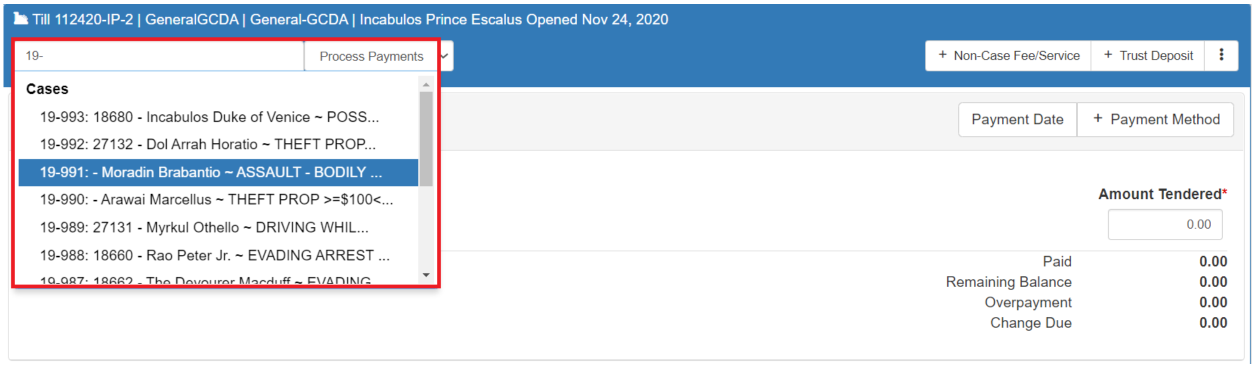


The following options are available when adding a fee:

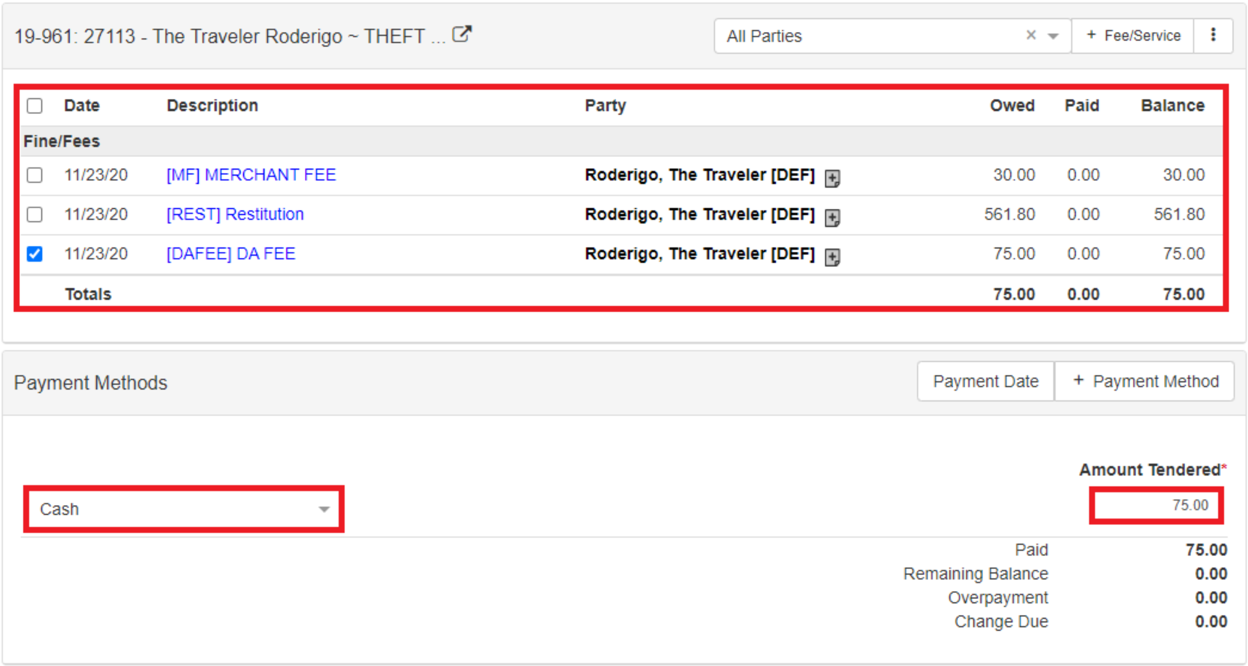
Field/button	Description
Fee/Service	Click the **Fee/Service** lookup to show a dialog box where you can choose a fee, fine, or service.
Fee Date	This populates with the current date and is the date the fee/service is added.
Fee Due Date	Set this to the date the fee is due by.
Party	Use the **Party** 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 an another item to the list.

Take a payment

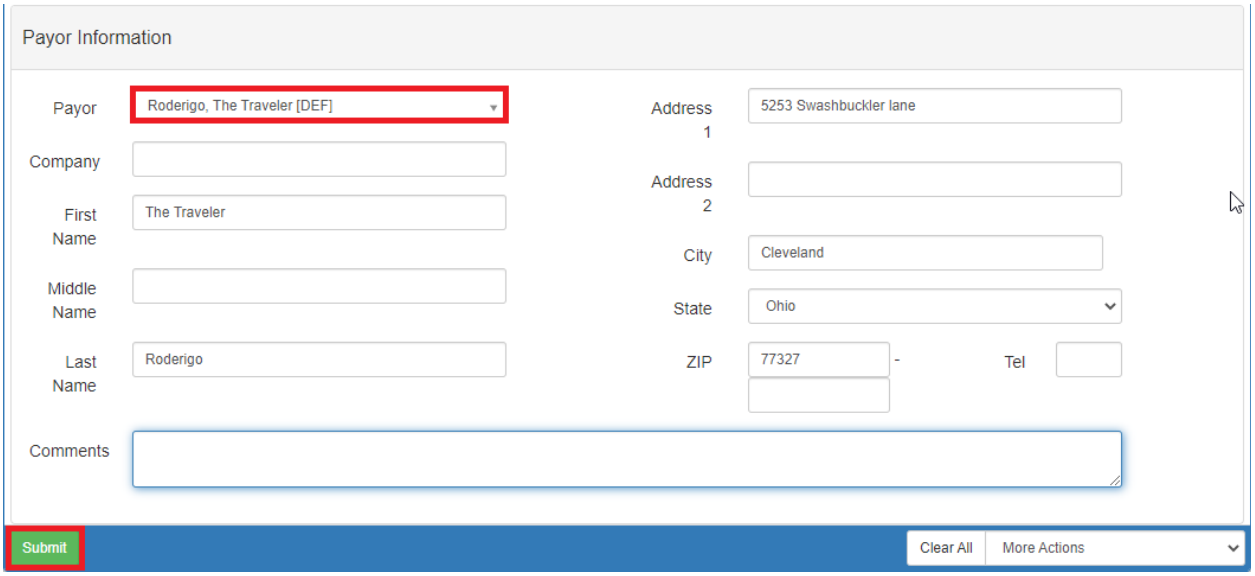
Payments are made in the **Cash Receipts** screen. If a case is not loaded into the screen, search for a case to take payment for.



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.



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.

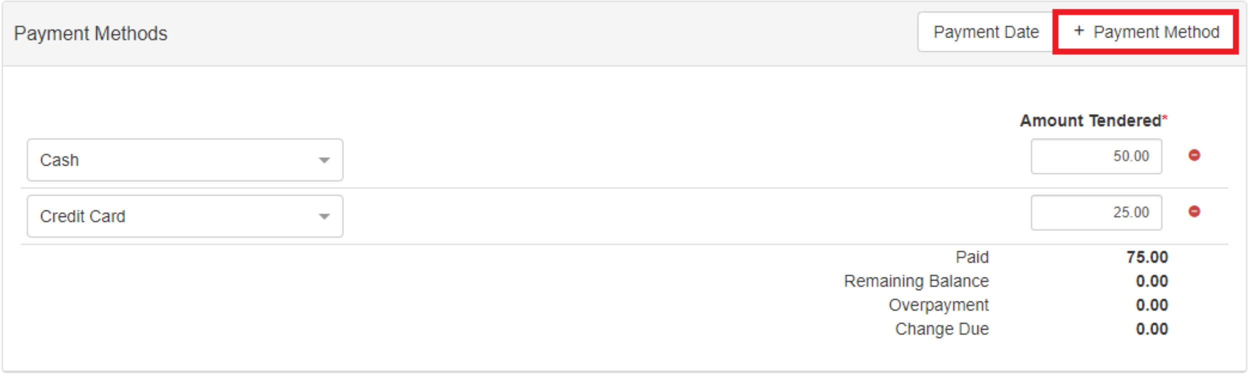


If the invoice is paid in full, it no longer shows on the **Cash Receipts** screen and a printable receipt is shown. The receipt can be reprinted from the **Case Ledger** screen.

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.



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.

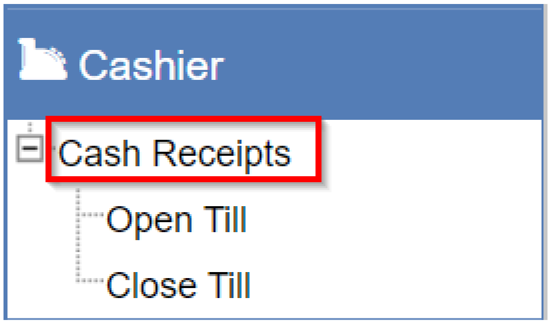
Accessing a payment plan

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

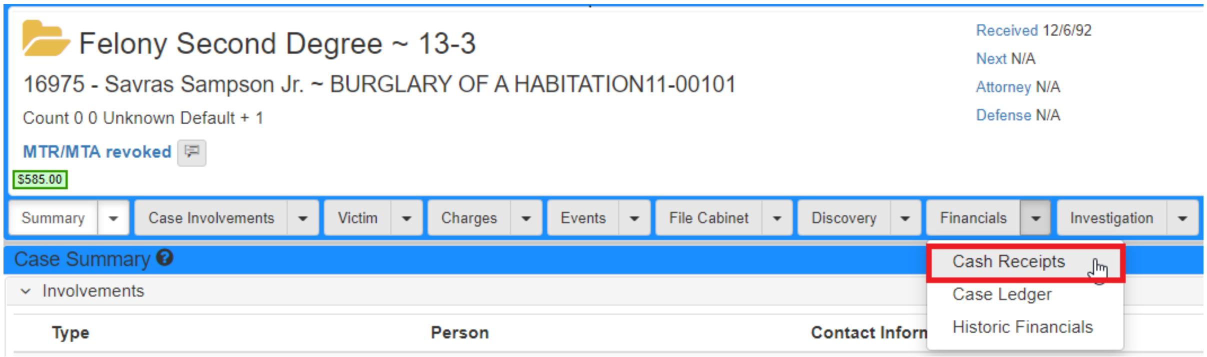
Only Financial users can navigate to the **Cash Receipts** screen. For more information about setting up a user as a Financial User, refer to User navigation.

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**.



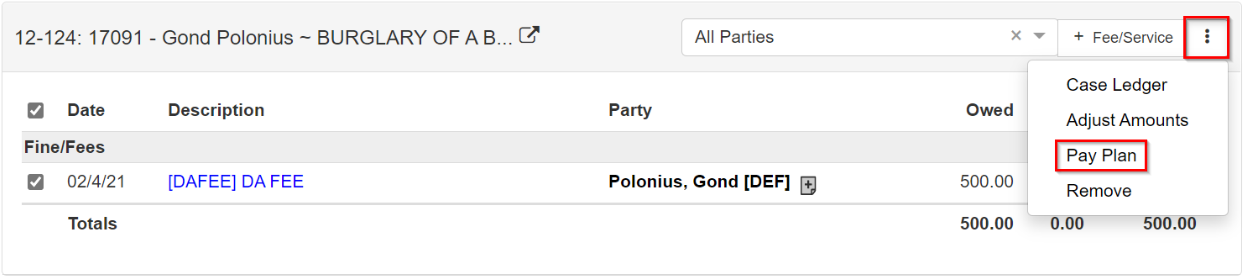
If accessed using the Left navigation, the Case is not populated on the **Cash Receipts** screen. You need to search for the case you would like to work with. Refer to https://documentation.journaltech.com/eAttorney/user/financials/cash_receipts.html for more information on searching. If accessed using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

Receipts screen.

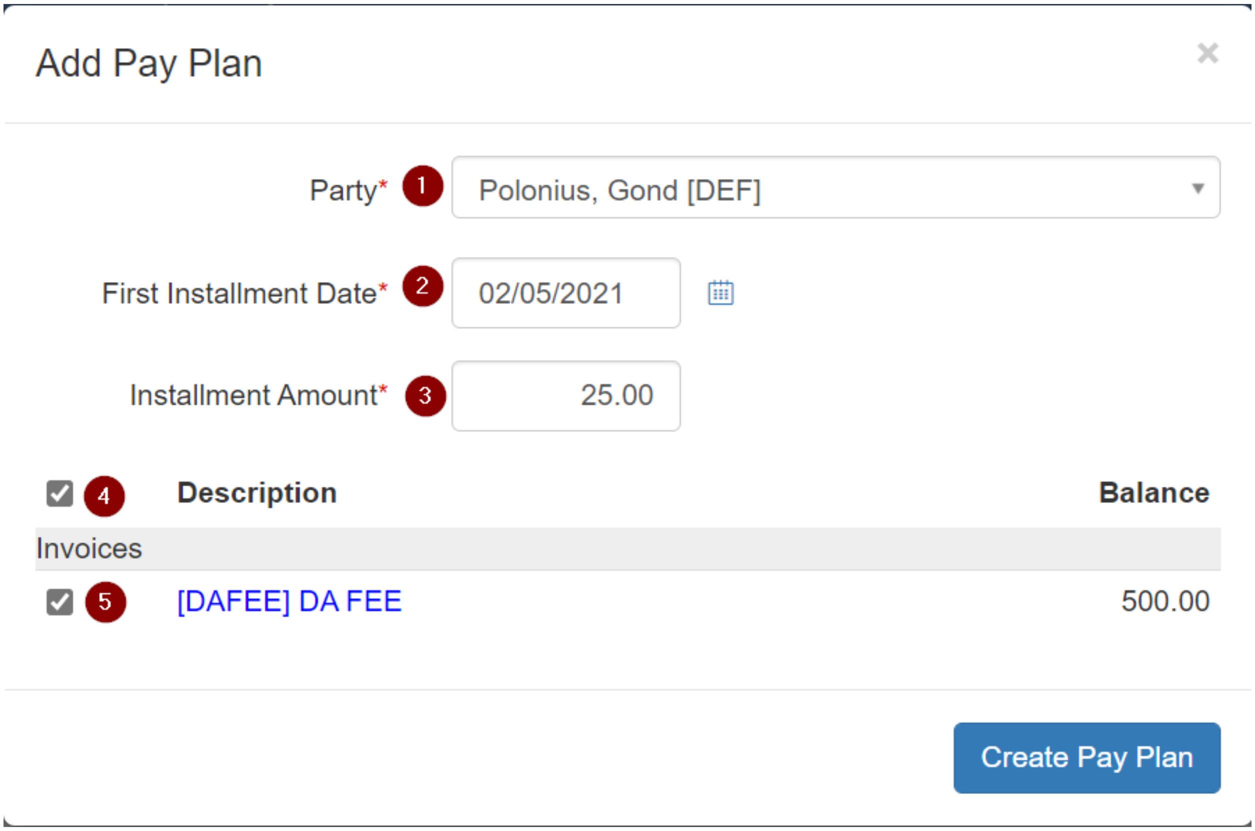
Adding a payment plan

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 **Add Pay Plan** form shows:

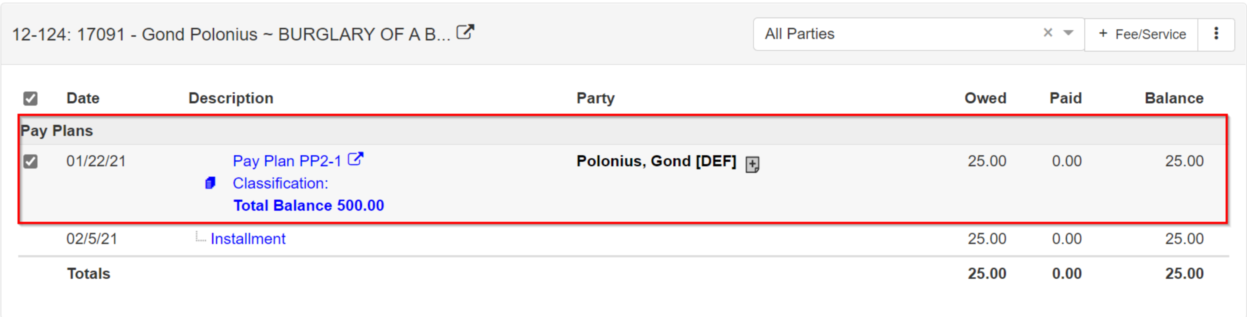


1. Use the **Party** dropdown to select the paying party.
2. Set the payment plan **First Installment Date**.
3. Set the recurring **Installment Amount**.

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.

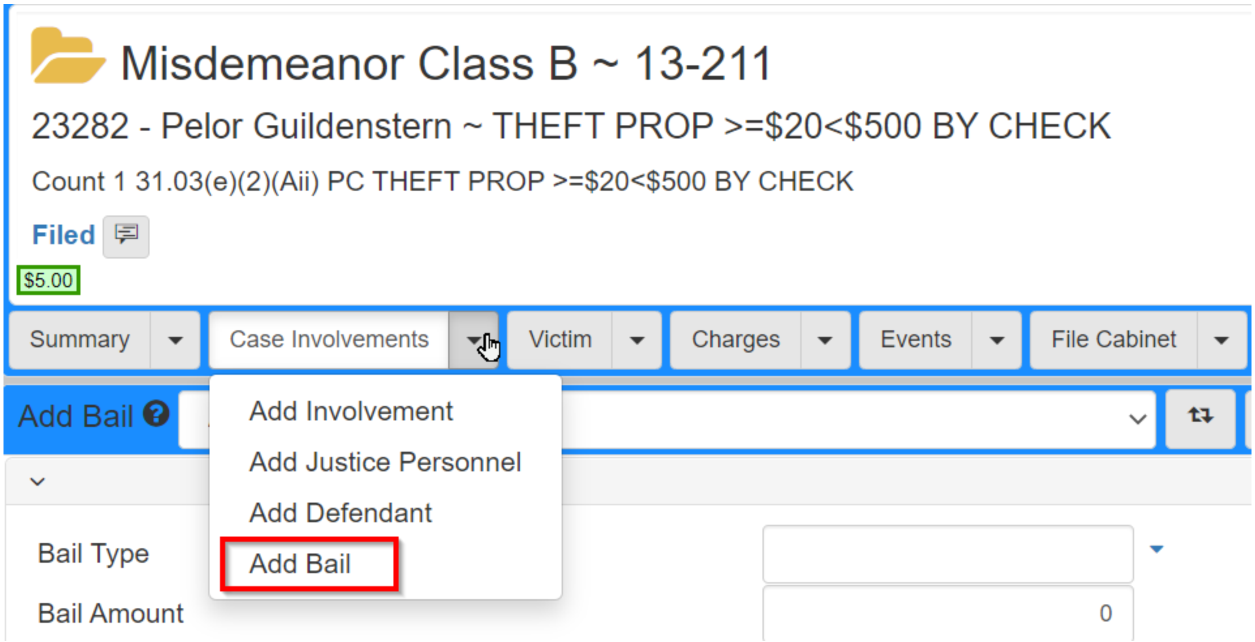


Bail

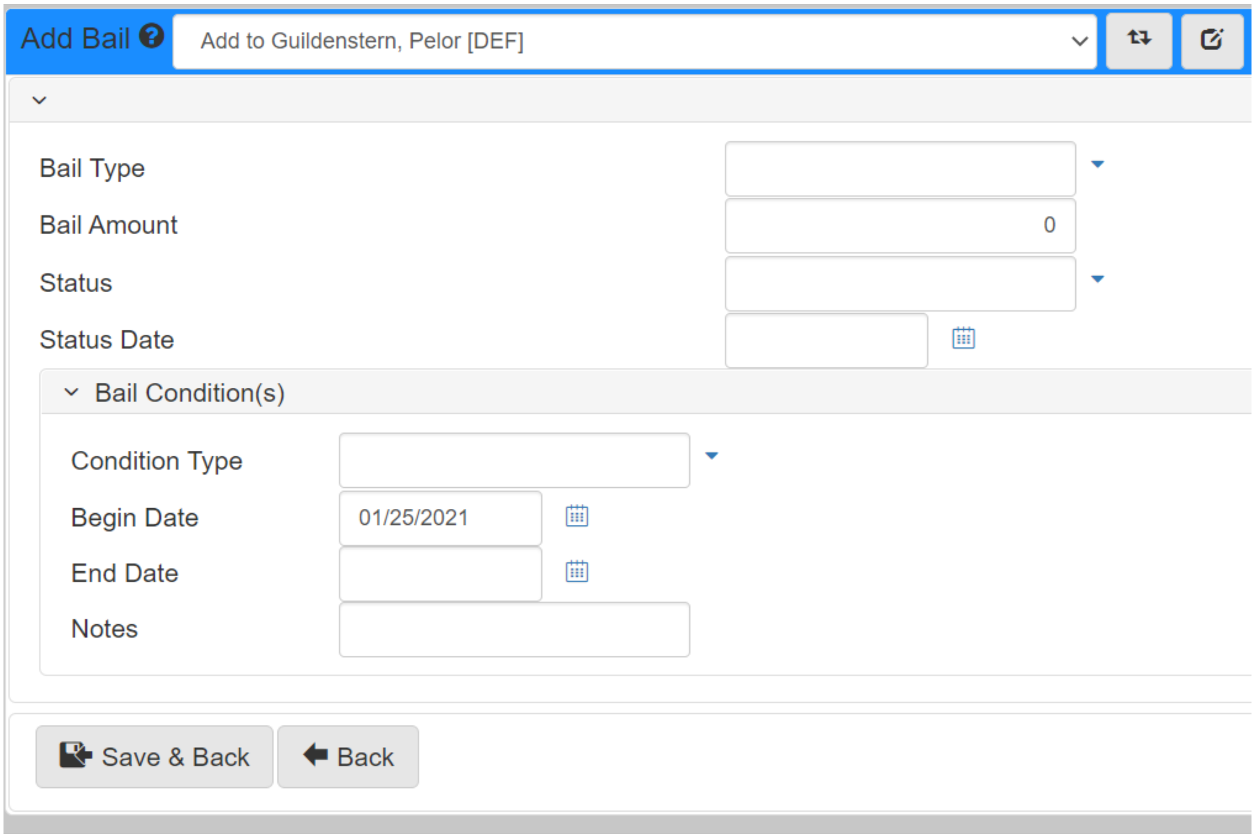
! Do not forget to `Open a Till` if you have not already today.

Create a cash bail record

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



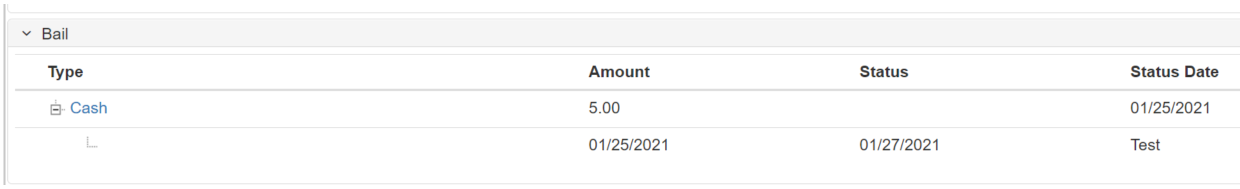
In the **Add Bail** screen, fill in the **Bail** and **Bail Condition(s)** panels.



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.

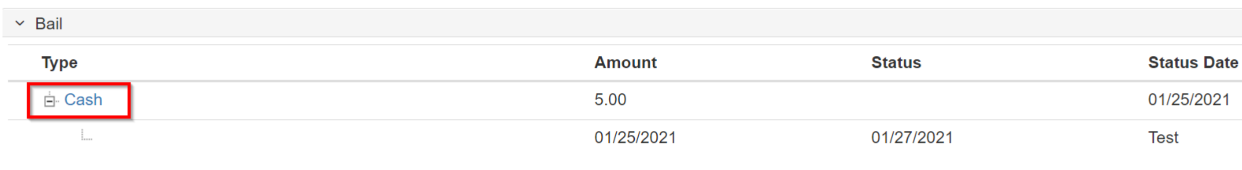


Bail

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

Post cash bail

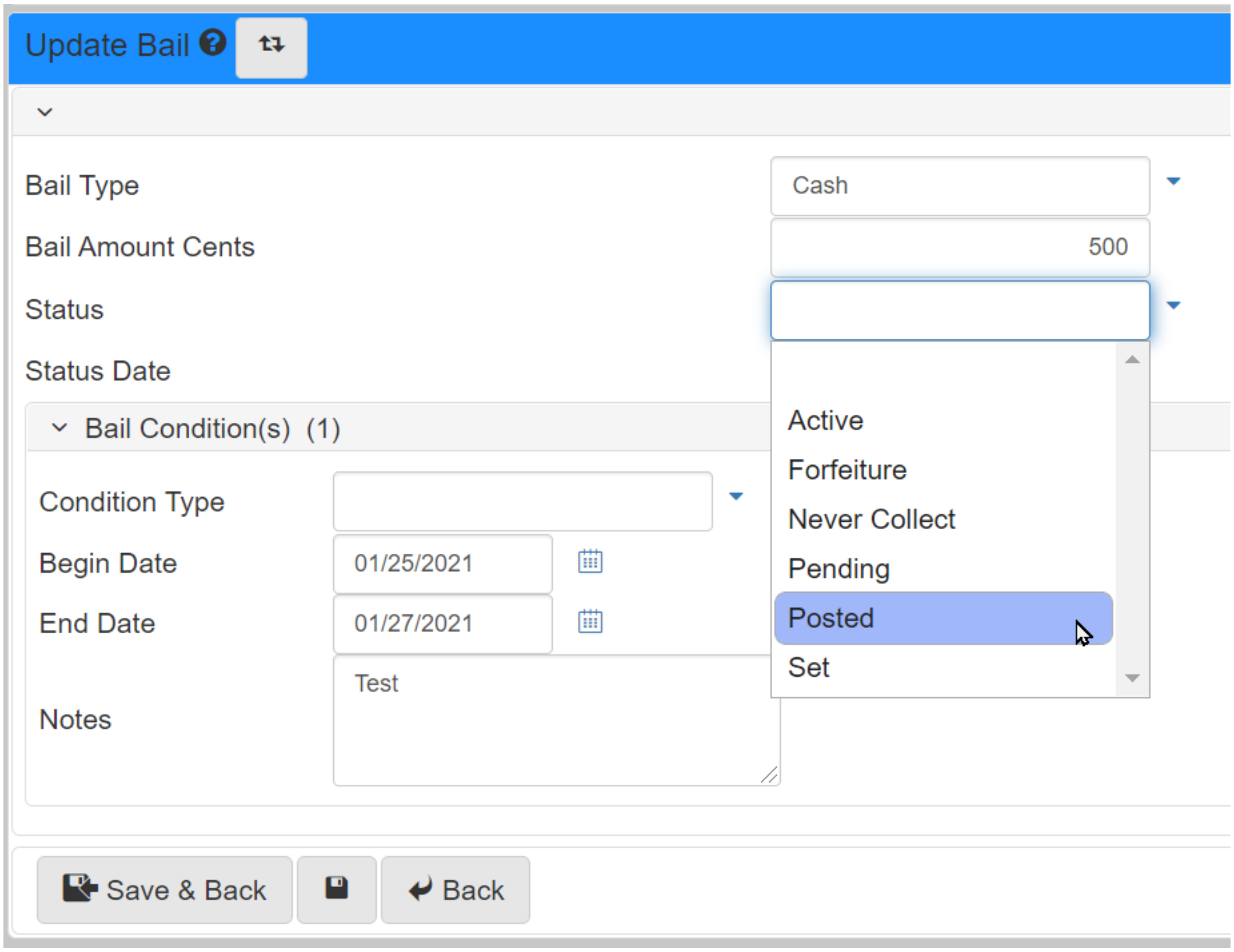
Posting a **Cash** bail makes the **Bail** record become a collectable financial and show on the **Case Ledger**. To make this happen, the **Bail Status** needs to be set to **Posted**. To update the **Bail Status**, click the **Cash** link in the **Type** column of the **Bail** panel at the bottom of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



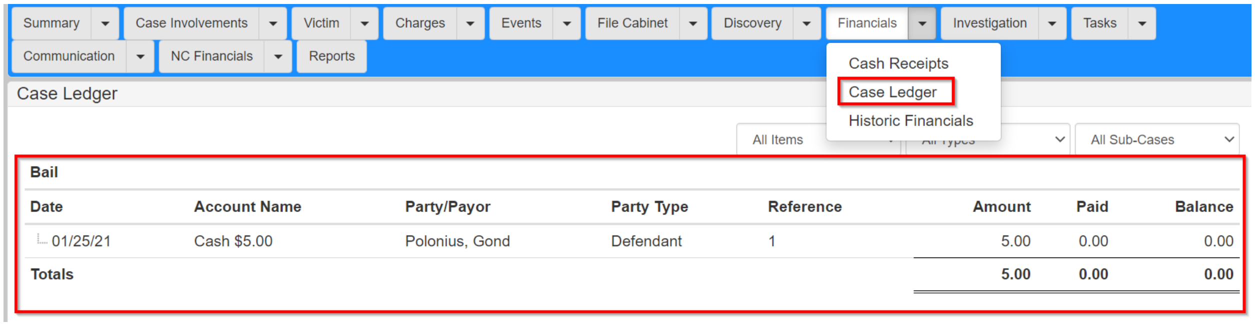
Bail

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

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

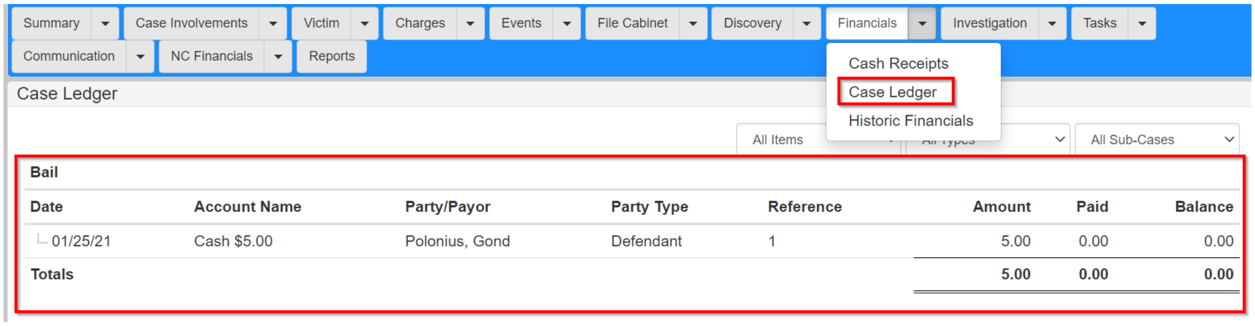


The updated status shows on the **Case Involvement** screen. The **Bail** also shows on the **Case Ledger**. The **Bail** can now be paid into eAttorney.

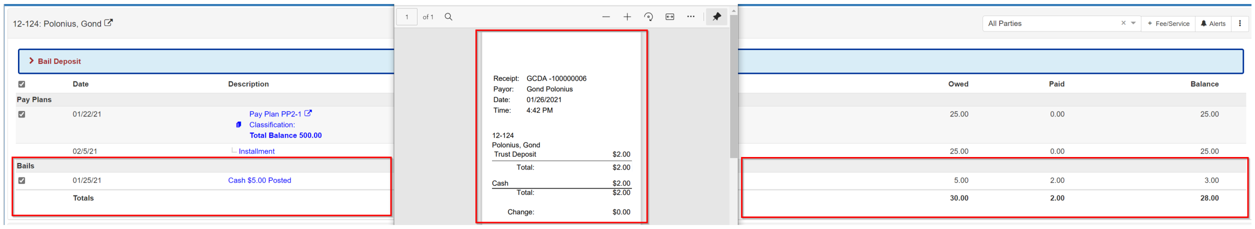


Navigate to **Cash Receipts** and pull up the case you are taking the payment on. It is easier to do this from the dropdown of the **Financial** tab from the **Case Record** as it loads **Cash Receipts** with the case pulled up. Select the **Bail** item under the **Bails** panel.

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]**.



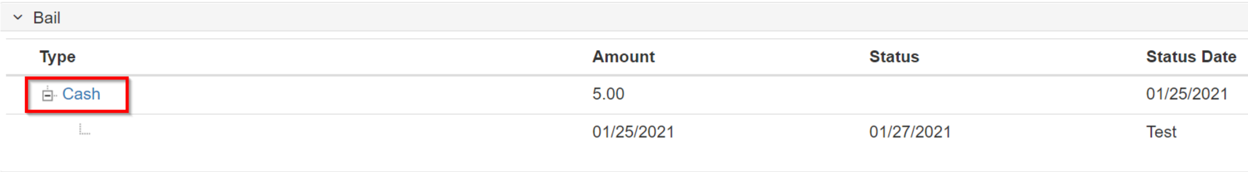
After taking the payment, the **Cash Receipts** screen refreshes and shows an indicator that there is a **Bail Deposit** on the case. Also, a **Cash Receipt** popup window shows giving you the payment information. In the following example, part of the **Bail** is paid.



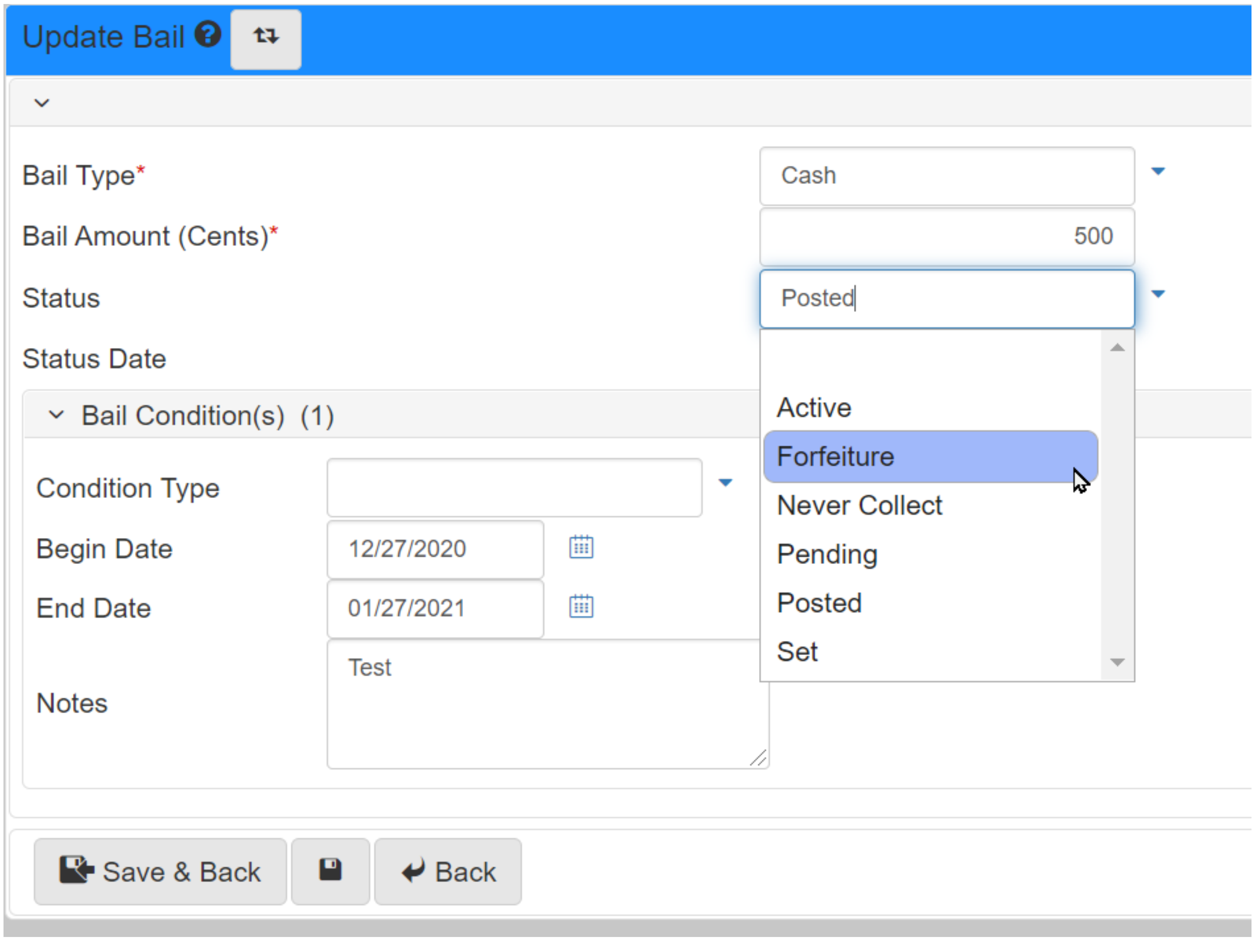
The **Case Ledger** also shows the reflected **Bail** payment, which also shows in the case header.

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:



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



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.

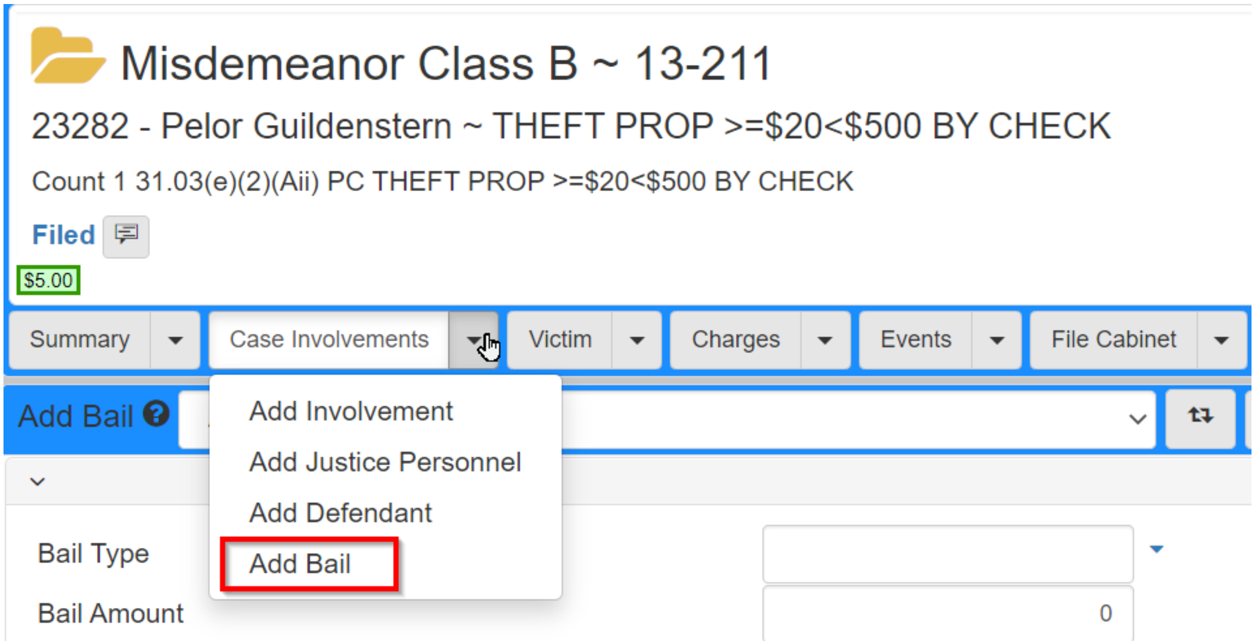
Refunding cash bail

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.

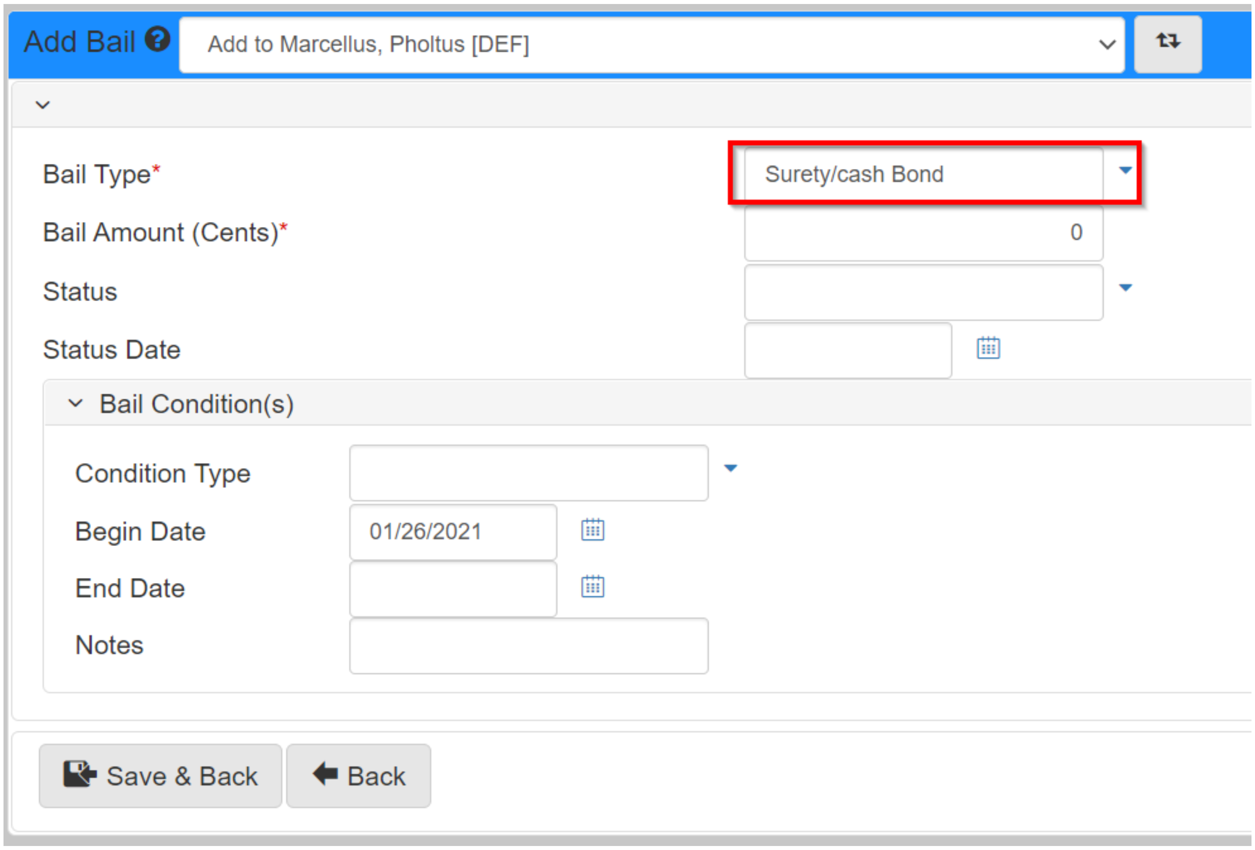
Bail bond/surety

Creating bail bond/surety

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



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



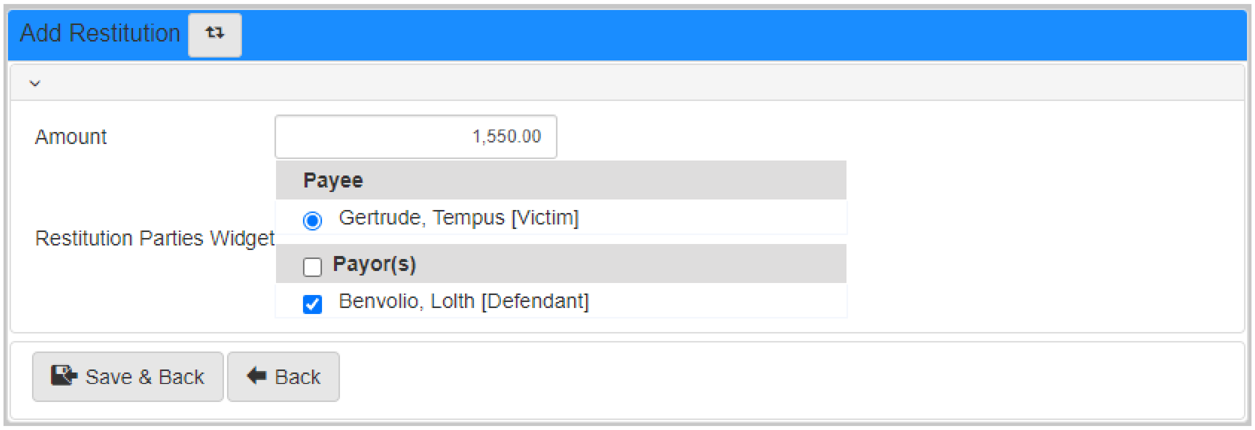
Once you have entered the data, click **[Save & Back]**. The set **Bail** shows on the bottom of the **Case Involvement** screen.

Restitution

Add restitution to a case

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

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



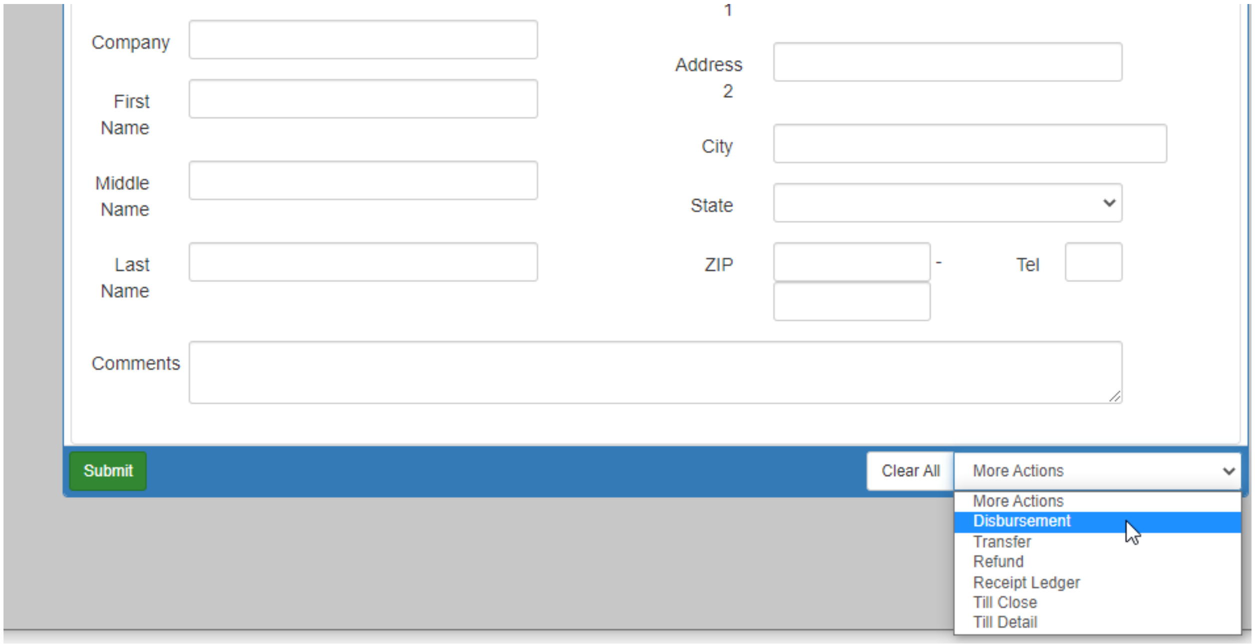
Taking a restitution payment

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.

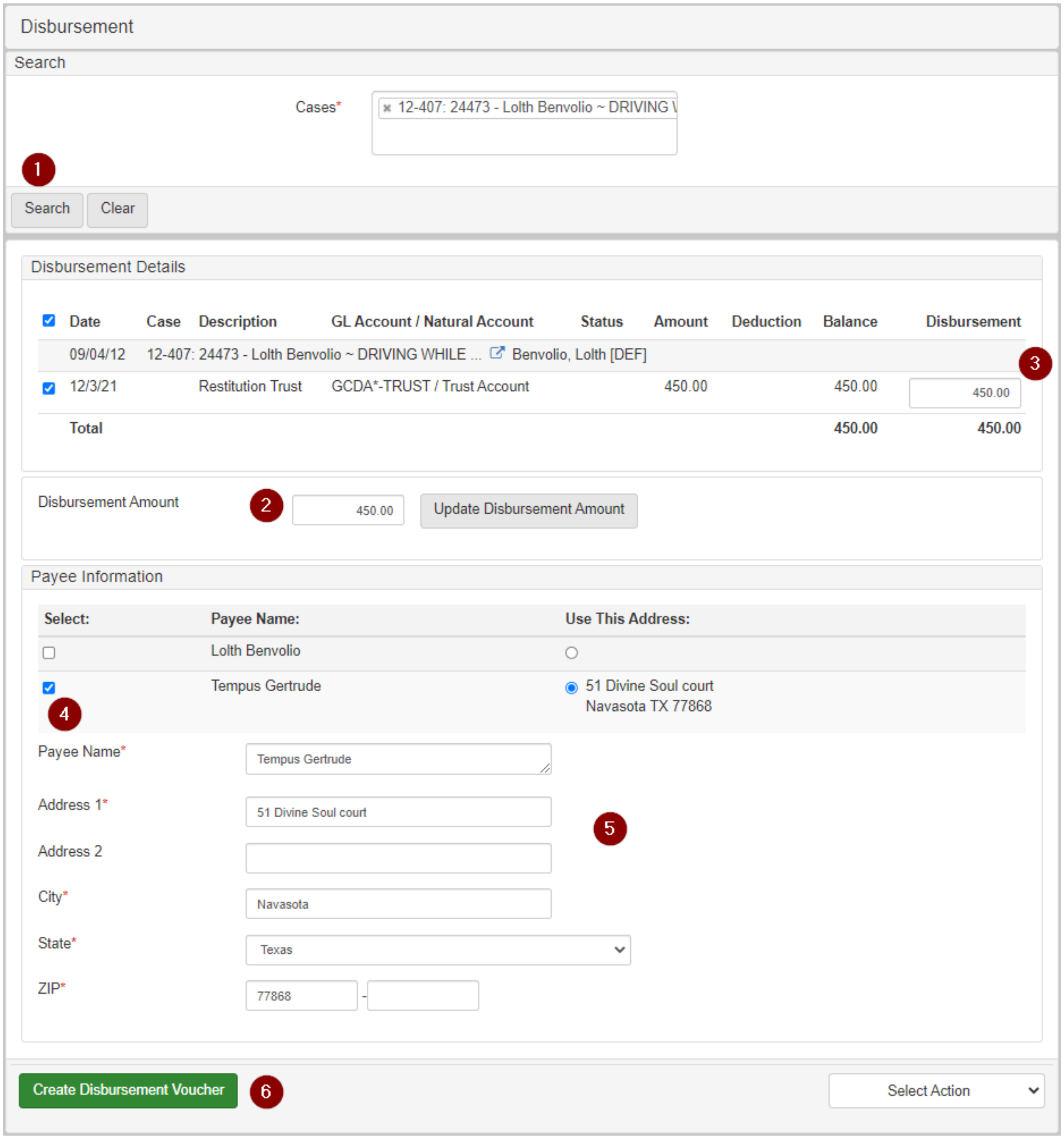
Disbursing restitution

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**:

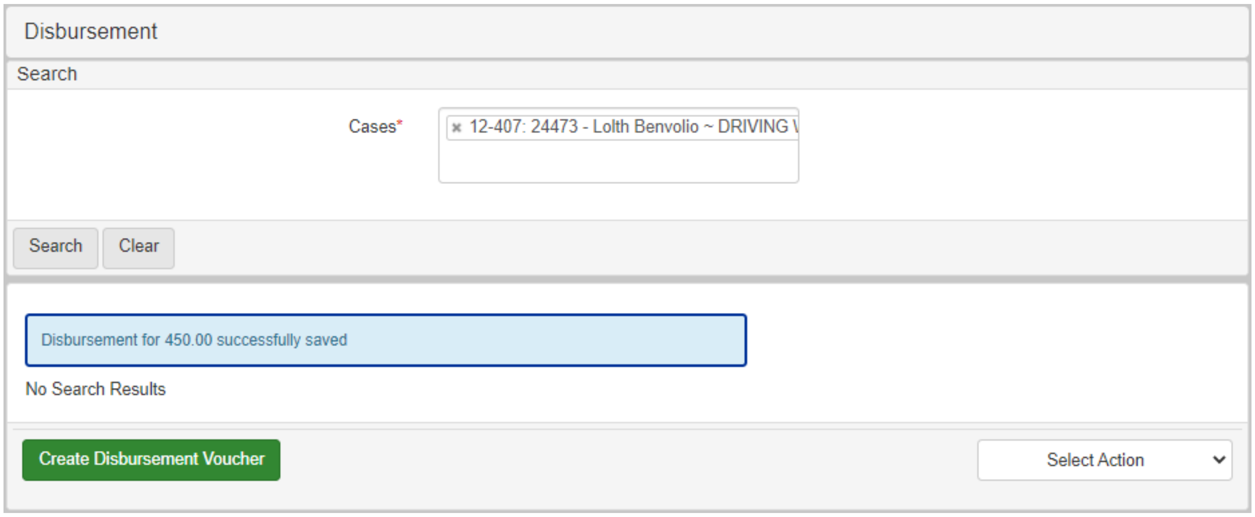


This **Disbursement** screen shows. To create a disbursement:

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.



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



Writing a check

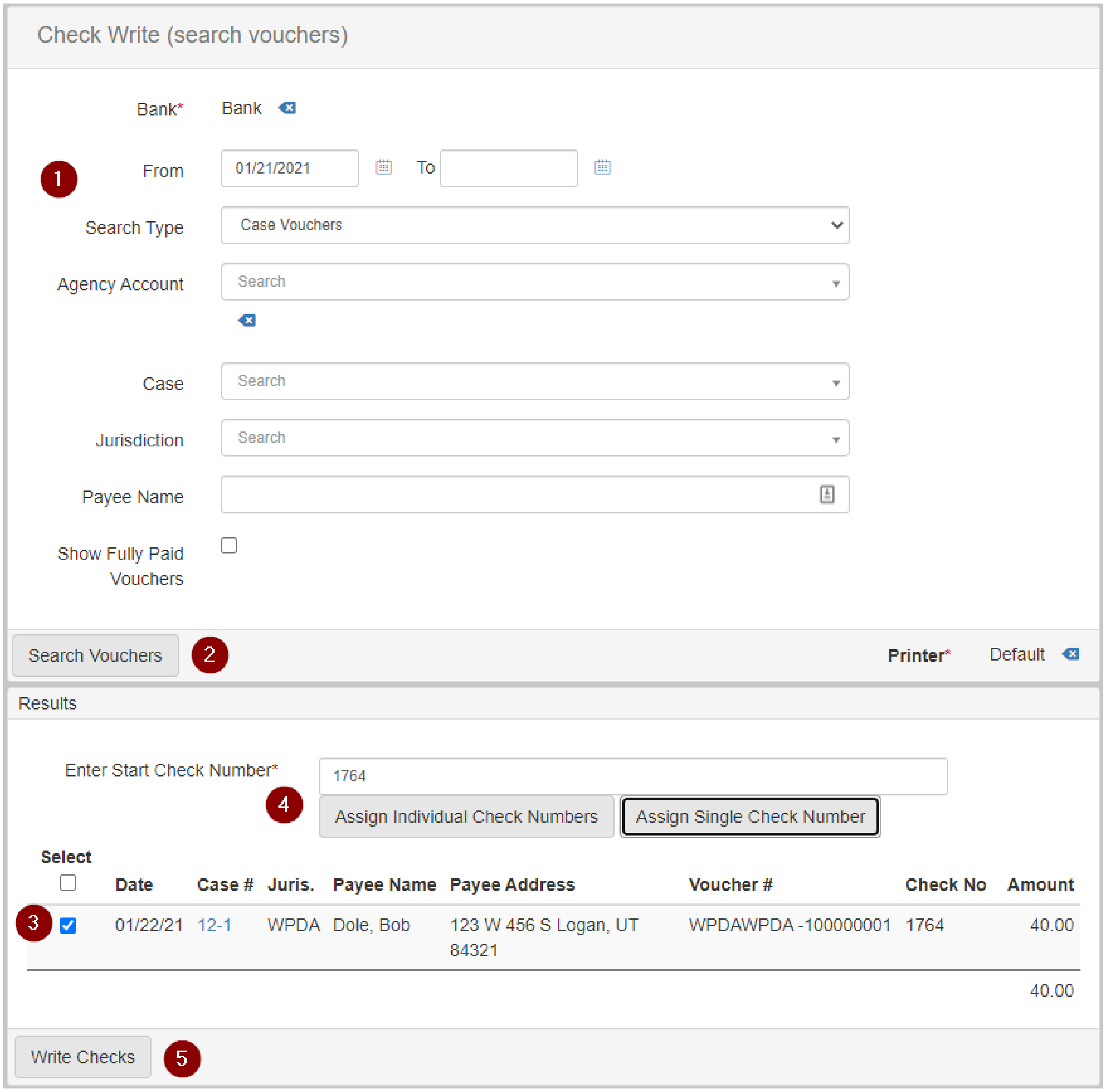
After a disbursement is successfully created, a check for the restitution can be written to the payee.

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



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.

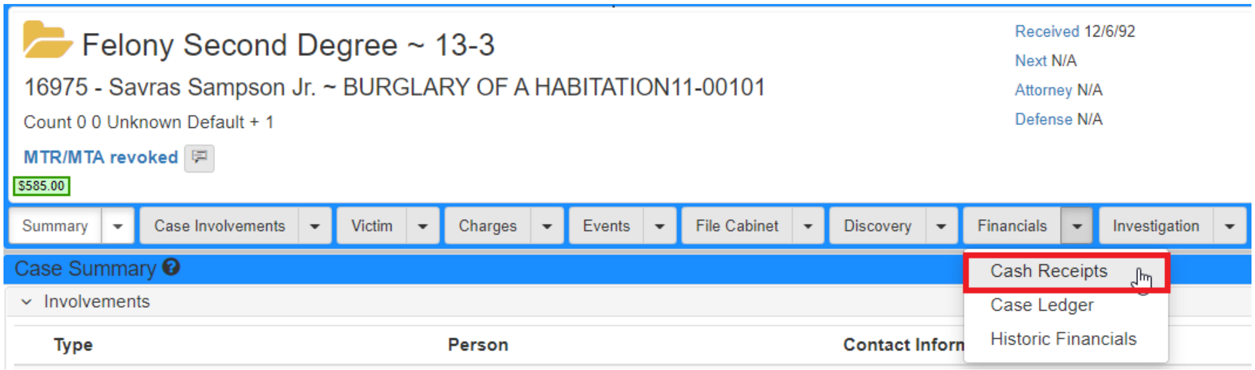
Transfers

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.

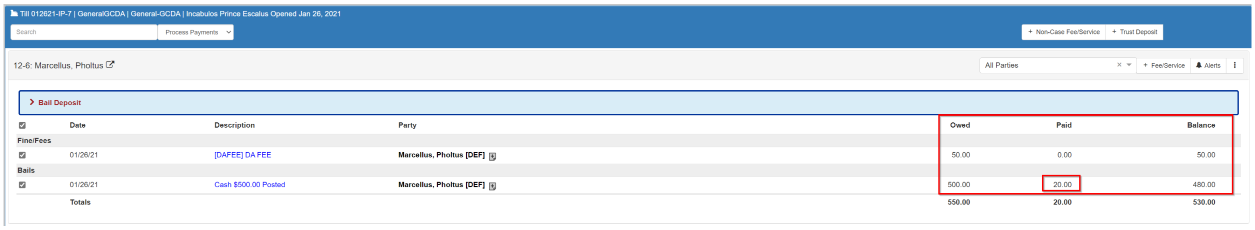
Creating a transfer: between single case obligations

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

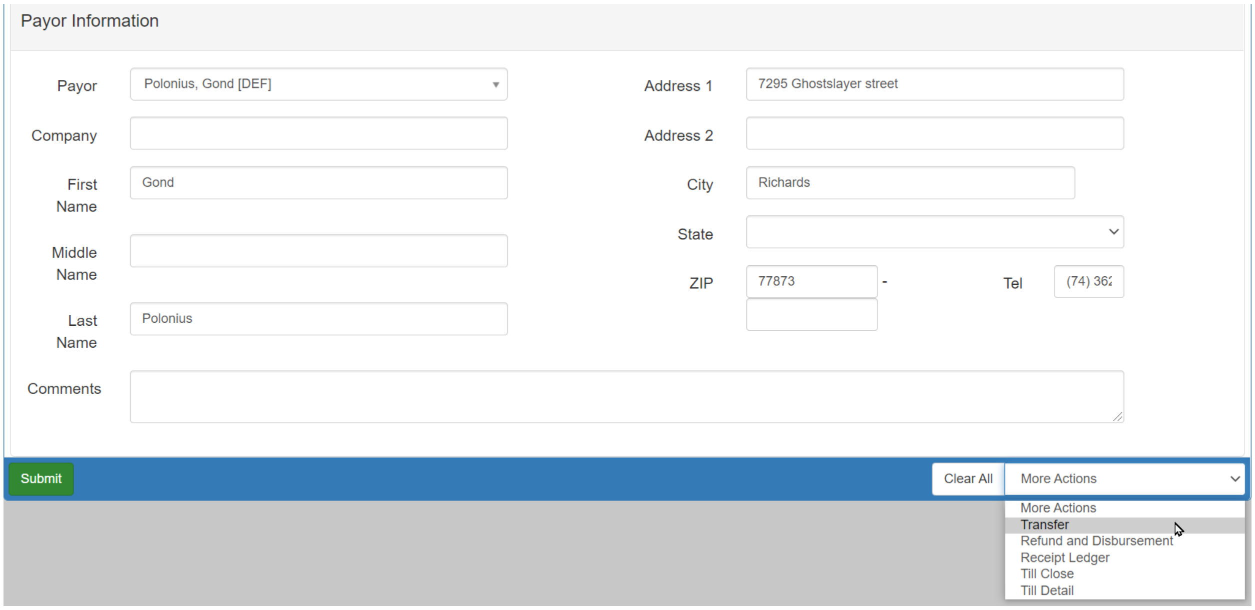
Navigate to the **Cash Receipts** screen from the case: click the **Financials** dropdown, then select **Cash Receipts**.



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



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



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.

Click **[Next]**.

Step 2: items receiving money

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

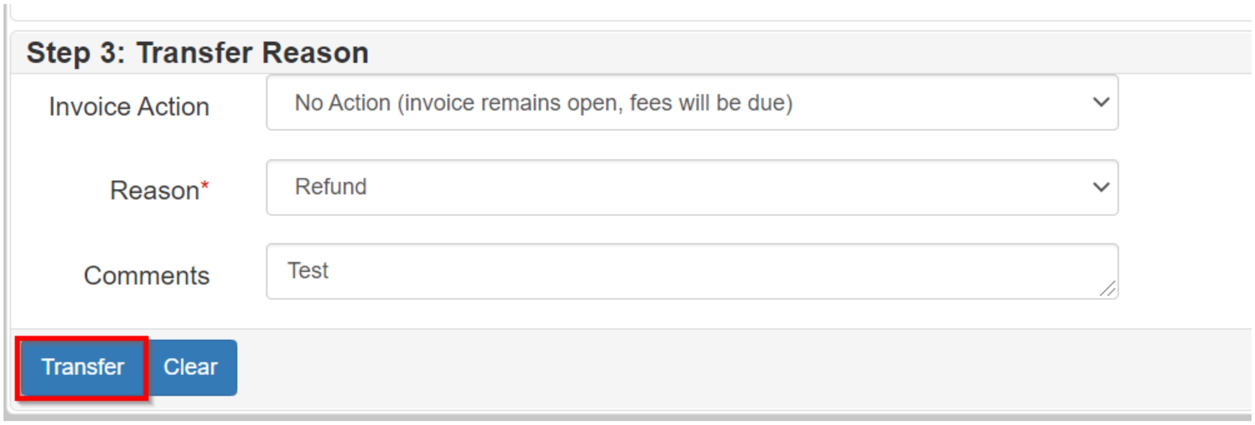
In this example, money should be moved from one obligation to another. In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations, if needed.

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:

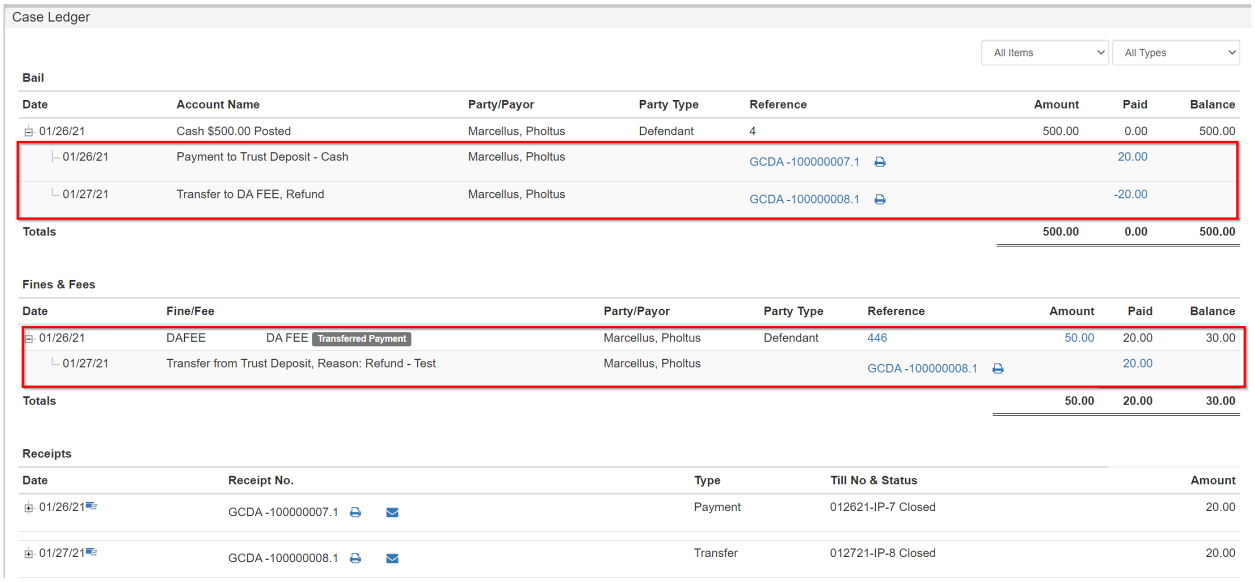
Step 3: transfer information

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



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**.

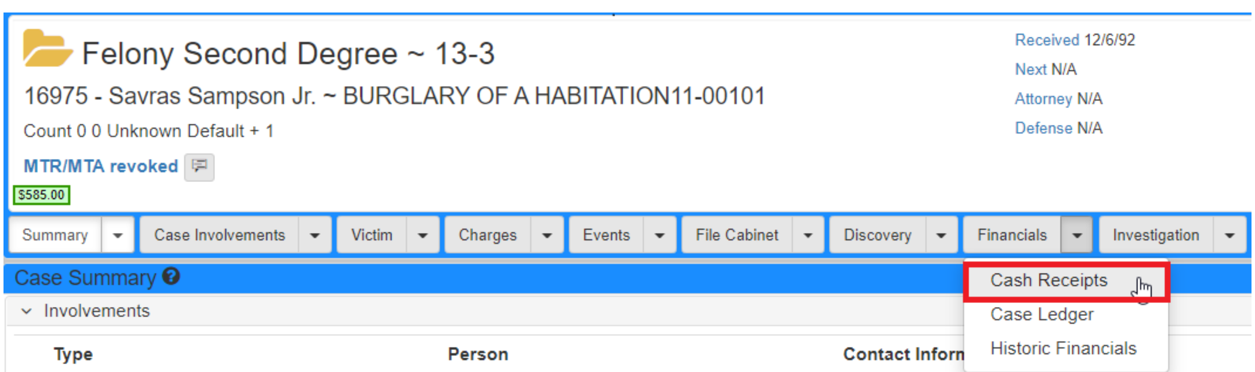


There should also be a receipt in reference to the transfer.

Creating a transfer: case-to-case transfers

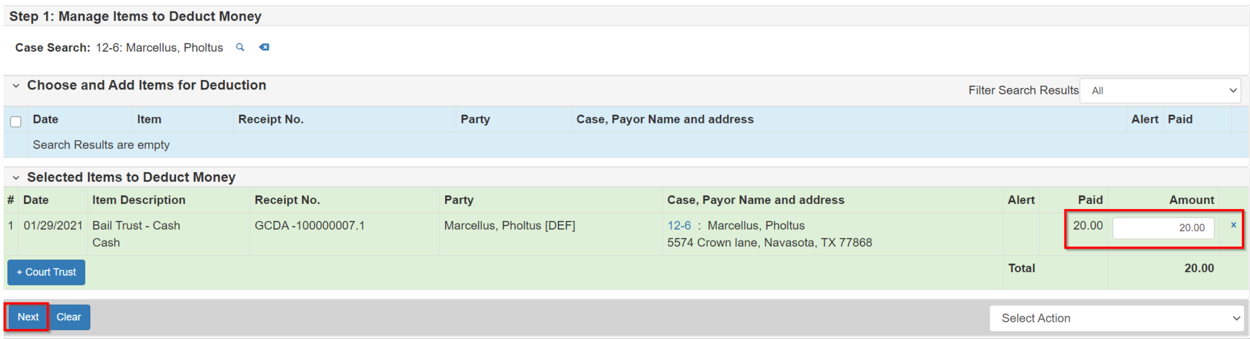
For this example, assume that a payment is made to an obligation on the wrong case and it must be applied to another case. To start fixing that scenario, use the same exact case as in the previous example, so there is $20.00 on the **Bail** paid.

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



Step 1: items deducting money

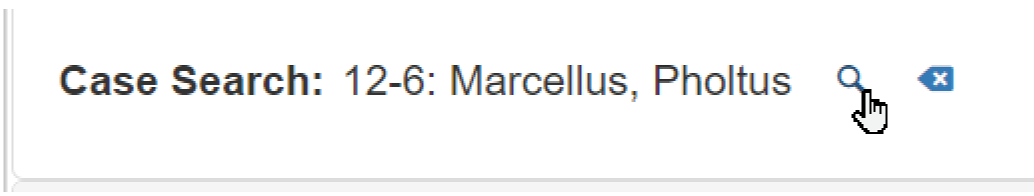
On the **Transfer** screen, there should be a case with paid financials. If you accessed the screen from some other location and do not find a case, search for the case you need to transfer funds from. Payments made on this case should show here in **Selected Items to Deduct Money** panel.



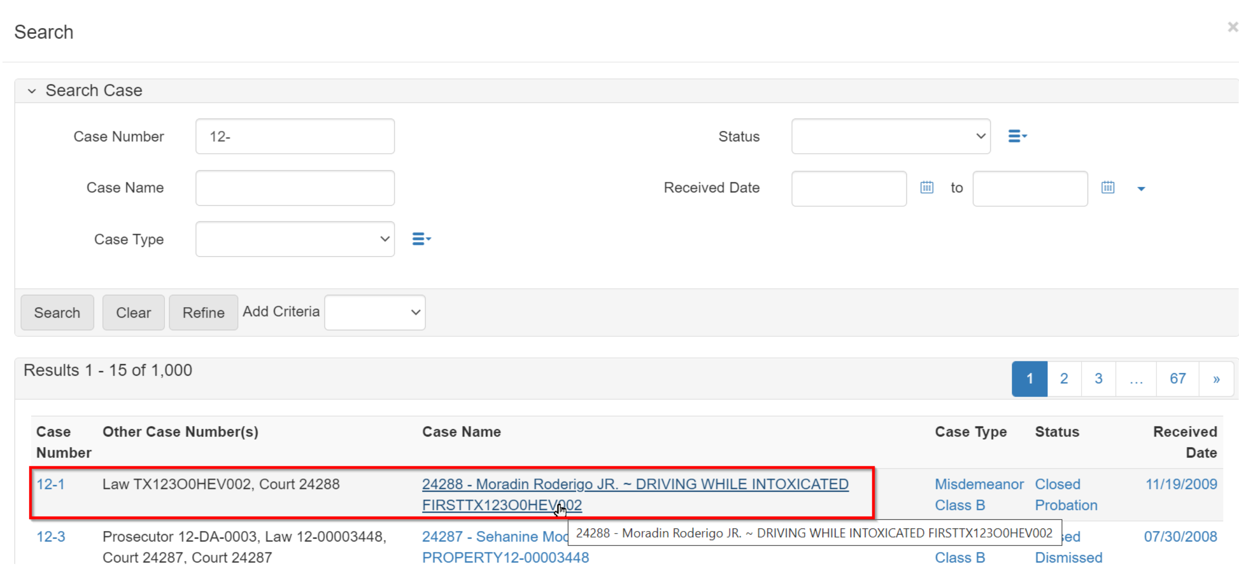
Click **[Next]**. An extra panel shows after the first.

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.



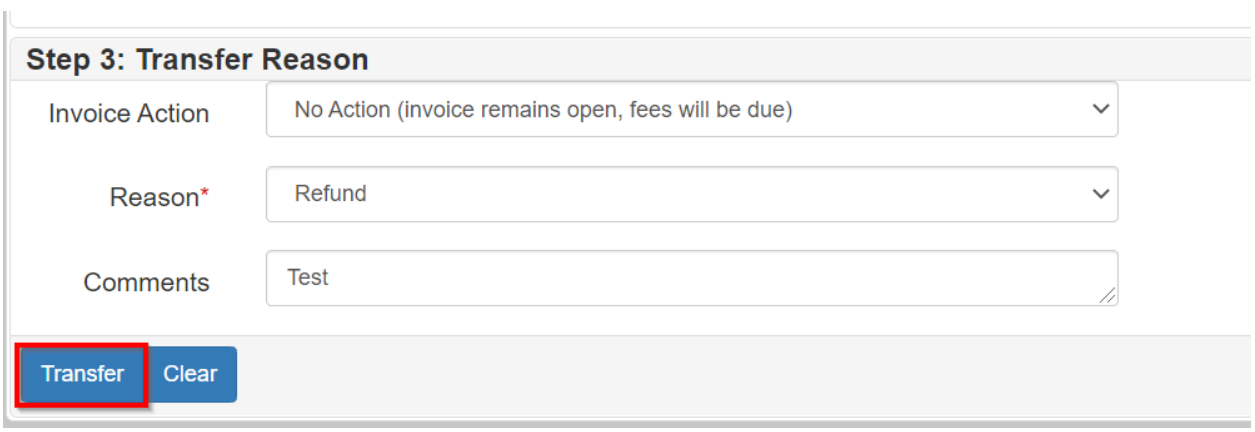
In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations.

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 3: transfer information

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



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		GCDA -100000007.1		20.00	
01/27/21	Transfer to DA FEE, Refund	Marcellus, Pholtus		GCDA -100000008.1		-20.00	
01/29/21	Transfer from DA FEE, Refund	Marcellus, Pholtus		GCDA -100000011.1 (Original: GCDA -100000008.1)		20.00	
02/2/21	Transfer to 12-25, Refund	Marcellus, Pholtus		GCDA -100000020.1 (Original: GCDA -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		GCDA -100000017.1		250.00	
01/29/21	Transfer to DA FEE, Refund	Gertrude, Chauntea		GCDA -100000018.1		-25.00	
02/2/21	Transfer from 12-6, Refund	Marcellus, Pholtus		GCDA -100000020.1 (Original: GCDA -100000007.1)		20.00	
Totals					**250.00**	**245.00**	**5.00**

Refunds

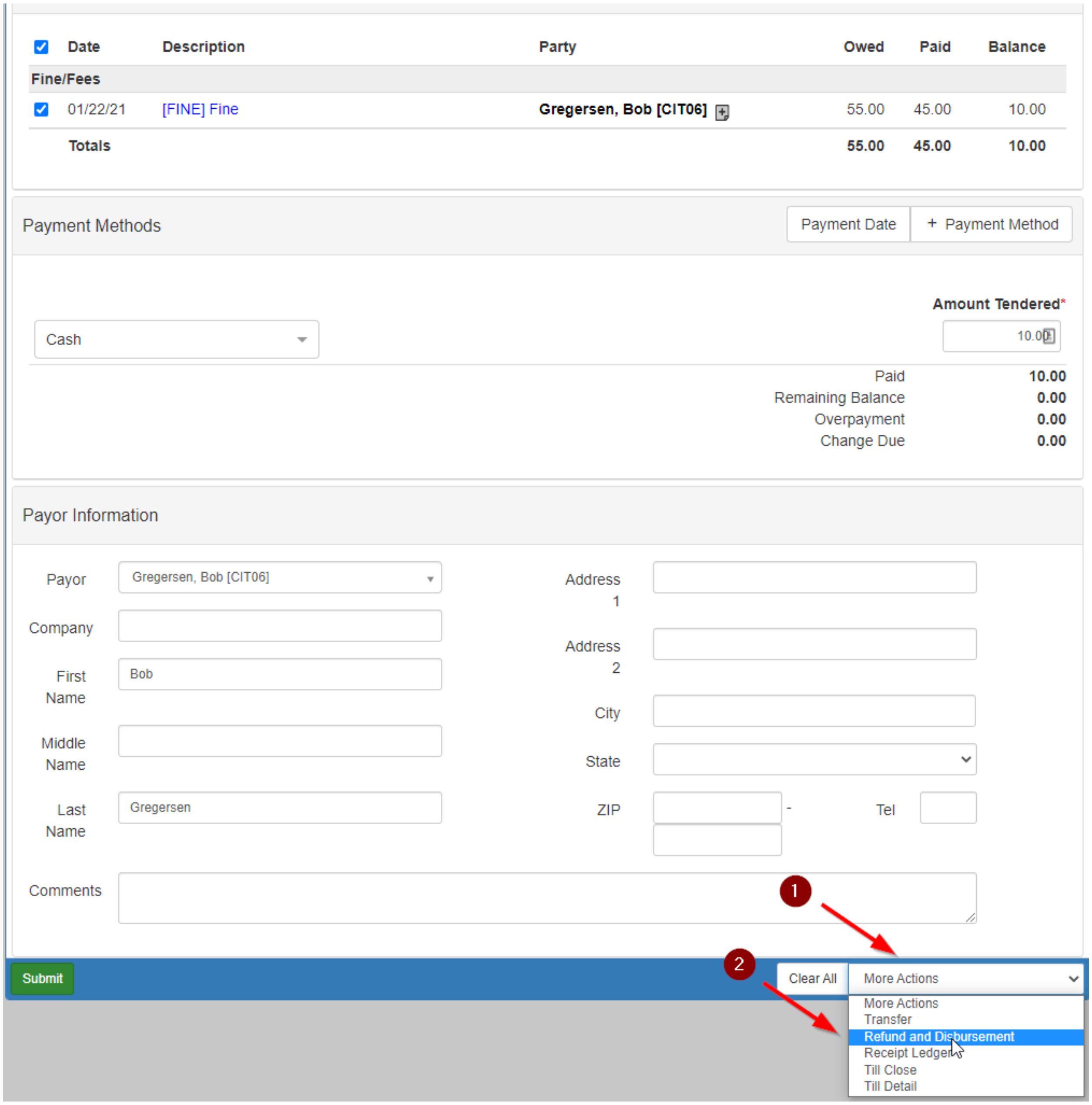
A refund can be given when money needs to be returned to an individual that has already paid a fine or fee on a case.

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.

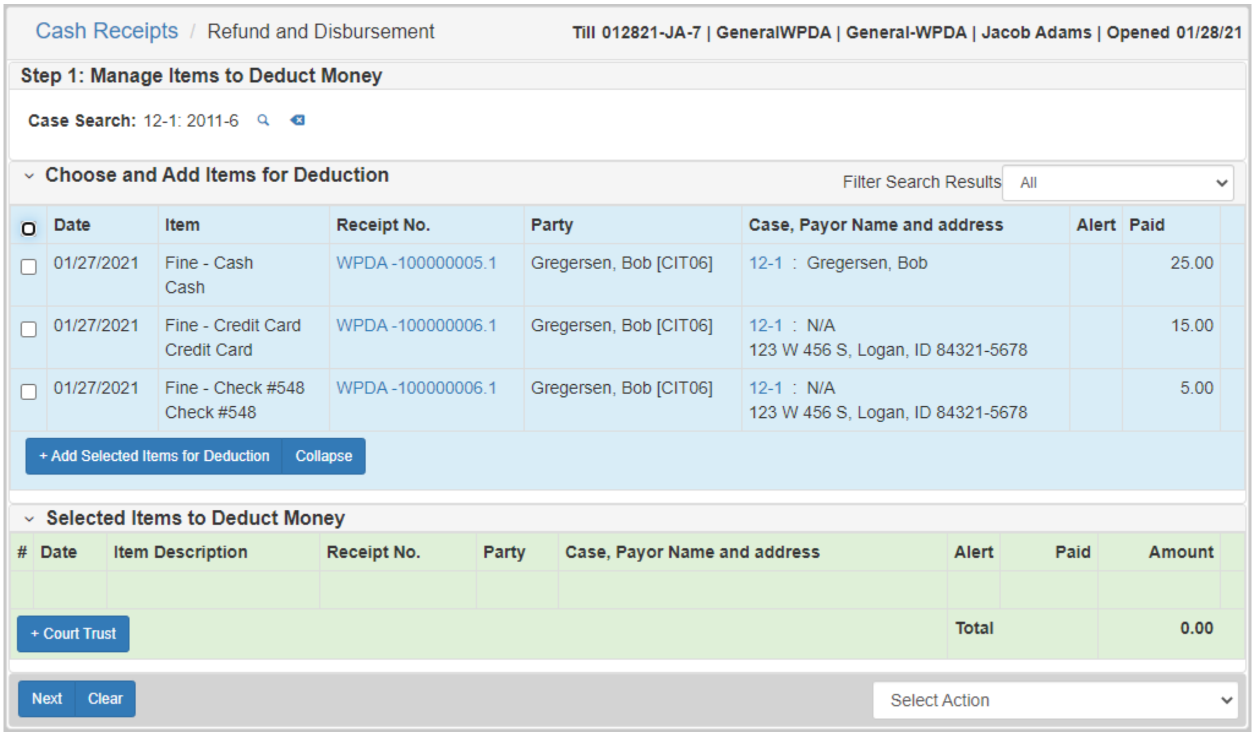
Navigate to refunds

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



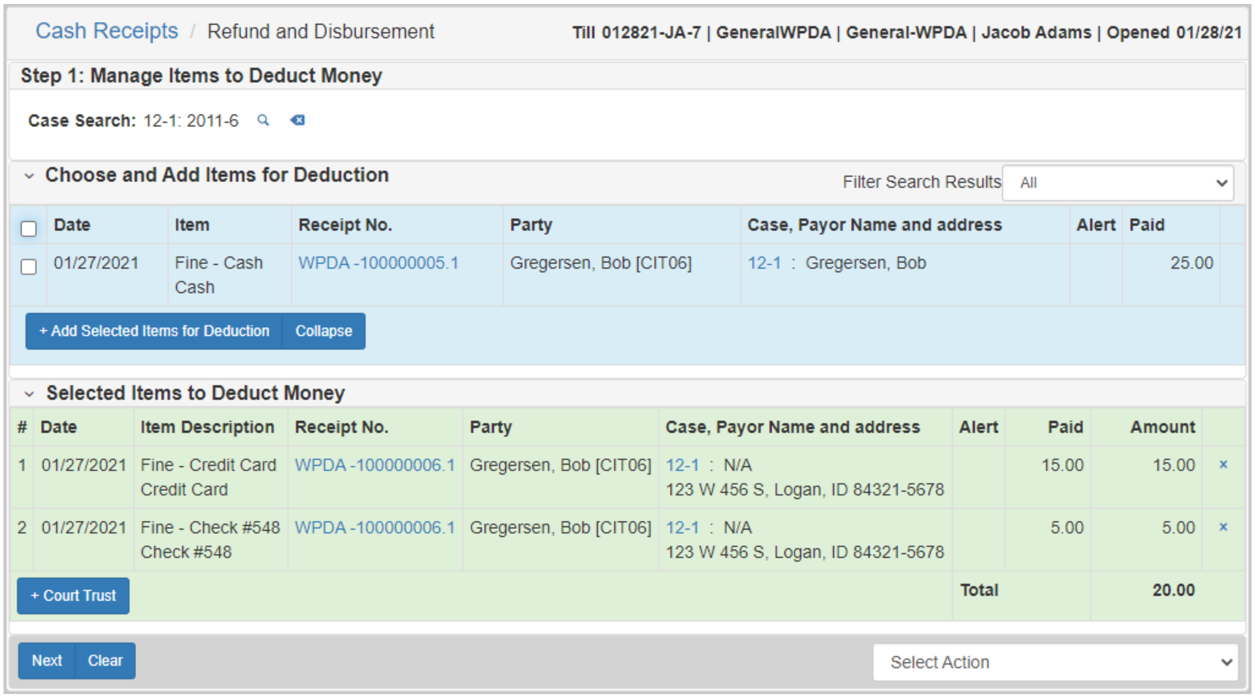
Create a refund request

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



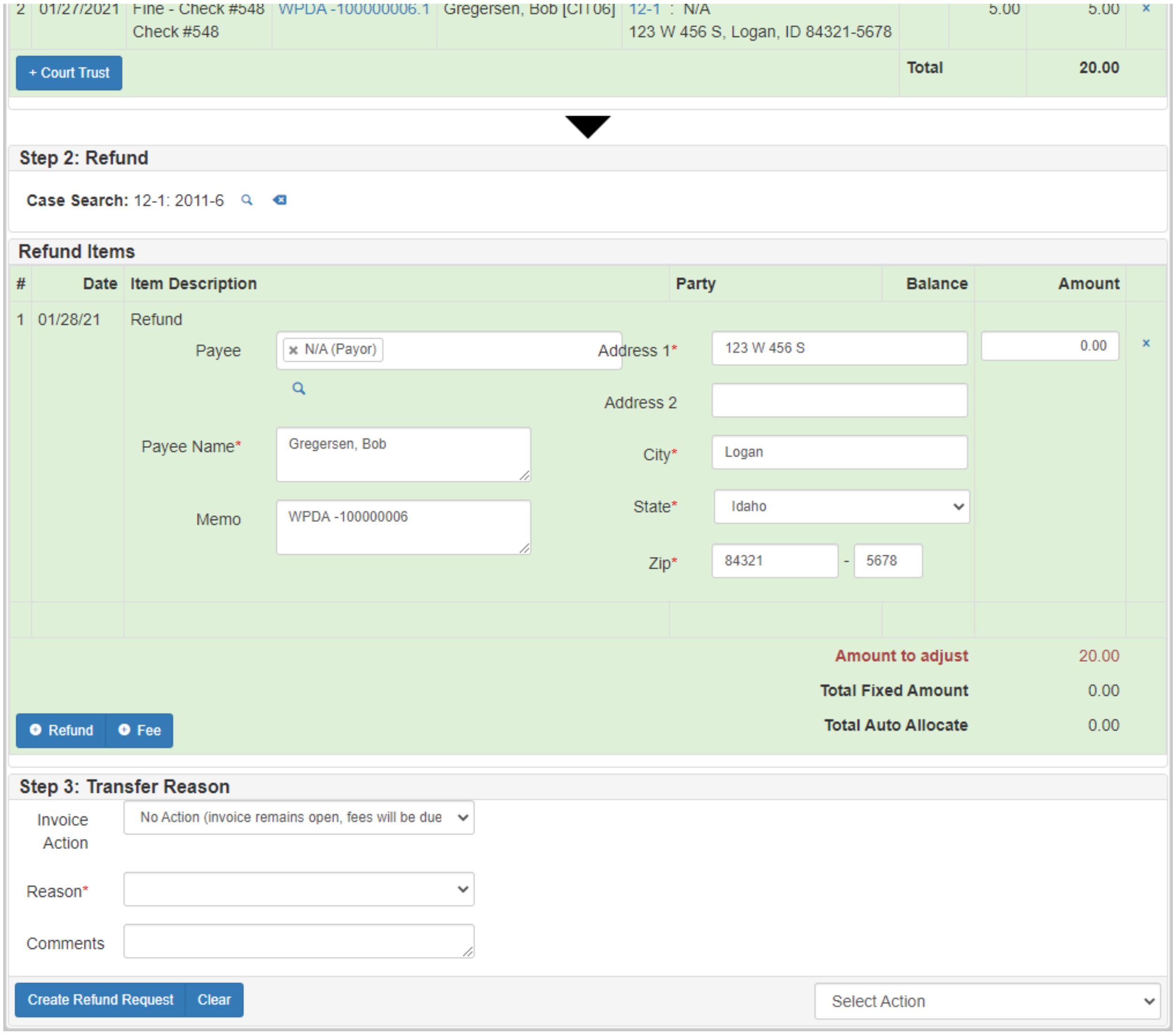
Start the refund by selecting the case payments that you would like to include in the refund. Do that by selecting the checkbox next to each payment to include.

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



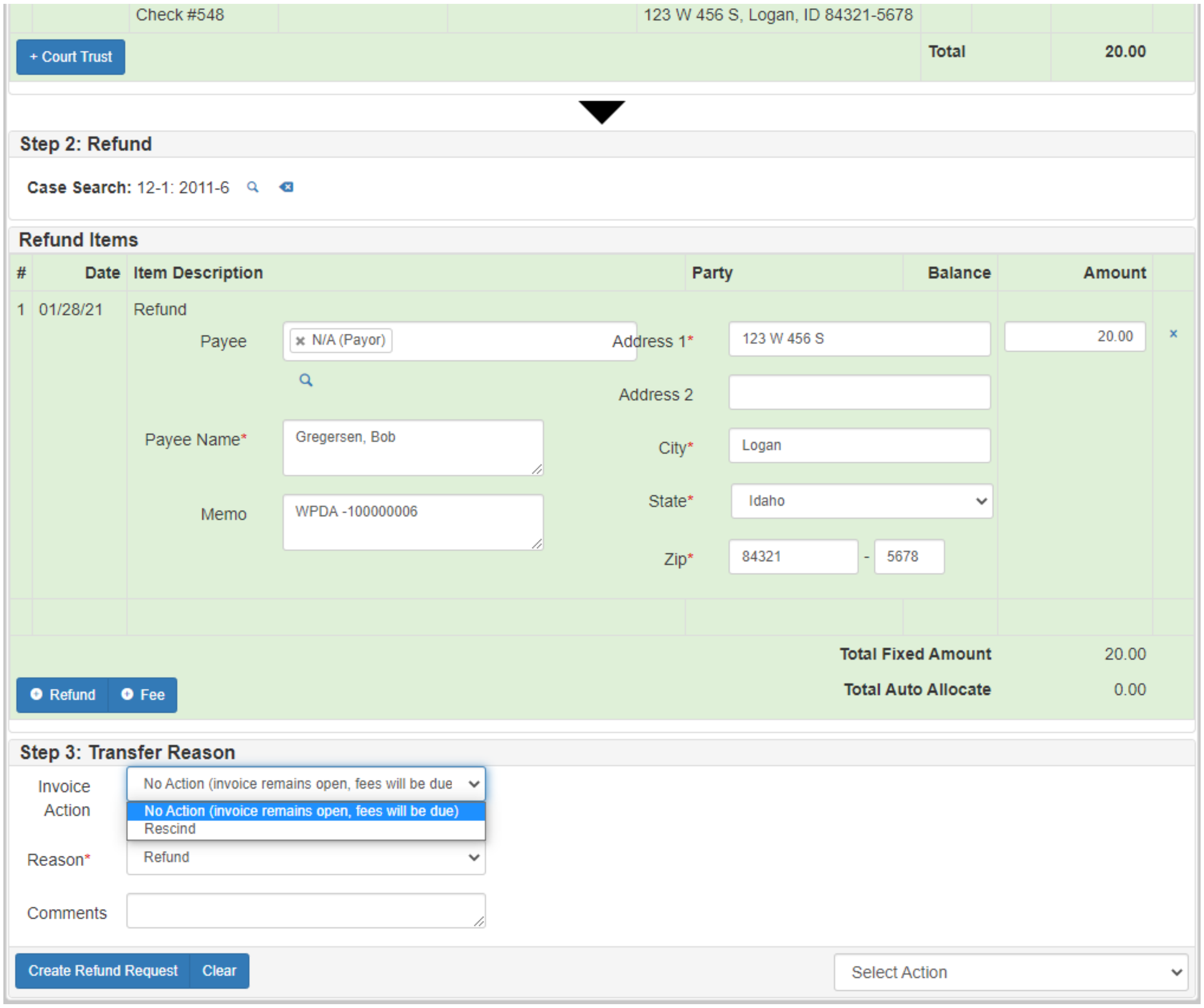
The payments are added to the **Selected Items to Deduct Money** section. Review the payments and verify that everything is correct.

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



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]**.

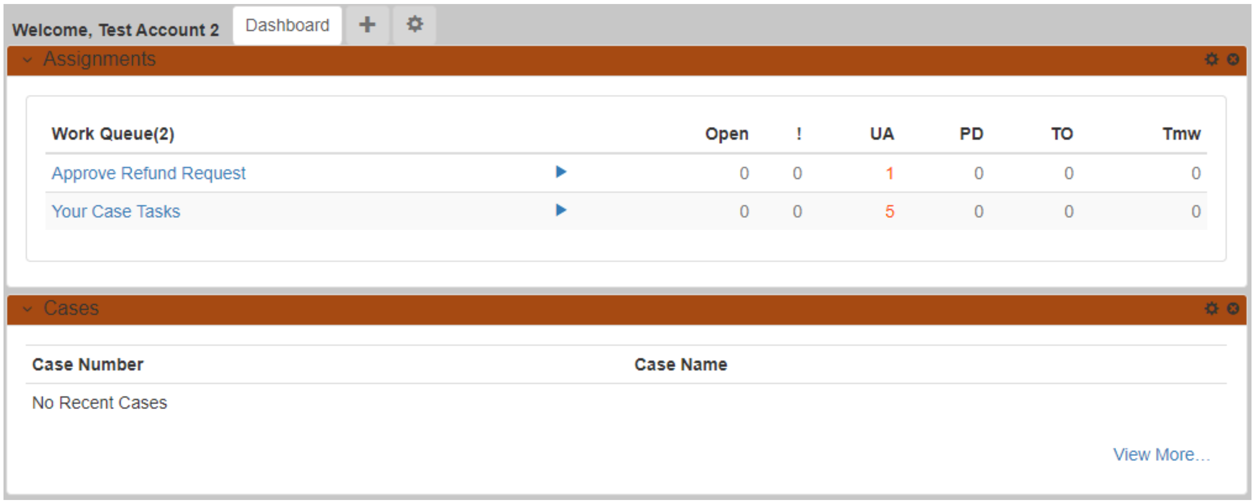


To complete the refund request, enter an invoice action (**No Action** or **Rescind**), enter the reason for the refund, and optionally add comments about the refund. After filling in the required information, click **[Create Refund Request]** to create the refund request that somebody else must approve.

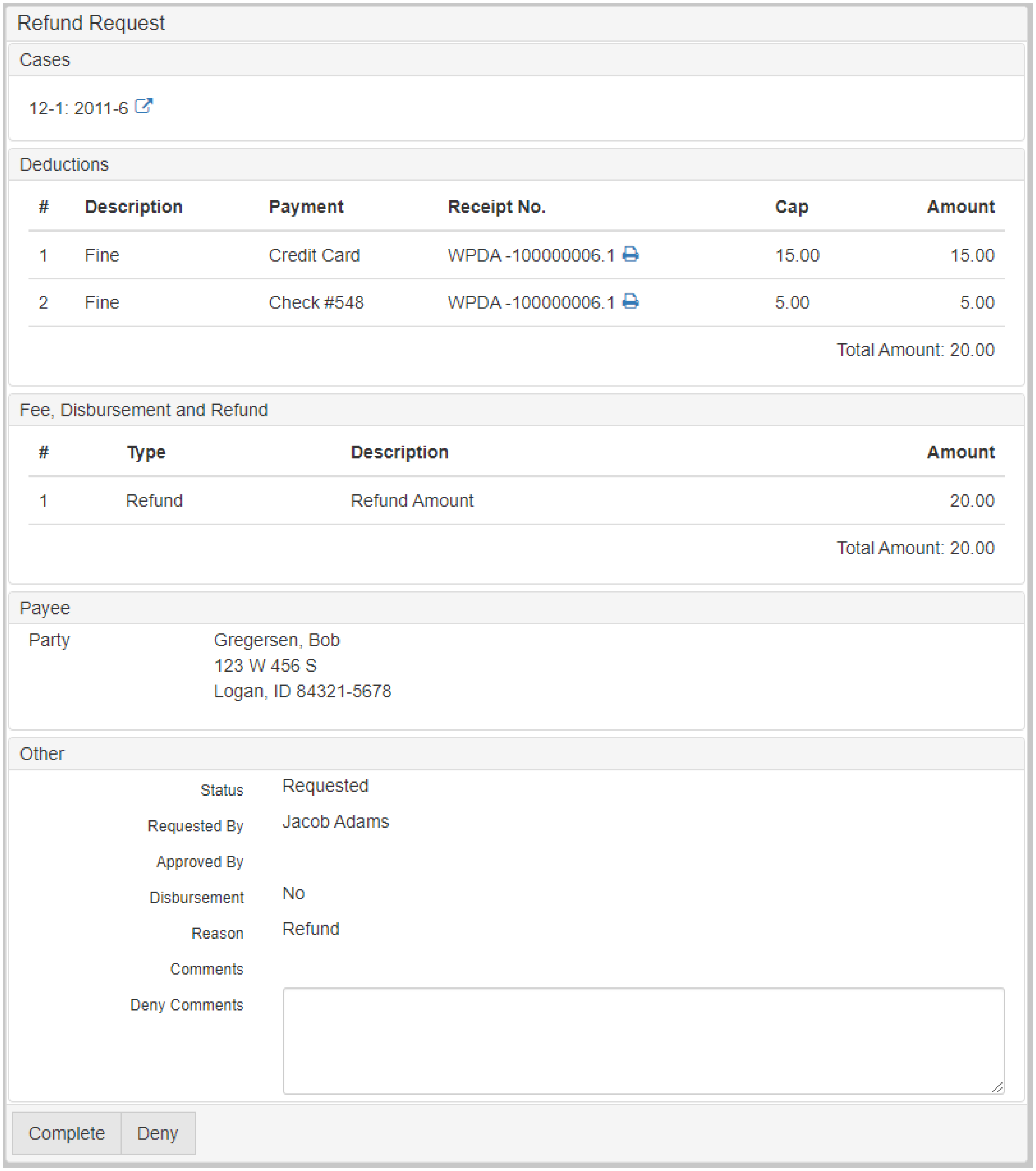
Approve a refund request

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**:



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	

Complete 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]**.

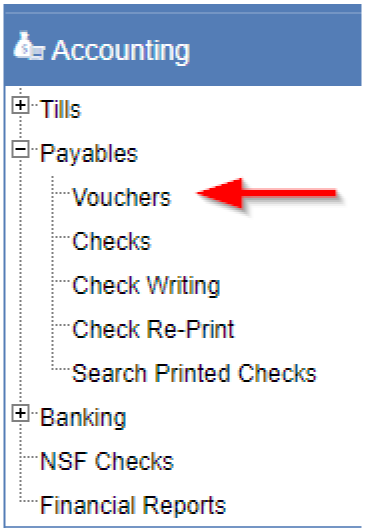
Once a refund request is approved, the refund can be sent to the payee.

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.

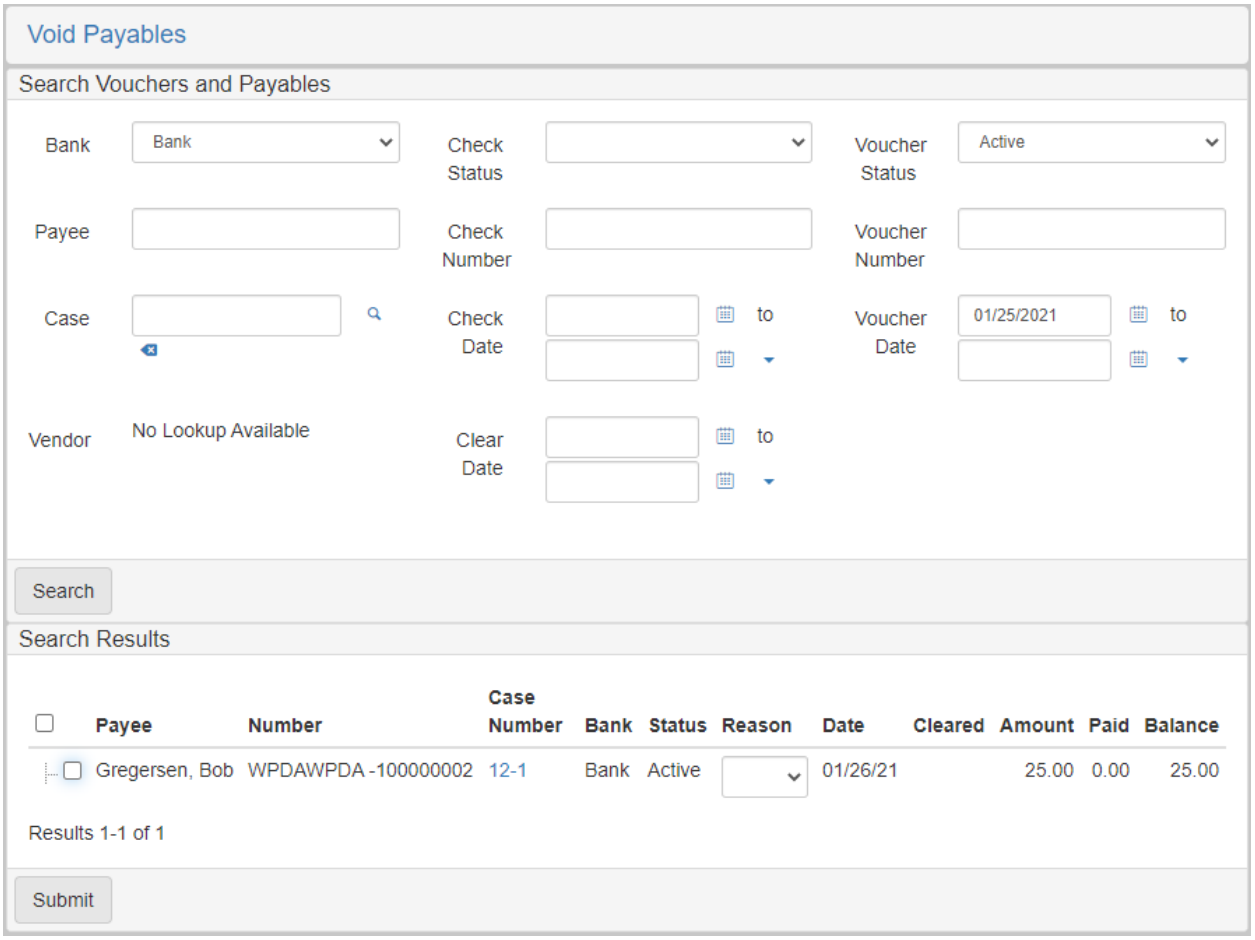
Vouchers

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



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

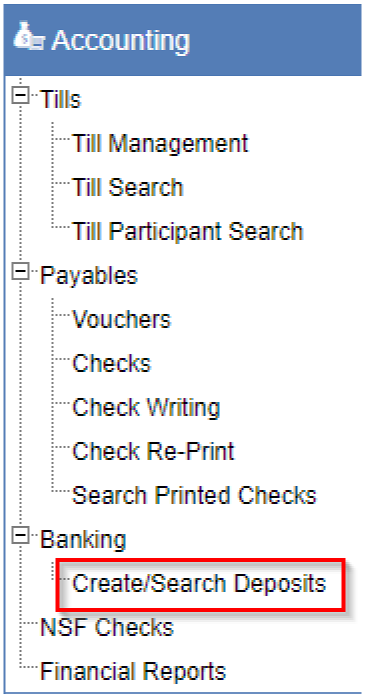
To write a check for an existing voucher, refer to https://documentation.journaltech.com/eAttorney/user/financials/check_writing.html.

Deposits

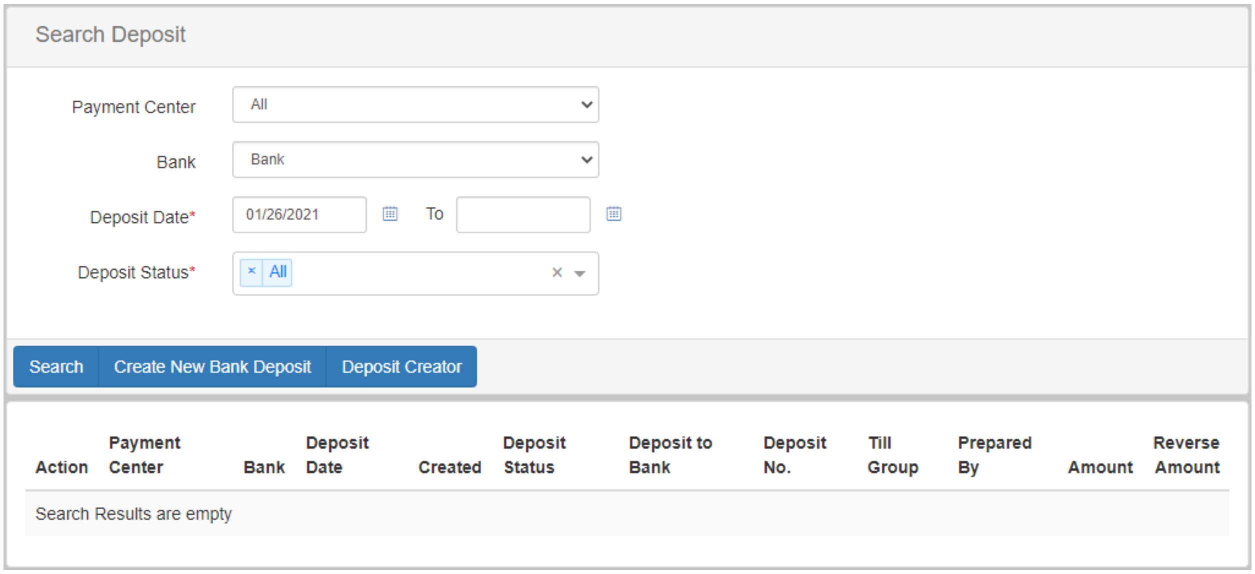
Deposits are used to record money taken to the bank. Individual tills are added to a deposit and all the money in each till makes up the deposit total.

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:

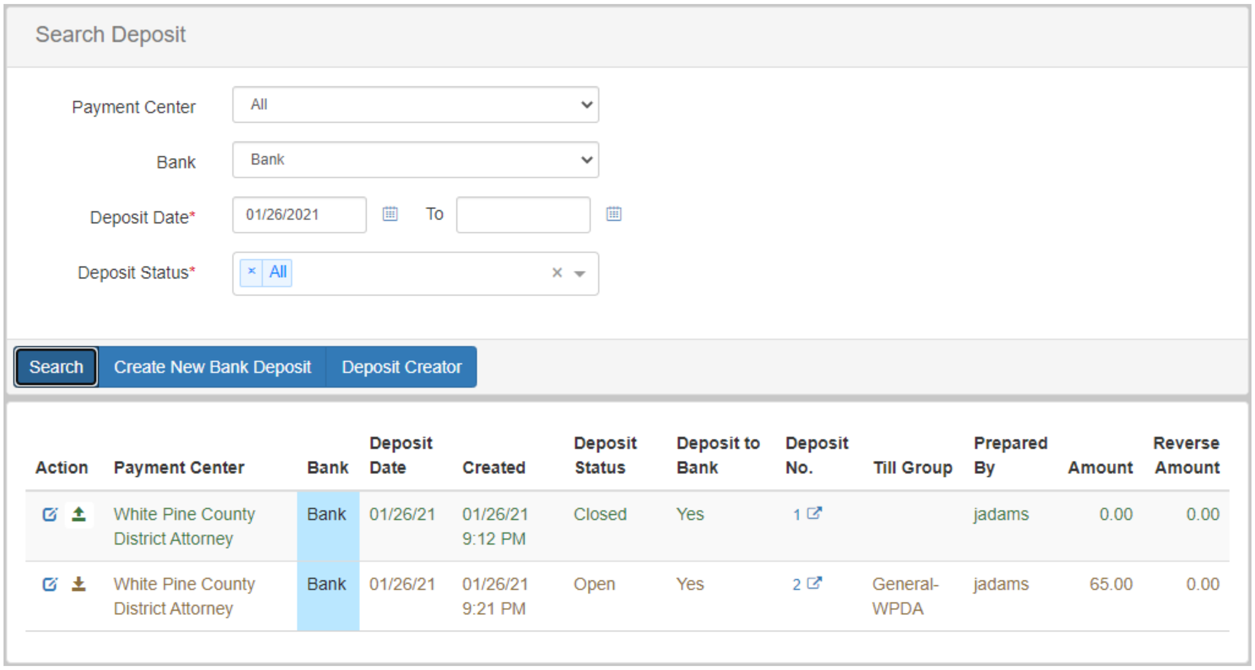


On this screen, you can create new deposits and search for and edit existing deposits.

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:



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

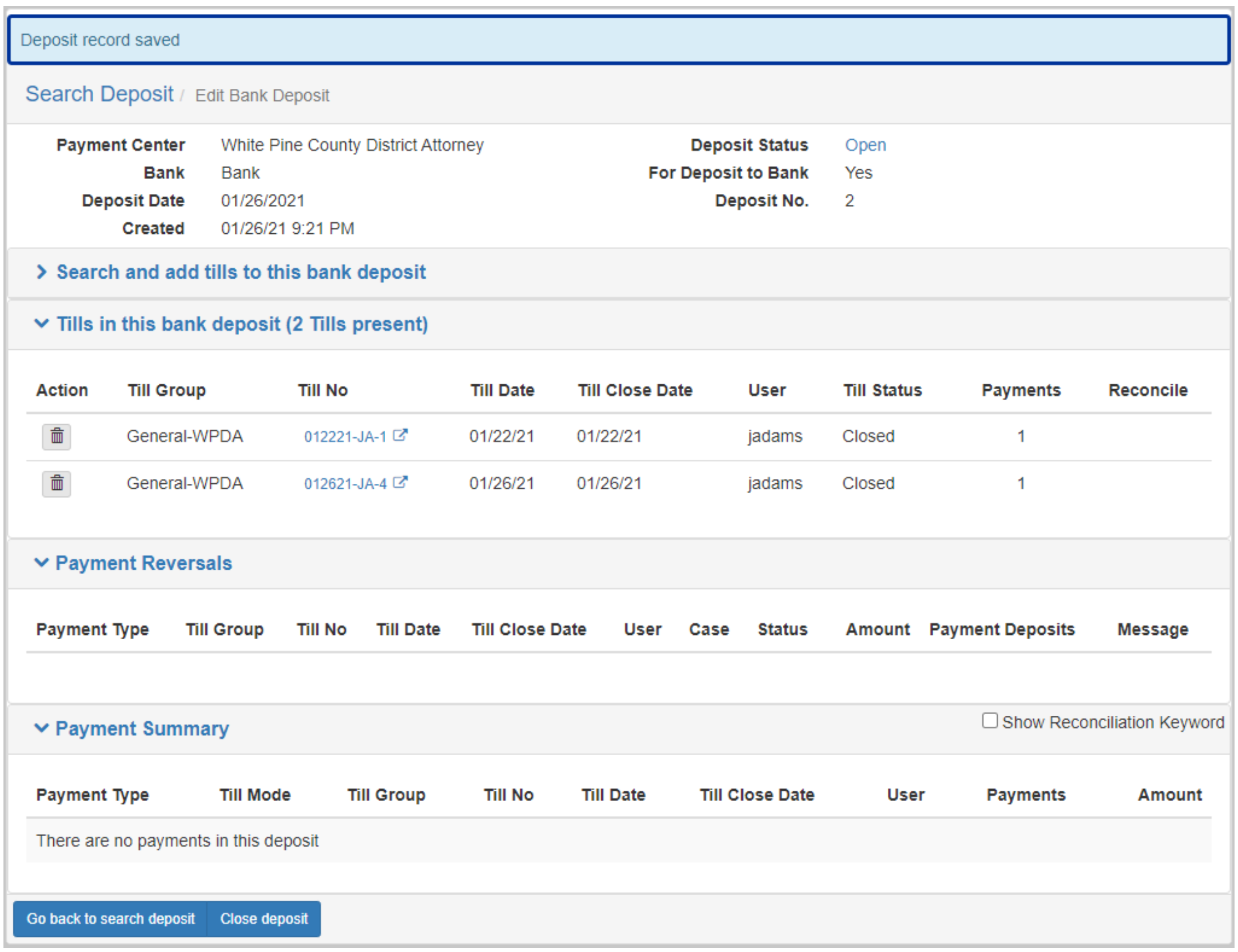
- View the details of the deposit.
- Click the link in the **Deposit No.** column to open the Deposit Details screen.
- Click the up or down arrow in the **Action** column to reopen or close a deposit.

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.



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]**.

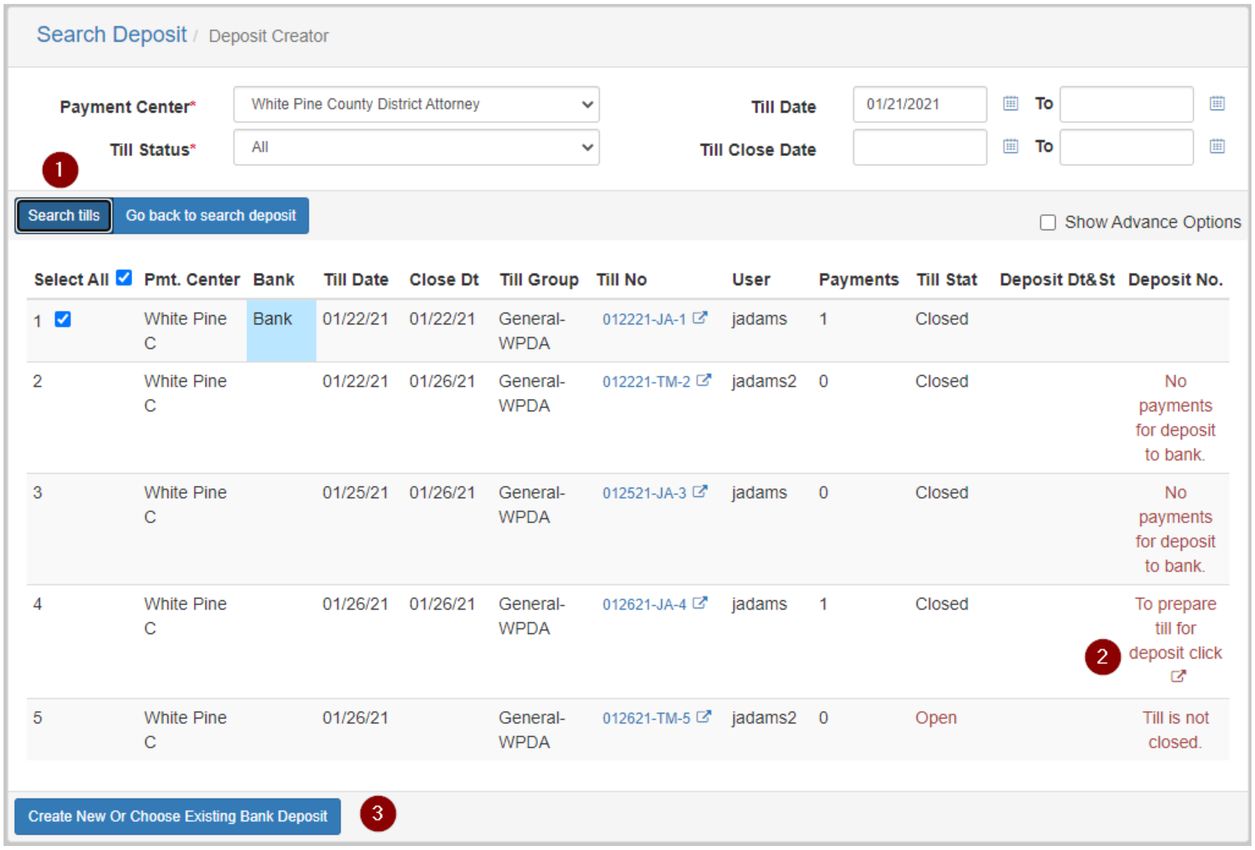
Create a deposit

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.



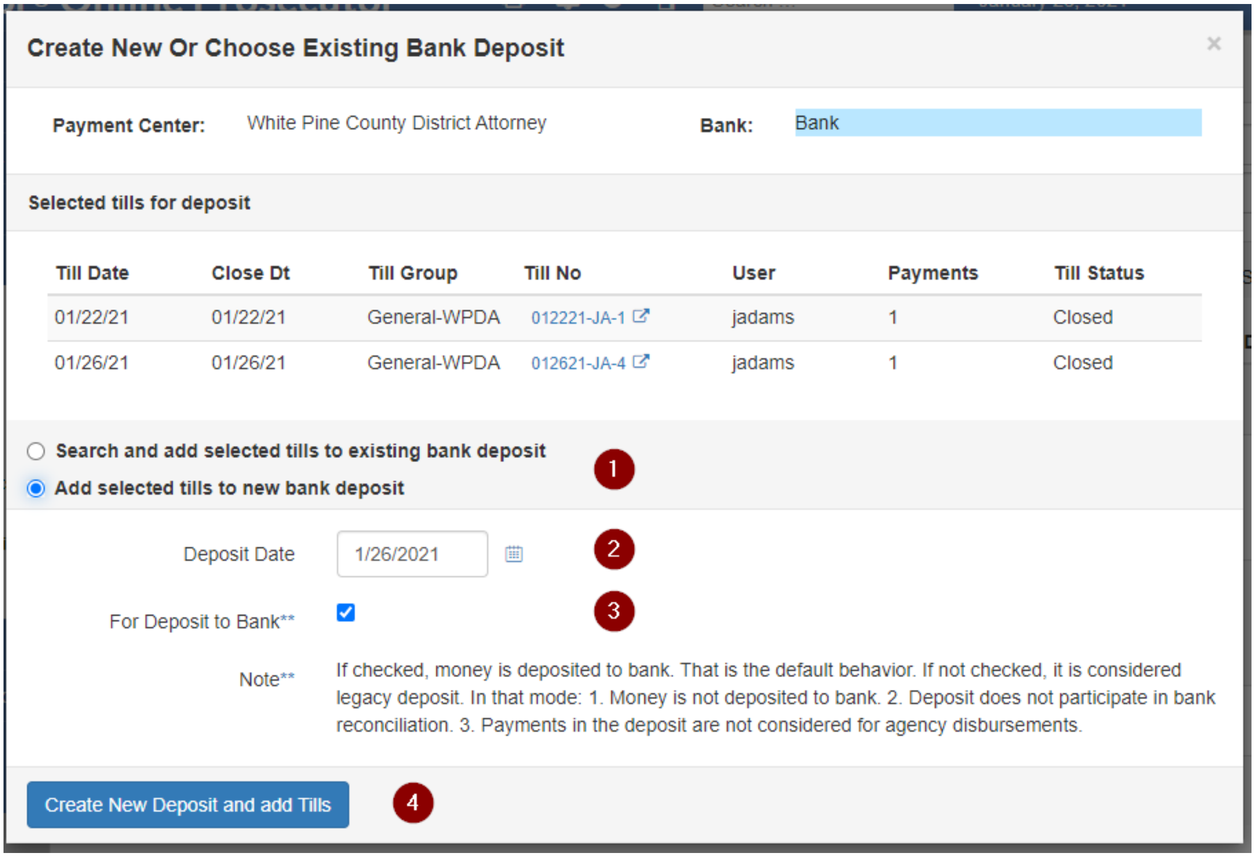
To add the tills to the **Deposit**, follow these steps:

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**.

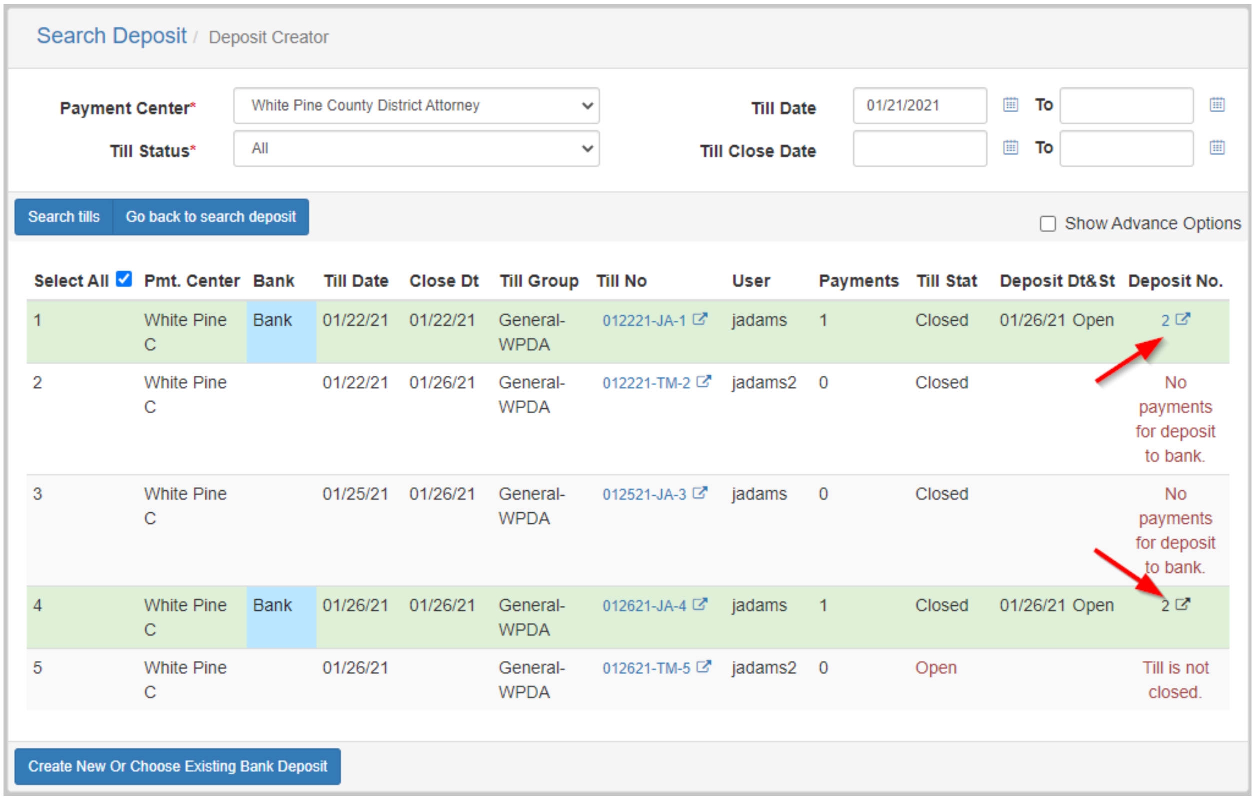
After selecting the tills you want to add to the deposit, you can then choose to add the tills to an existing **Deposit** record, or create a new deposit. The following screenshot shows how to create a new deposit:



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

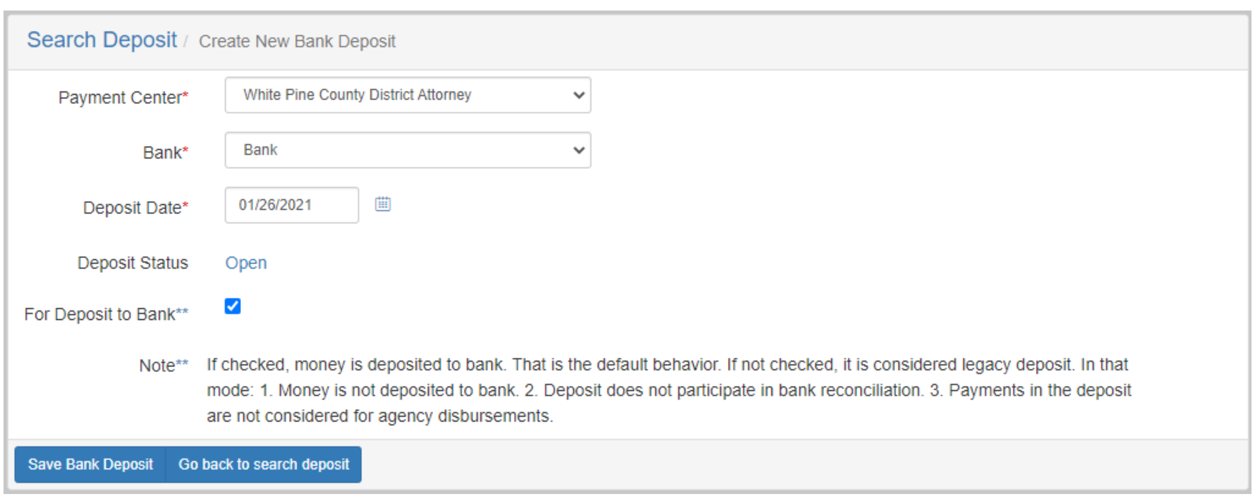
1. Select **Add selected tills to new bank deposit**.
2. Select the **Deposit Date**.
3. If the **Deposit** should participate in bank reconciliation, select **For Deposit to Bank**.
4. Click **[Create New Deposit and add Tills]** to create the **Deposit** record.

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:



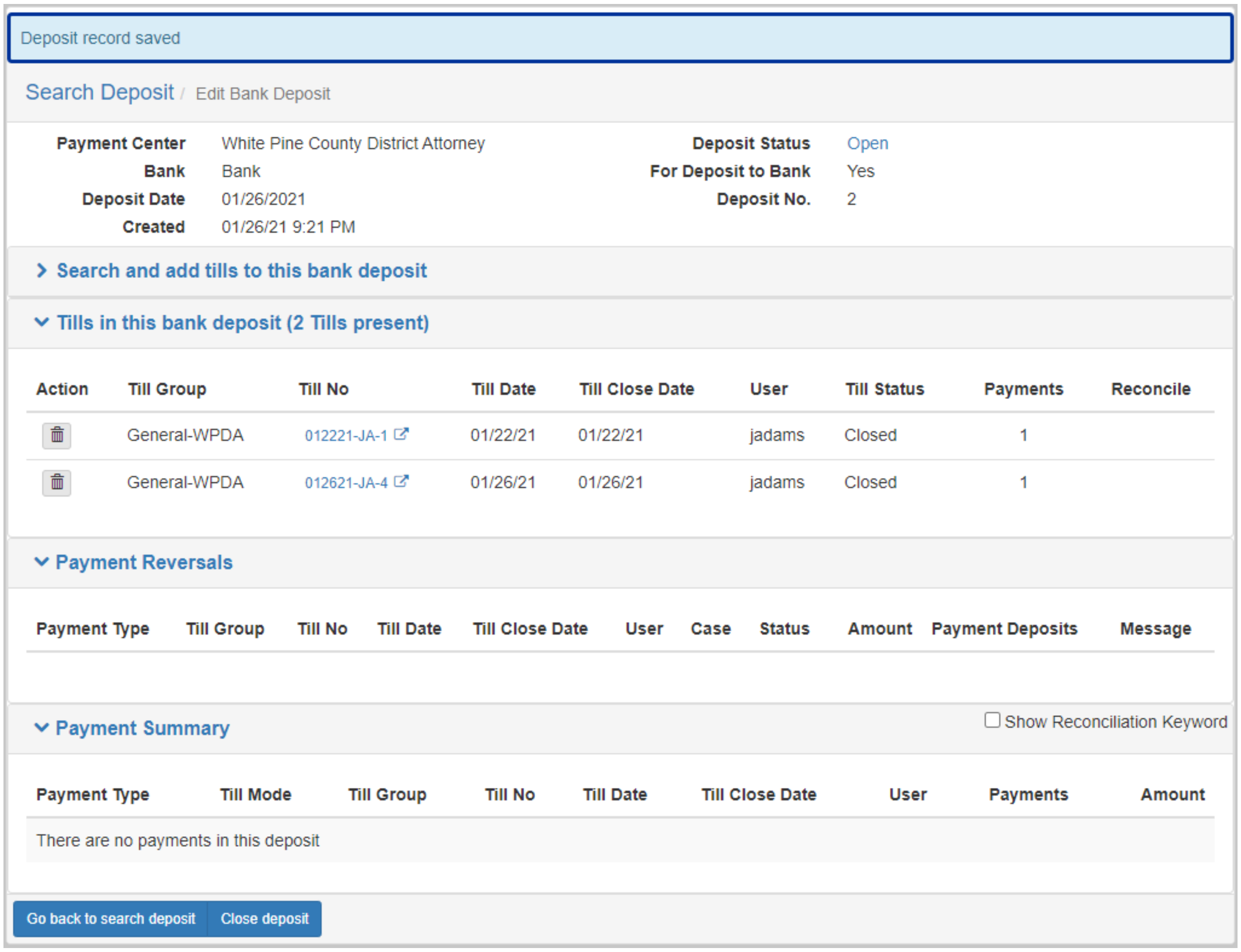
Option 2: create deposit manually

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



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:



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.

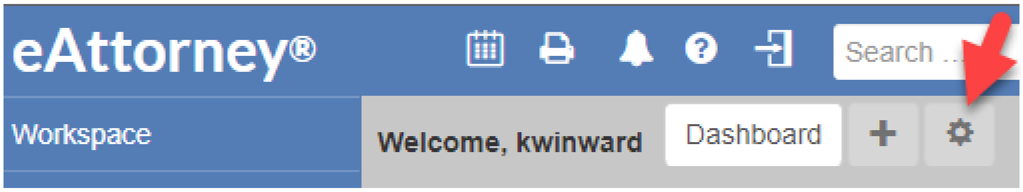
Manage your user password

A user can change their password after logging in.

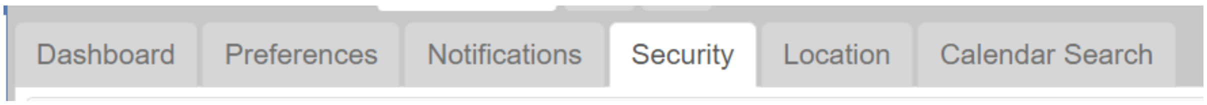
Procedure

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

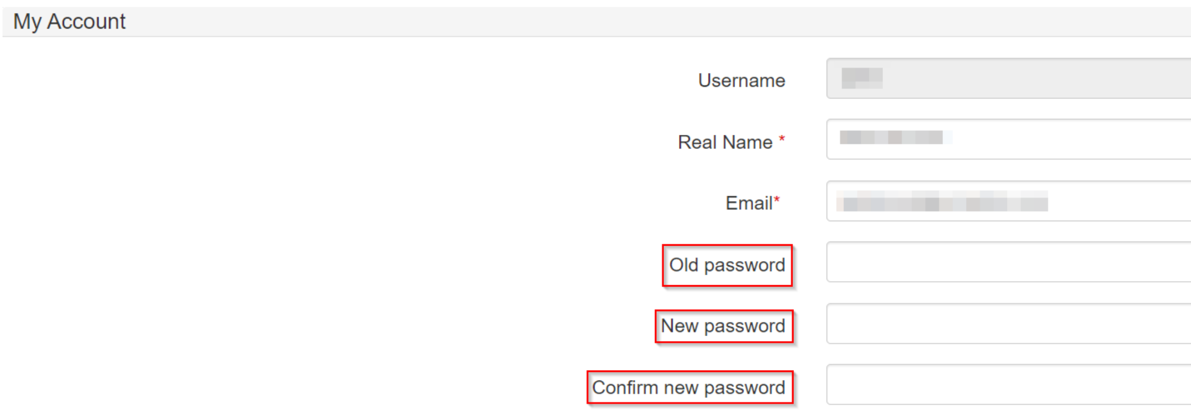
2. Click the **User Settings** icon, to the right of the **Dashboard** tab.



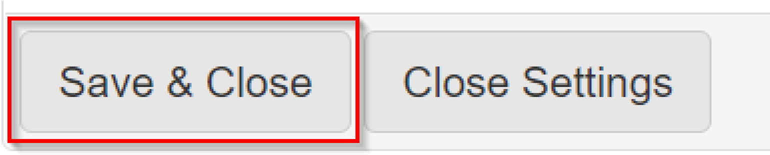
3. Click the **Security** tab on the Dashboard.



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



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

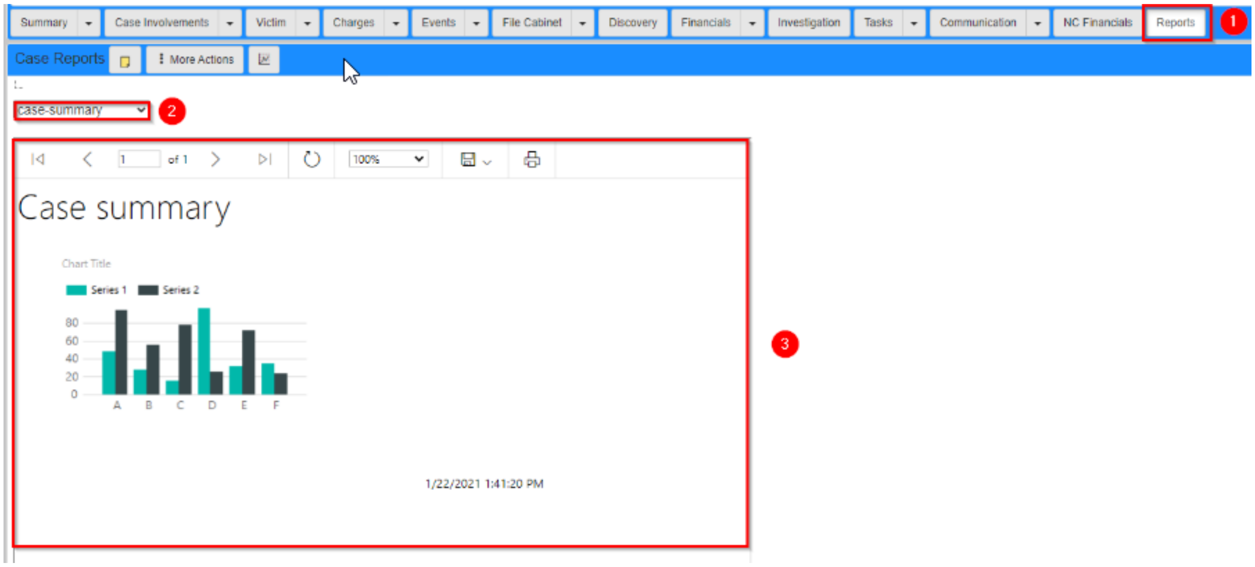


Reports

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 **caseId** 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.

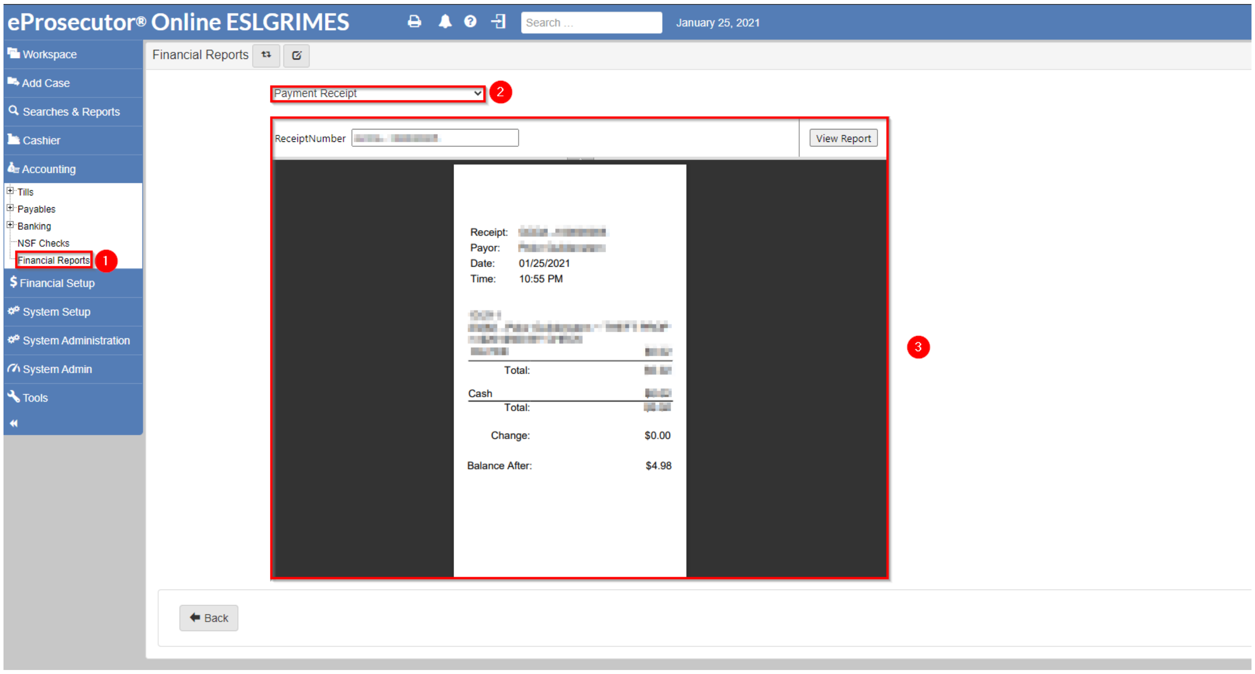
Case involvements

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.

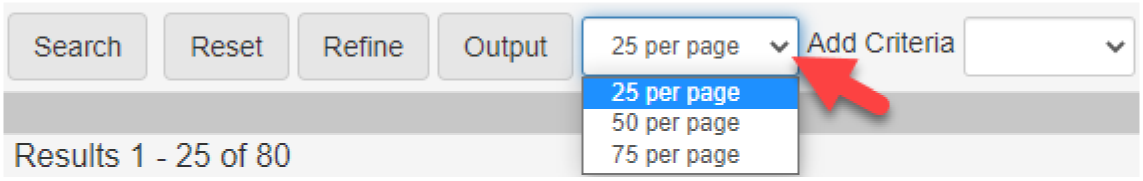
Search controls

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

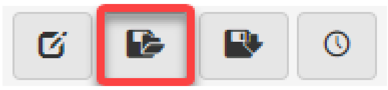
1. Click **[Search]** to execute the search.
2. Click **[Reset]** to reset all parameters and controls to default values.
3. Click **[Refine]** to enable the Refine controls for all parameters.
4. Click **[Output]** to Configure search output. This configuration controls how results are

shown by ordering, hiding, and grouping fields.

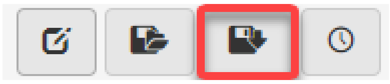
5. Select the results per page.



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

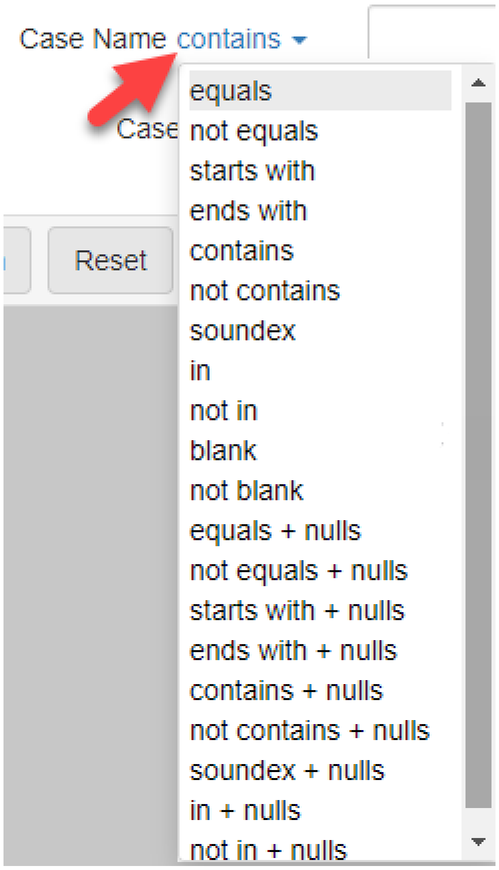


8. Click the **Disk Down Arrow** icon to save the search to your Saved search gadget.



Refine controls

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

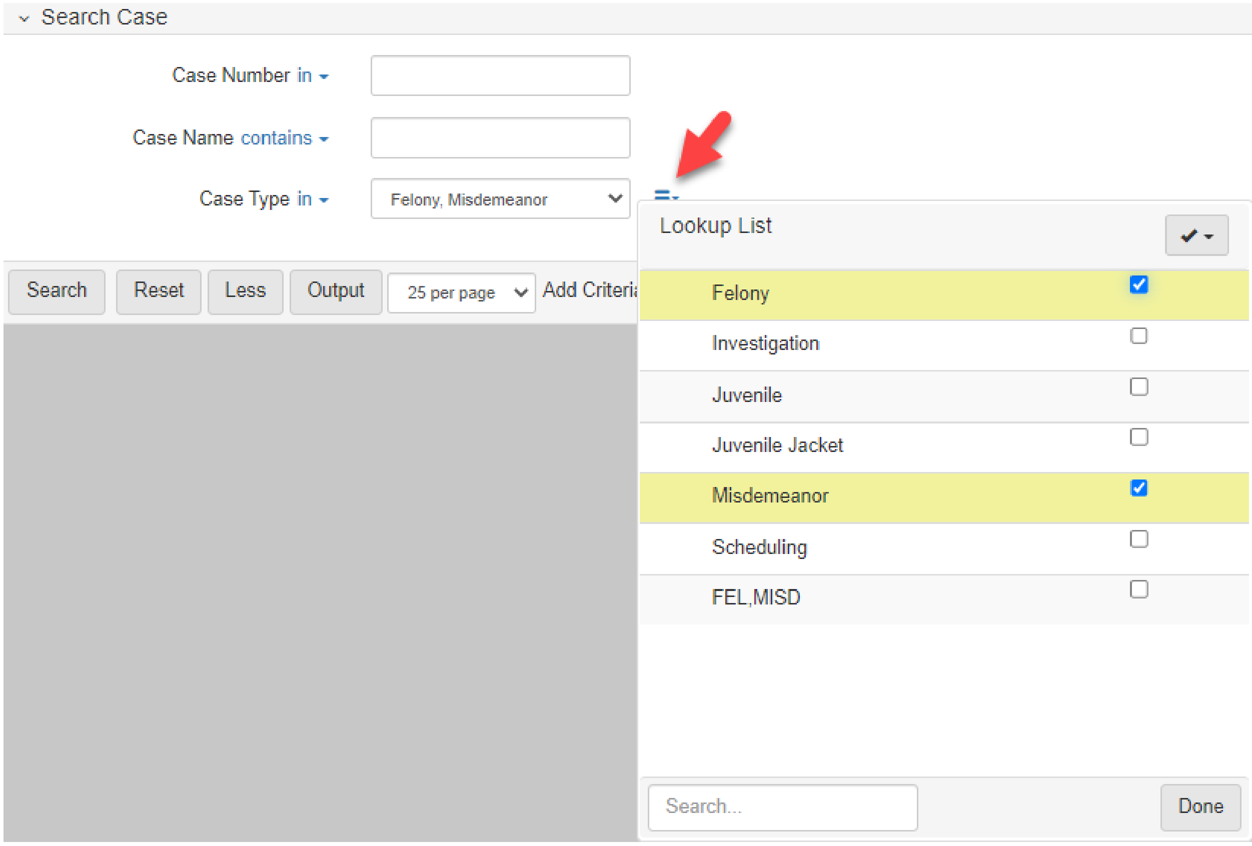


Comparison type	Affect on column
`not equals`	Results do not equal this exact value.
`starts with`	Results start with this exact value.
`ends with`	Results end with this exact value.
`contains`	Results have this exact value.
`not contains`	Results do not have this exact value.
`soundex`	Results 'sound 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.

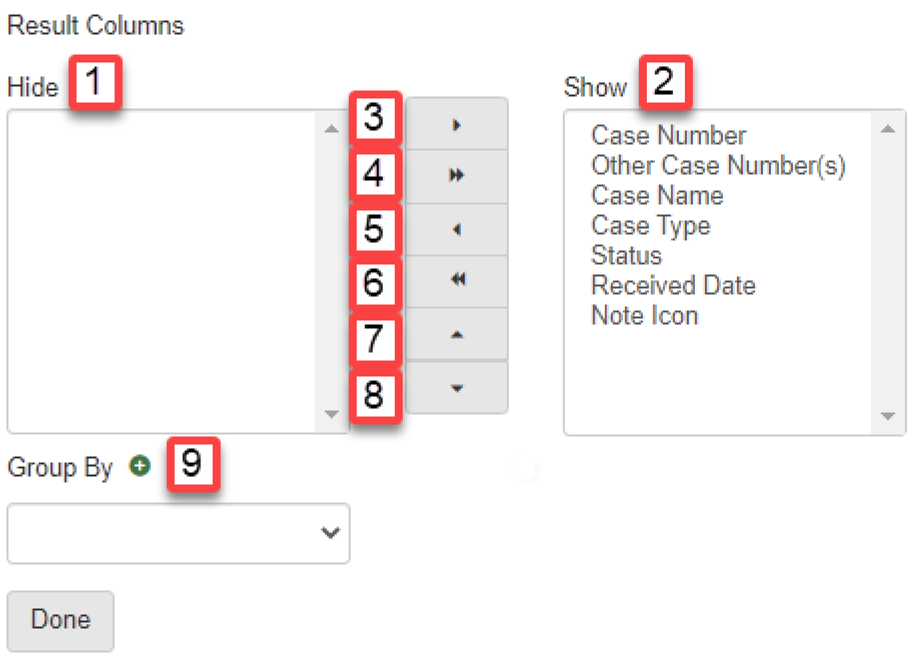
Example of in and not-in comparison types

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.



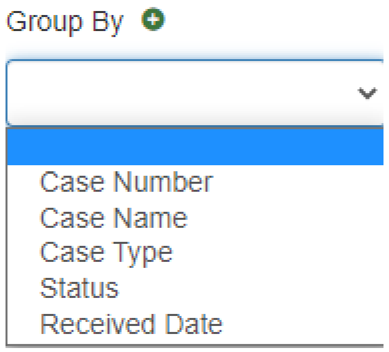
Configure search output

Click **[Output]** to show the **Result Columns** dialog:



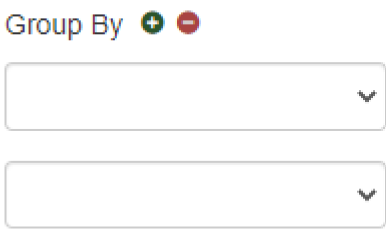
You can configure the search result output with the following:

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.



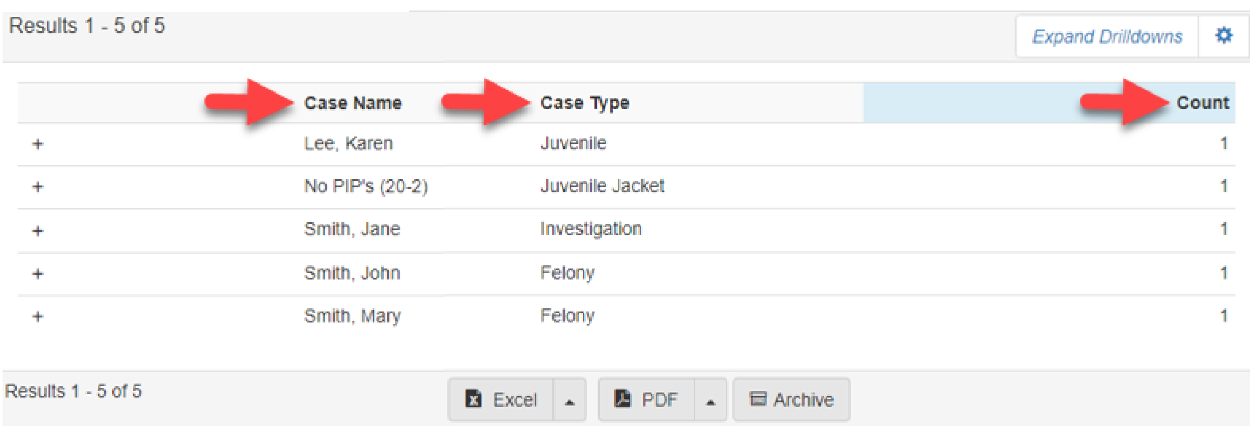
Select the desired parameter to group your results by in the dropdown.

Click the green **[+]** to add more groupings. When shown, click the red **[-]** to remove a grouping.



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

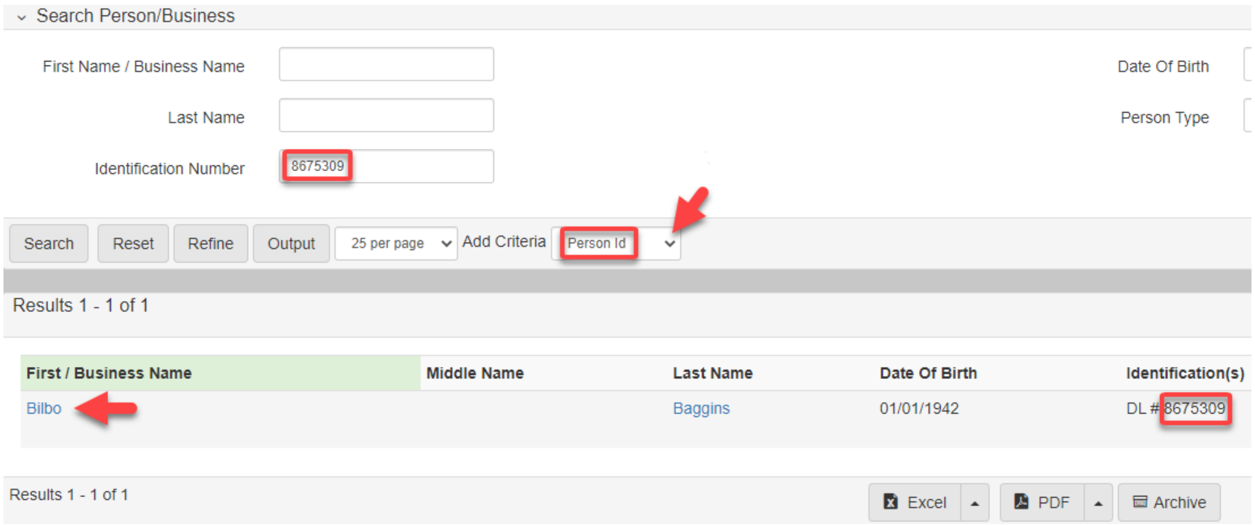
Results 1 - 5 of 5 | Excel | PDF | Archive

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.

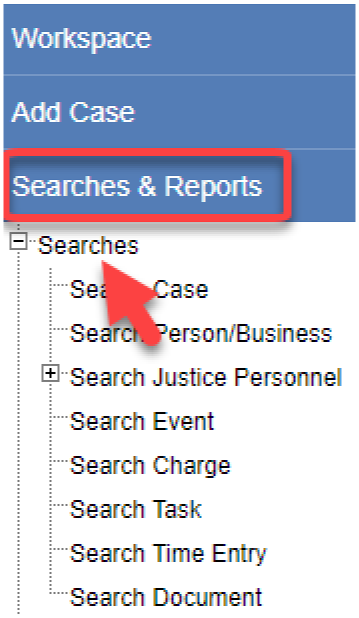


When the search executes, there is only one result because each **Person Id** is unique.

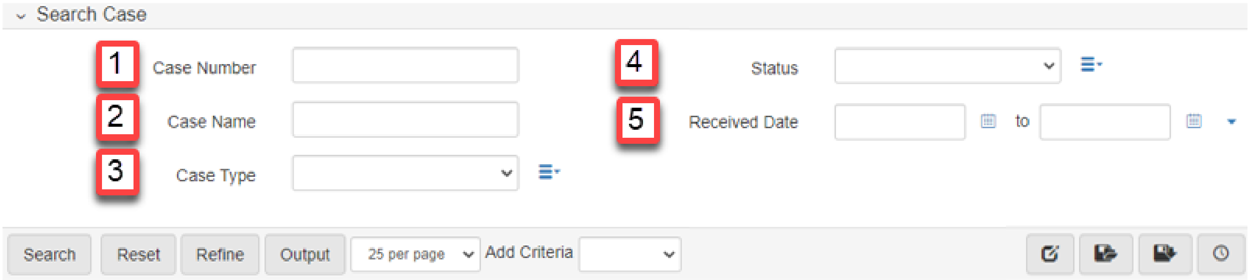
Search case

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



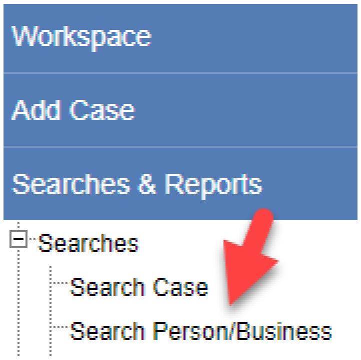
1. **Case Number** - (Free Text) Search for case by Case Number.
2. **Case Name** - (Free Text) Search for case by Case Name.
3. **Case Type** - Limit results to selected Case types.
4. **Case Id** - (Free Text) Search for case records by Case Id. This is a special field added using Add Criteria. For 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.

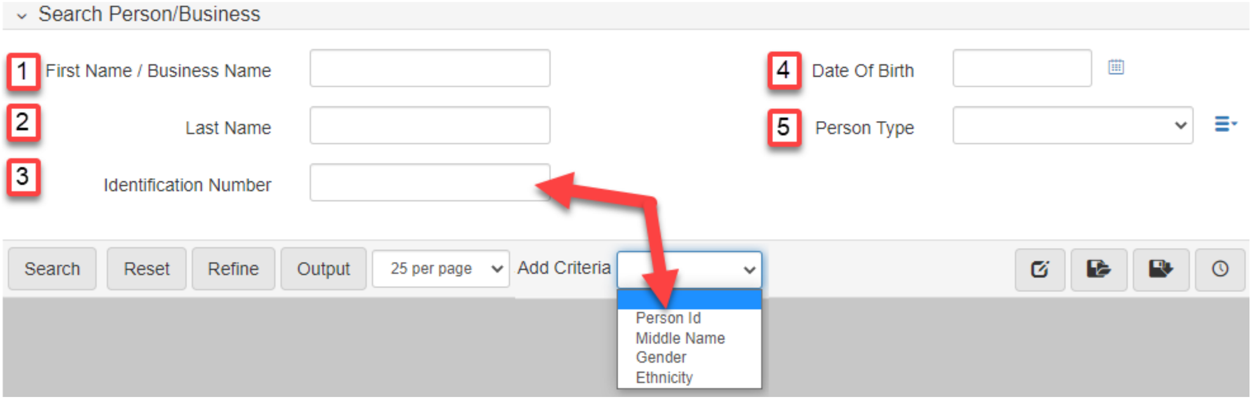
Search person/business

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



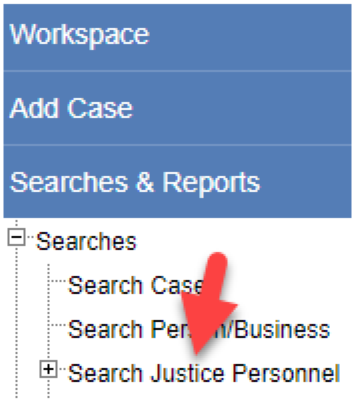
1. **First Name / Business Name** - (Free Text) Search for name by First/Business Name.
2. **Name Type** - Limit results to selected Name Types.
3. **Identification Type** - Limit results to selected Identification Types.
4. **Person Id** - (Free Text) Search for name records by Person Id. This is a 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.

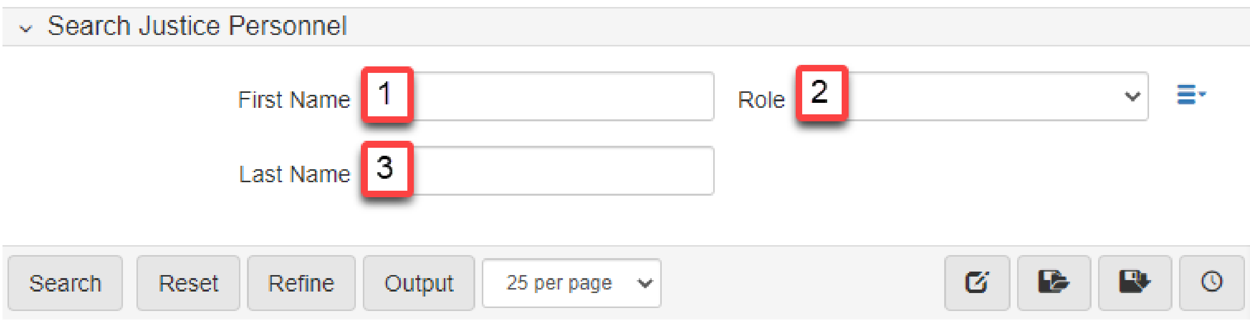
Search justice personnel

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



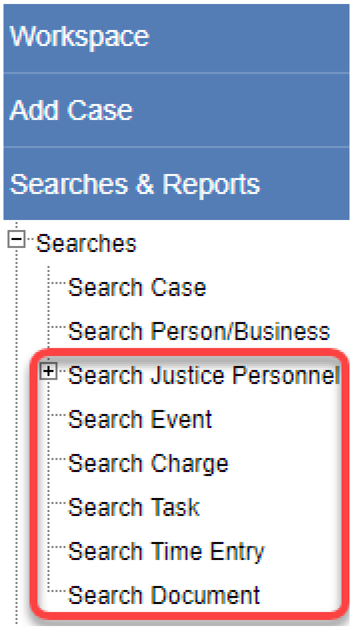
1. **Role** - Limit results to selected Role Types.
2. **First Name** - (Free Text) Search for justice personnel by First Name.
3. **Last Name** - (Free Text) Search for justice personnel by Last Name.

If you would like to change how parameters are being matched, see https://documentation.journaltech.com/eAttorney/user/searches/controls.html.

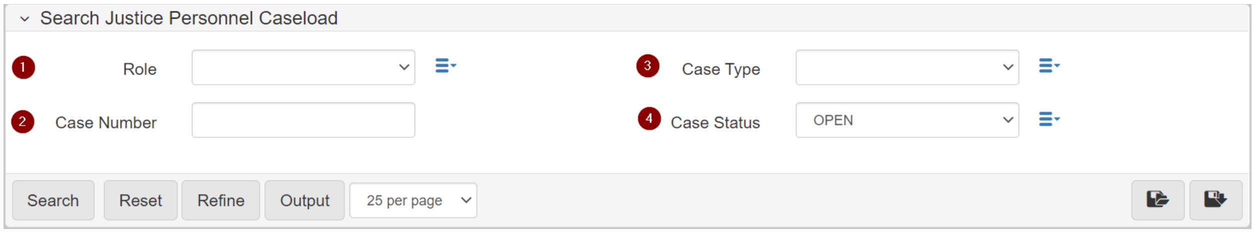
Search justice personnel caseload

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]**.



Parameters



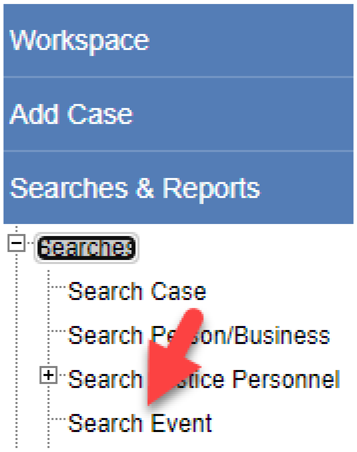
1. **Role** - Limit results to selected Role Types.
2. **Case Number** - (Free Text) Search for justice personnel cases by Case Number.
3. **Case Type** - Limit results to selected Case Types.
4. **Case Status** - Limit results to selected Case Statuses.

If you would like to change how parameters are being matched, see https://documentation.journaltech.com/eAttorney/user/searches/controls.html.

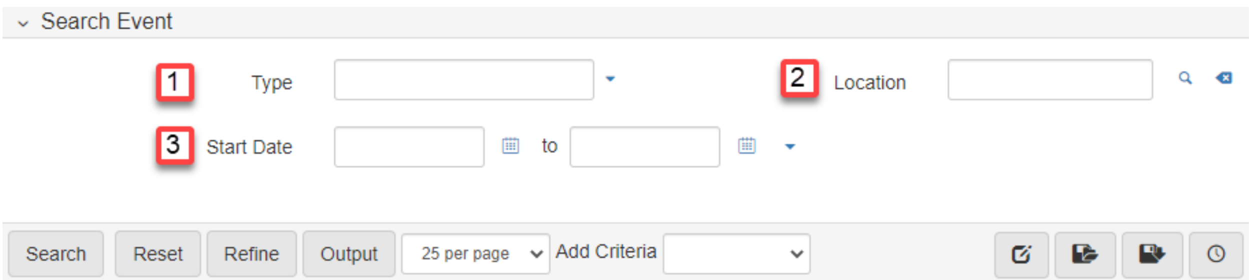
Search scheduled event

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



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.

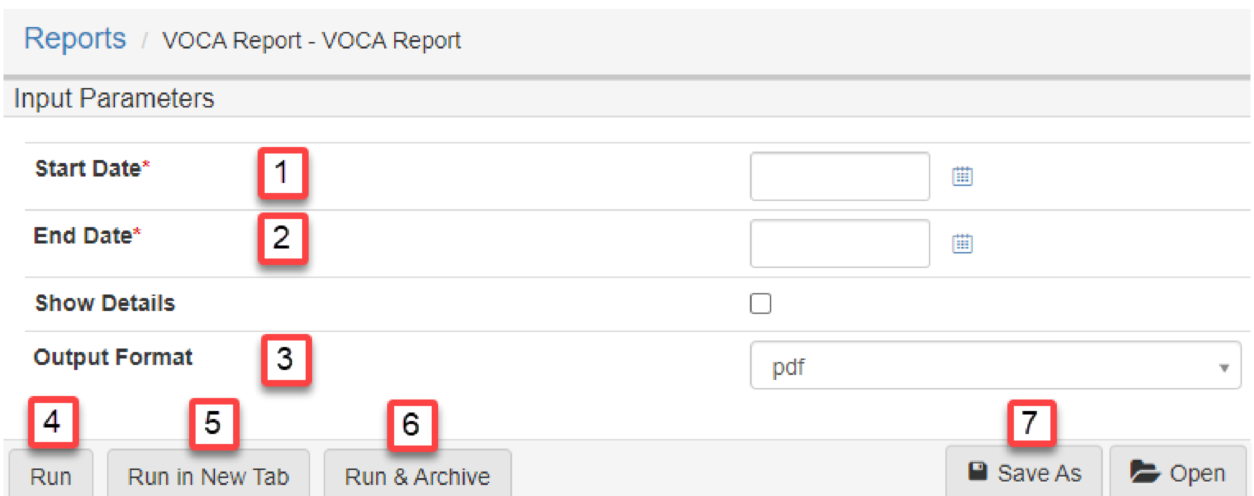
> If you would like to change how parameters are being matched, see https://documentation.journaltech.com/eAttorney/user/searches/controls.html.

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



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.

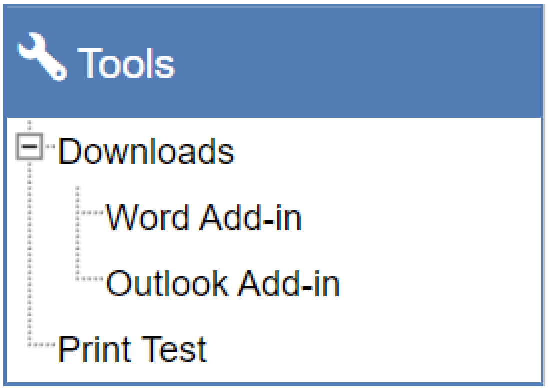
Tools

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

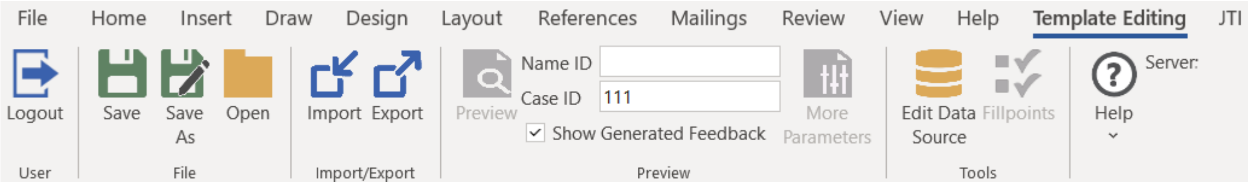
On the left navigation bar at **Tools › Downloads**, you can access the `Word Add-In` and the `Outlook Add-In` executables.



Word add-in

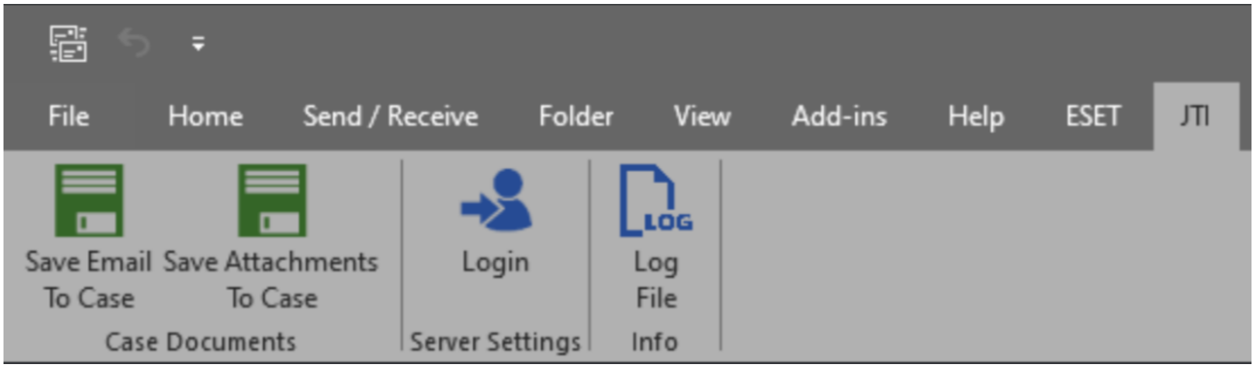
There are three main tasks that the `Word Add-In` is used for:

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.

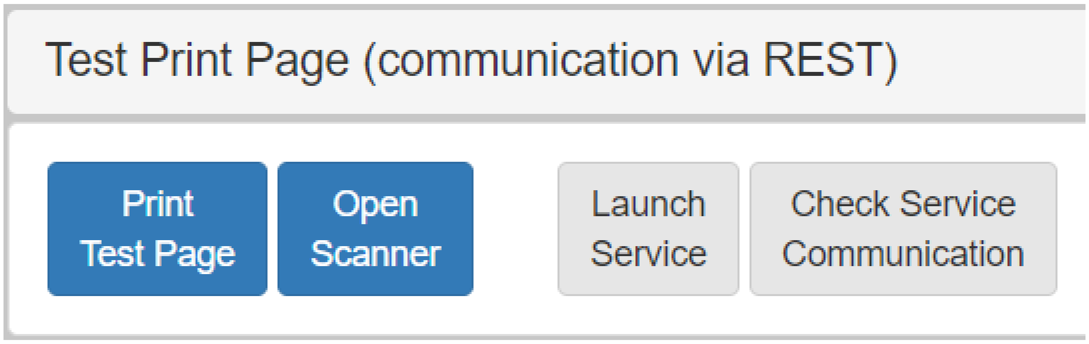


Outlook add-in

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

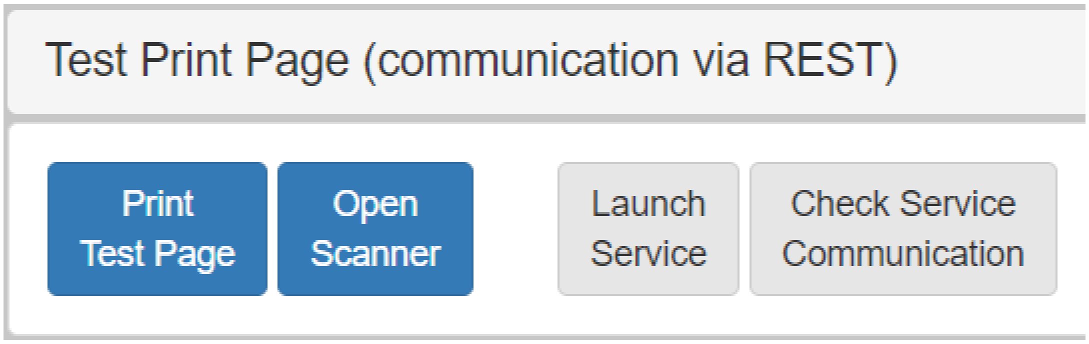
Test the Service by printing a test page.

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:



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.

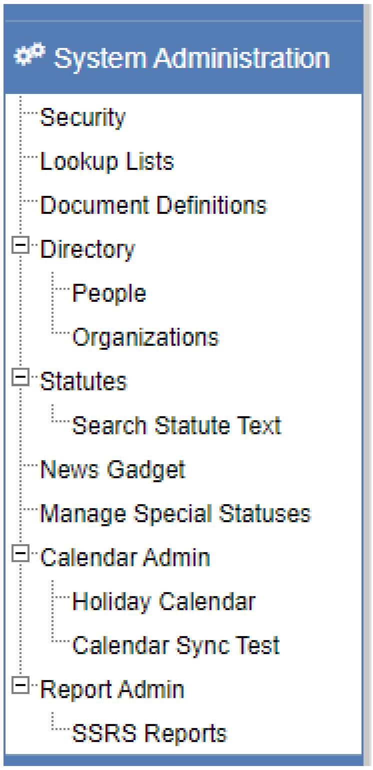
In addition, if the eAttorney server is not a local server but a hosted or remote server, the router/firewall from the remote location must be allowed through.

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

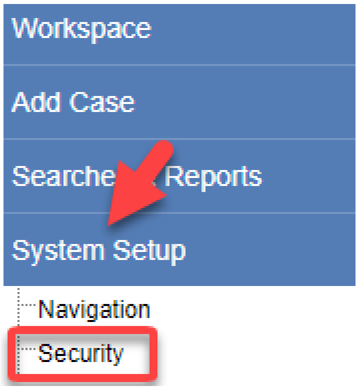
Learn how to manage navigation for users.

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.

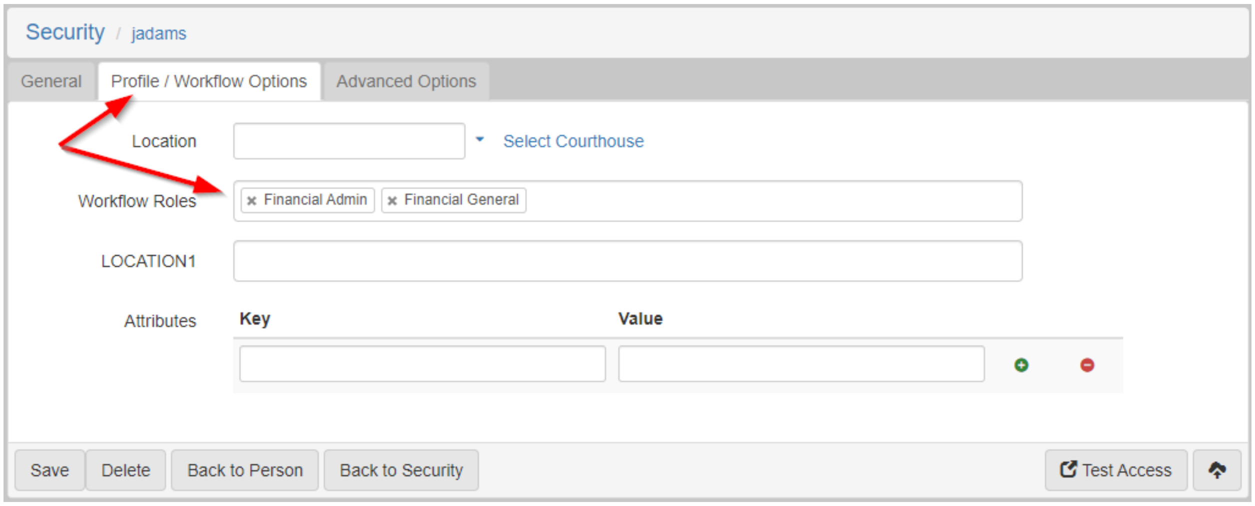
Workflow roles

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]**.



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 the 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 the 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 the 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	✔	✔

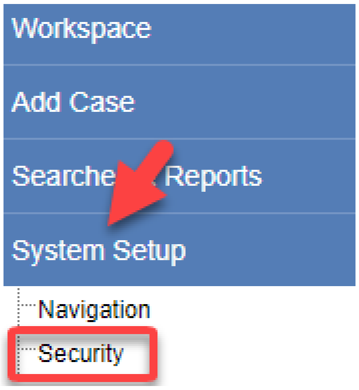
Power_Financial	✓	✓
Power_Seal	✓	✓
Power_Seal_Financial	✓	✓
Super	✓	✓
Super_Financial	✓	✓
Super_Seal	✓	✓
Super_Seal_Financial	✓	✓
ViewOnly	✓	✓

- 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.

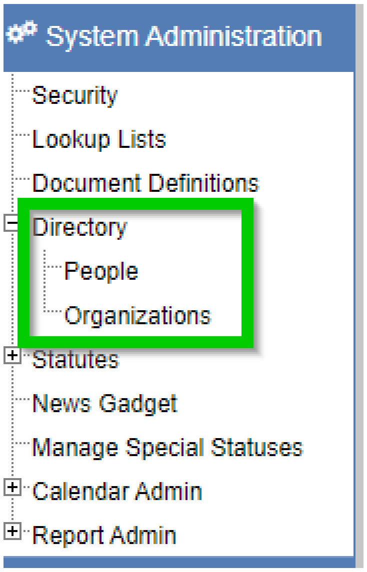
The default security groups and the permissions granted to each:

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] and Organizations [https://documentation.journaltech.com/eAttorney/admin/directory/org_unit.html]. Persons [https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html] and Organizations [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.



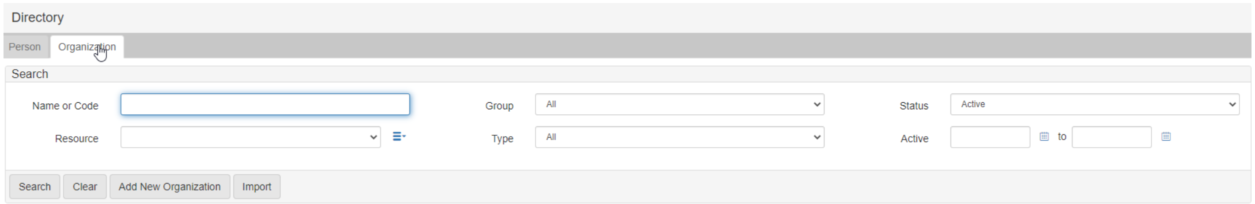
For information on how directory persons are used on cases, and added through the case screen, see Summary.

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



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.

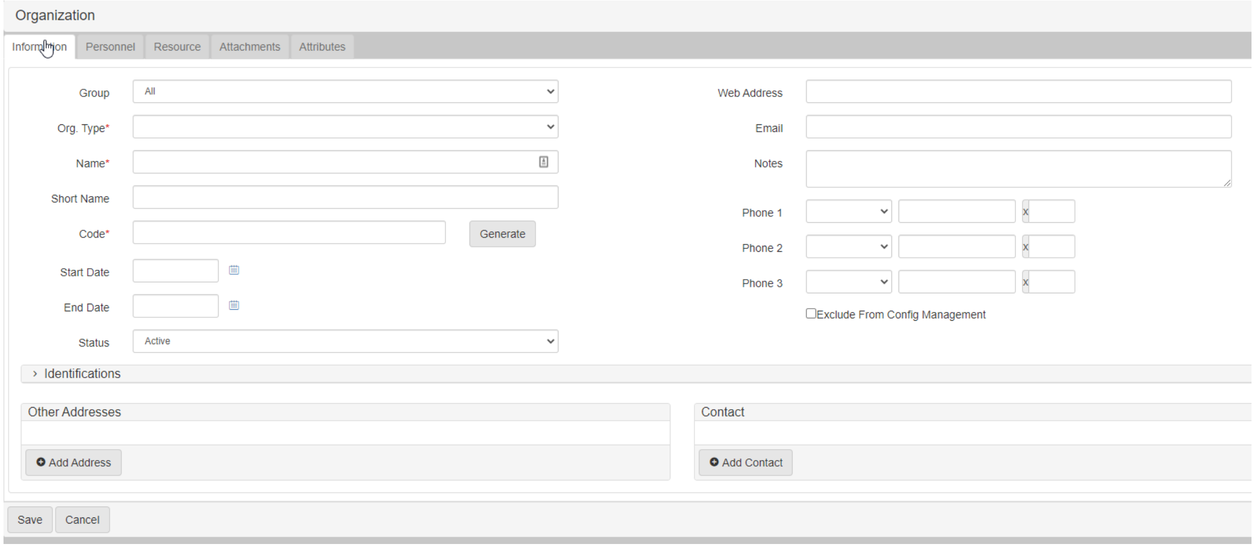
Buttons:

- **[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.

- 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`:

   a. Choose the phone type: `Cell Phone`, `Fax`, `Home Phone`, `Work Phone`

   b. Enter the ten digit phone number.

   c. Optionally enter the extension.

`Org. Type`, `Name`, and `Code` are all required.

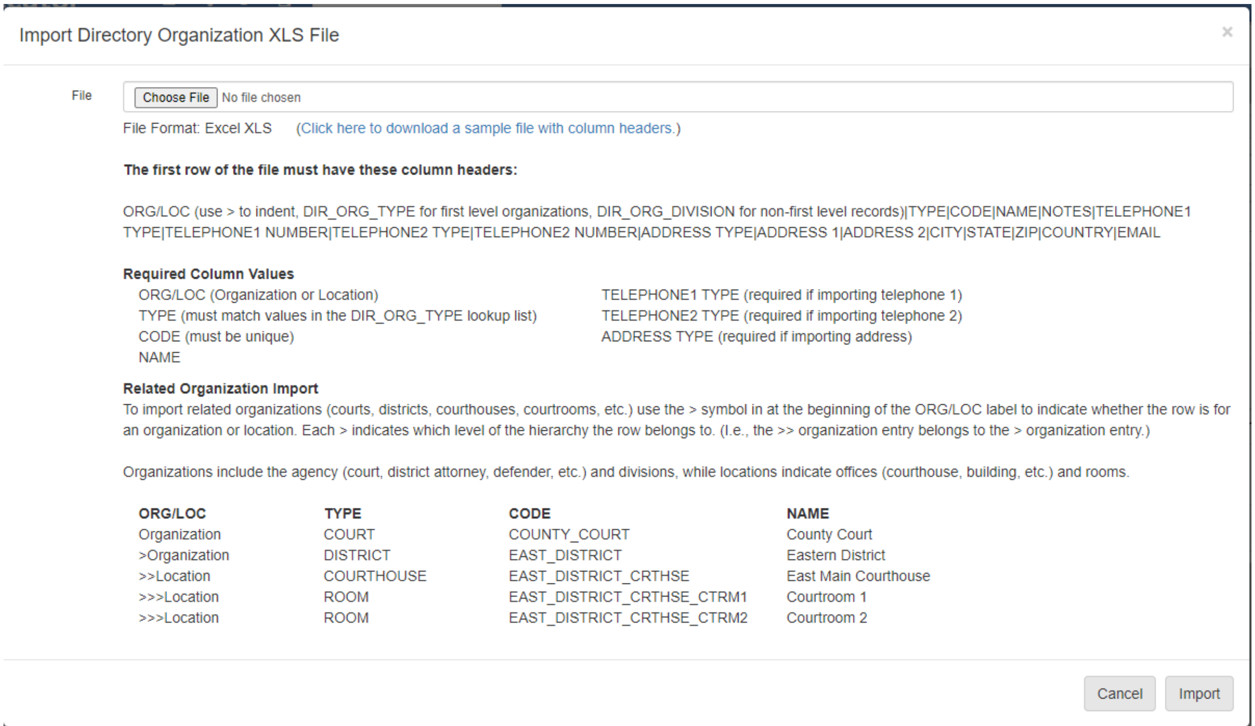
Optional items

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`

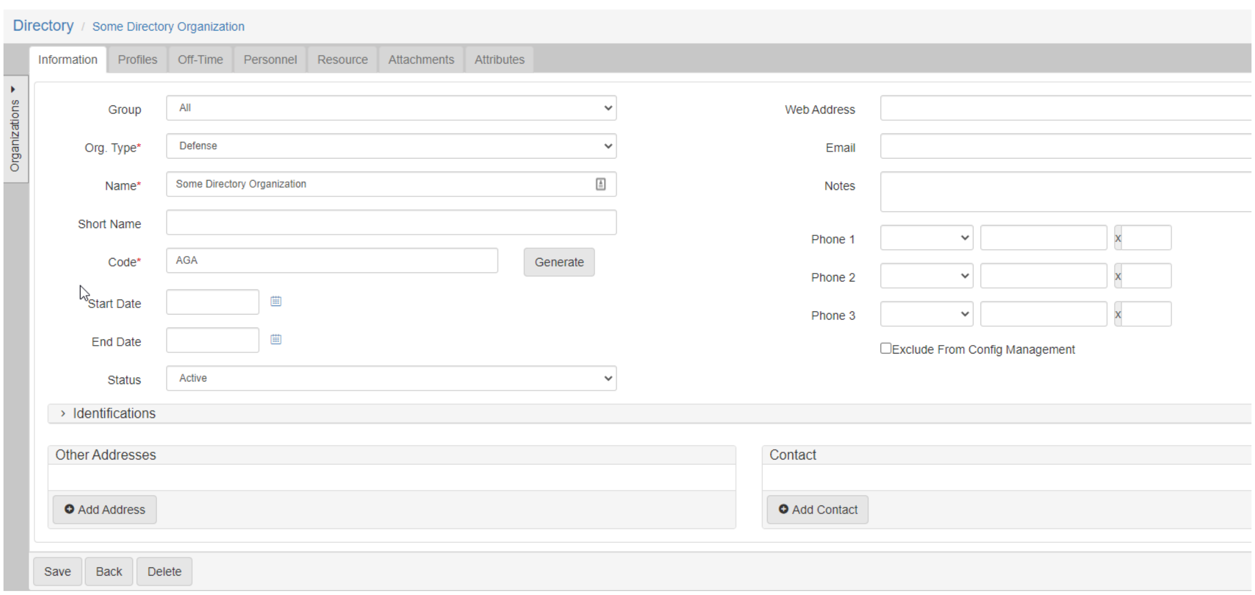
Bulk importing directory organizations

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.



Edit a directory organization

If you click an organization name, the **Update** form is shows:



- `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.

- 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`:

    a. Choose the phone type: `Cell Phone`, `Fax`, `Home Phone`, `Work Phone`
    b. Enter the ten digit phone number.
    c. Optionally enter the extension.

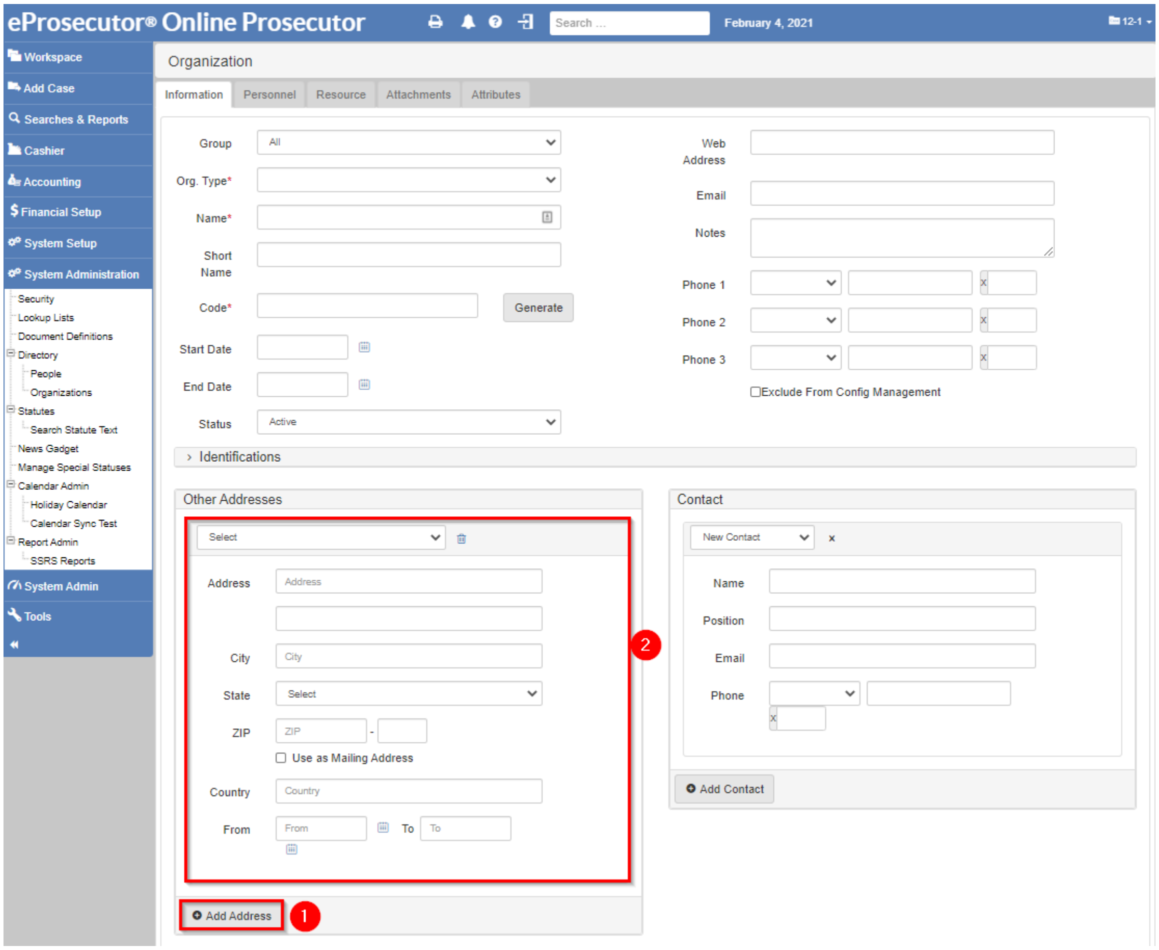
`Org. Type`, `Name`, and `Code` are all required.

Optional items

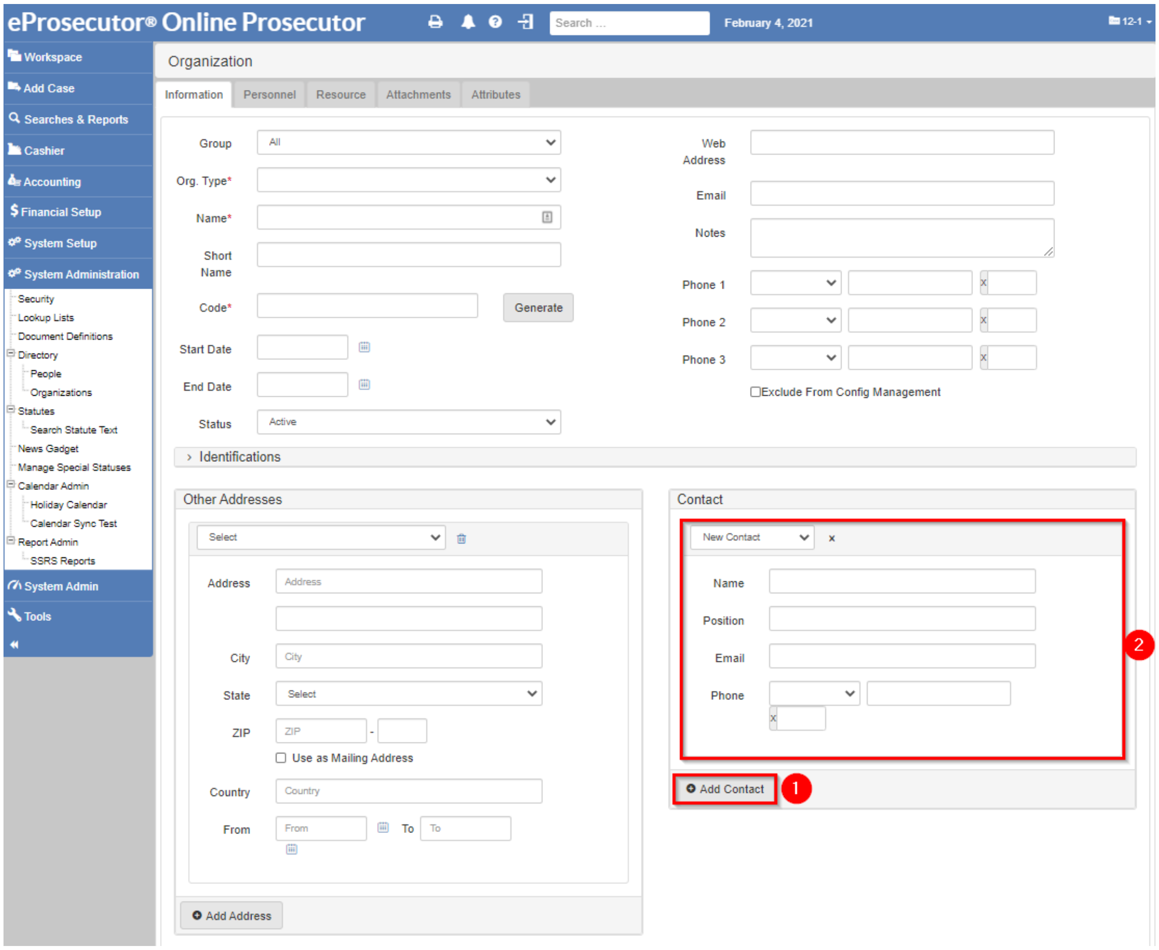
Optionally, you can add:

- https://documentation.journaltech.com/eAttorney/admin/directory/identifications.html for an organization.
- `Address`

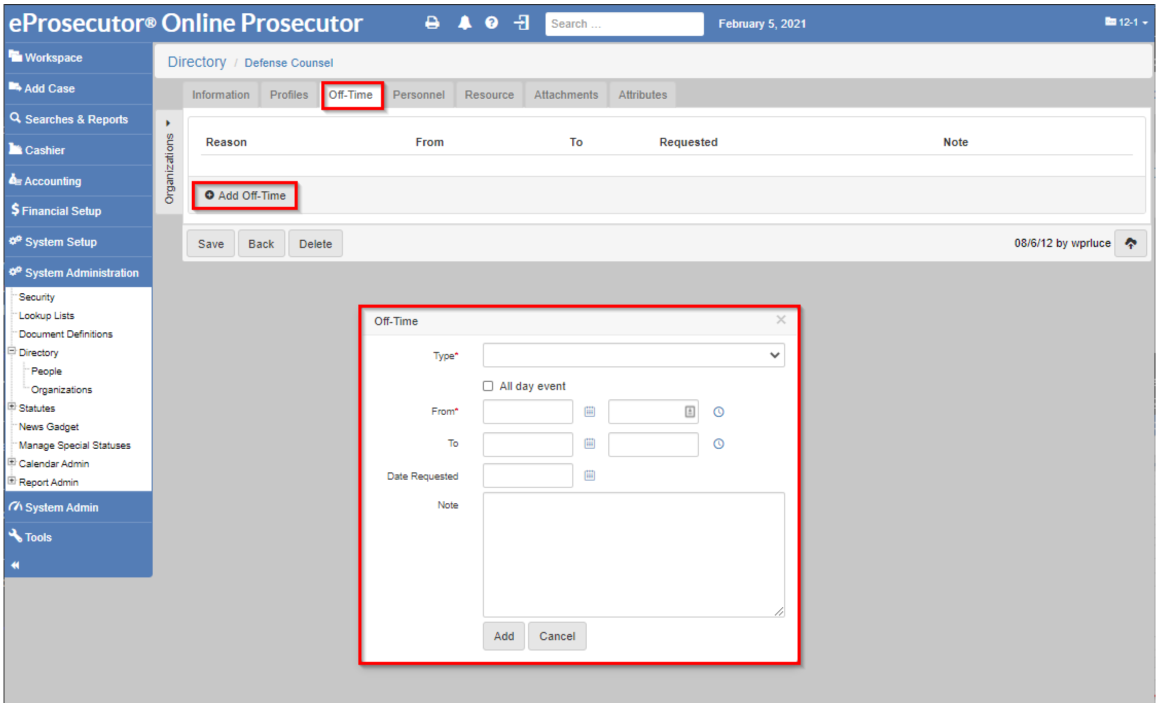
- `Contact`
- `Off-time`
- `Personnel` (Directory Persons [https://documentation.journaltech.com/eAttorney/admin/directory/person/index.html])
- `Resources`
- Attachments [https://documentation.journaltech.com/eAttorney/admin/directory/attachment.html]
- Attributes [https://documentation.journaltech.com/eAttorney/admin/directory/attribute.html]
  - **Addresses** - Addresses can be added by clicking **[Add Address]** (1) and filling out the form that shows (2).



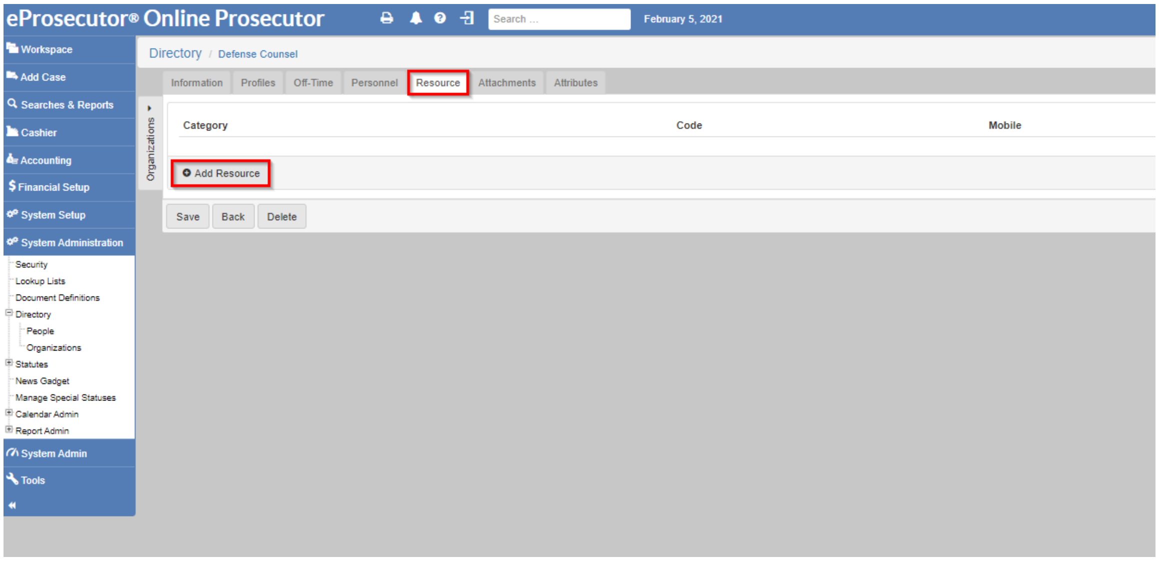
  - **Contact** - Contacts can be added by clicking **[Add Contact]** (1) and filling out the form that shows (2).



- **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).

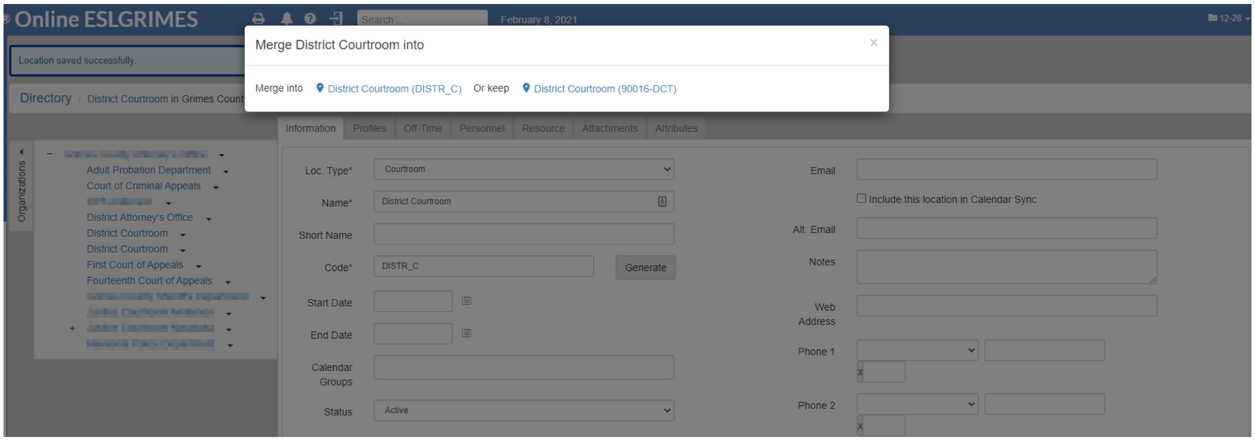
Organization Name (2) → **Move to** (6). Using this feature allows you to mimic the physical structure of an organization or building.

Merge organizations

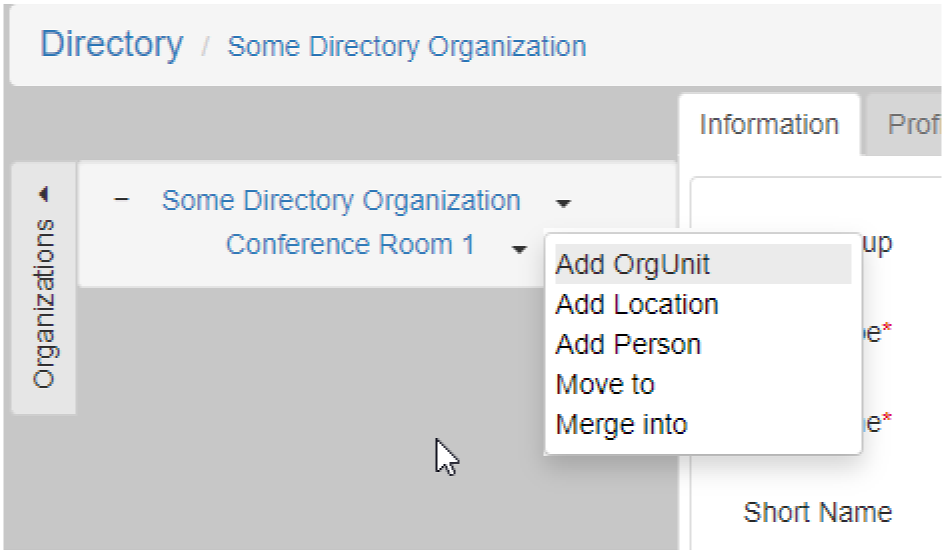
If there are two existing organizations with the same name, a merge operation may be performed to combine the two organizations into one.

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).

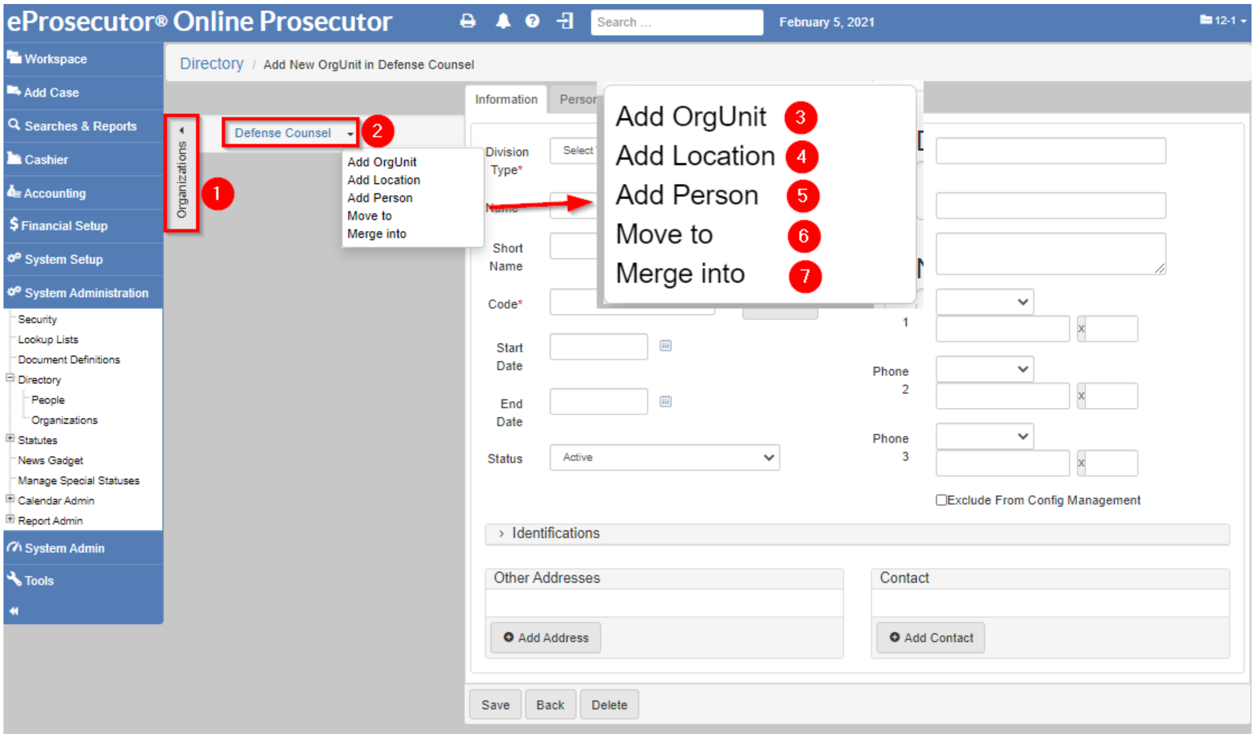
Add a location

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.

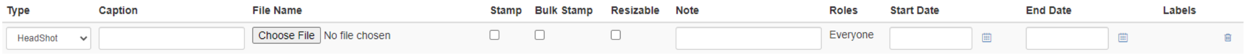


Directory person and directory organization attachment

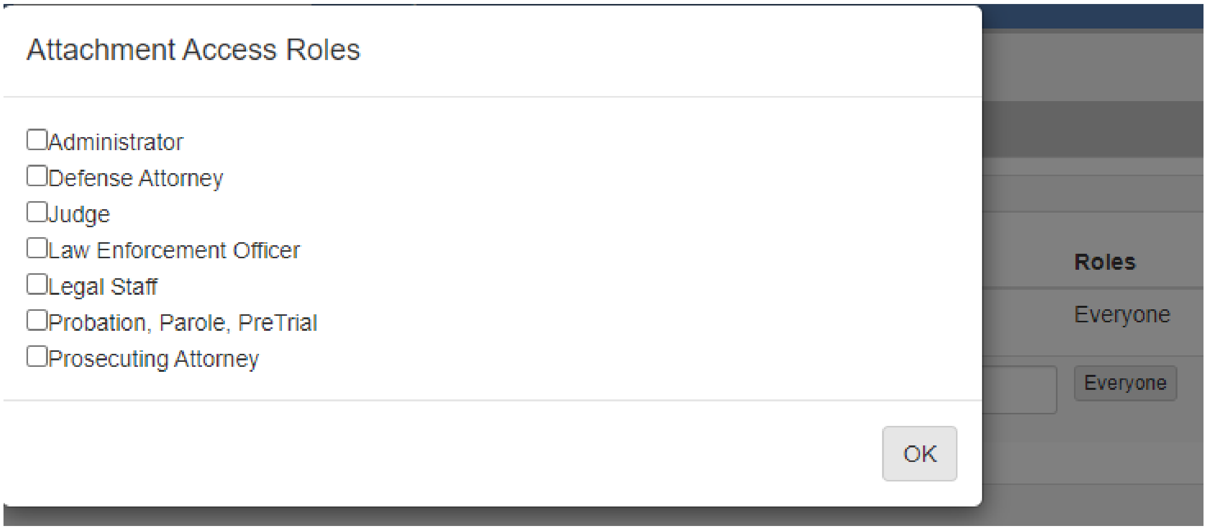
Attachments are documents and images associated with a person or organization. Generally this is used for things like an agency seal or logo, bail bond license, proof of residency, head shot of a person or stamp for document stamping.

Add an attachment

Click **[Add Attachment]** to add a row to add the document in the grid.



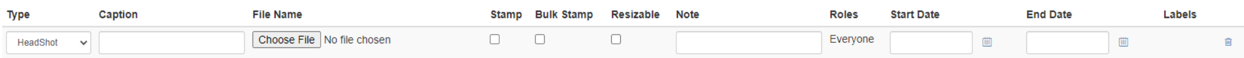
- **Type**: select the attachment type.
- **Caption**: enter a caption for the image.
- **File Name**: click **[Choose File]** to select a file to attach.
- **Stamp**: select to indicate the attachment is a stamp usable by the agency.
- **Bulk Stamp**: select to indicate the attachment is a stamp usable 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**.



- **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]**.

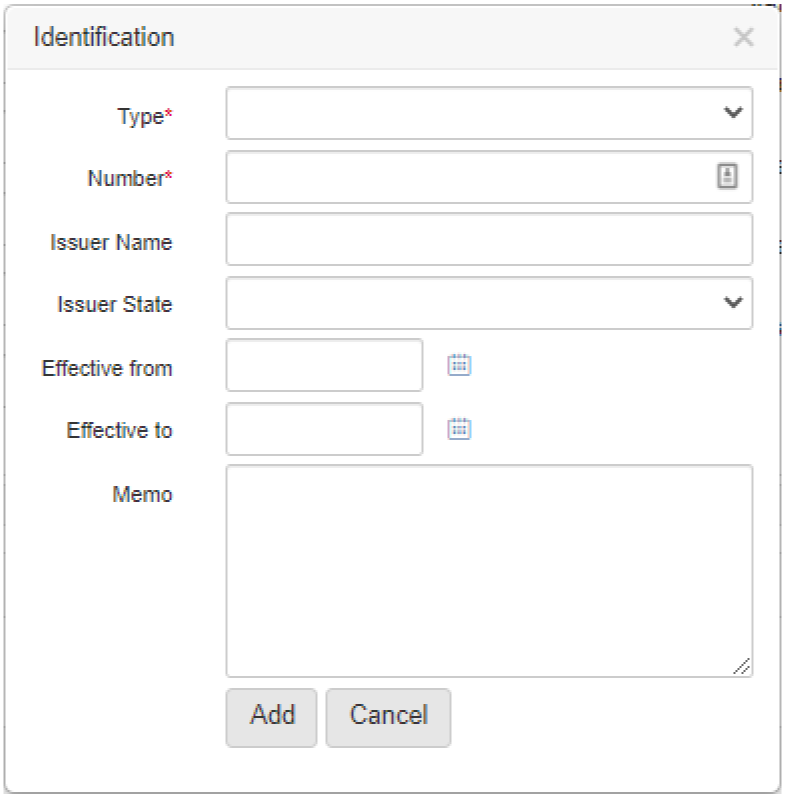


Directory person and directory organization identifications

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:



- **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

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.

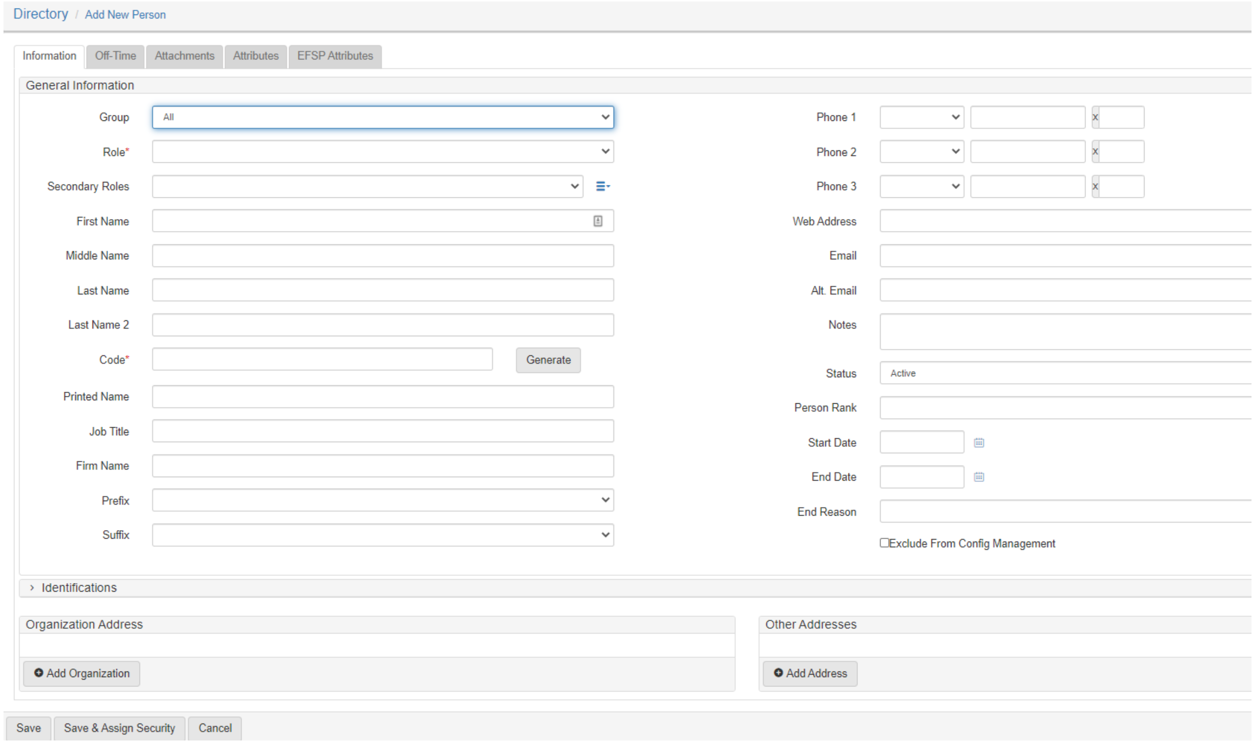
Buttons:

- **[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]**.



- **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.

- **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**:

    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.

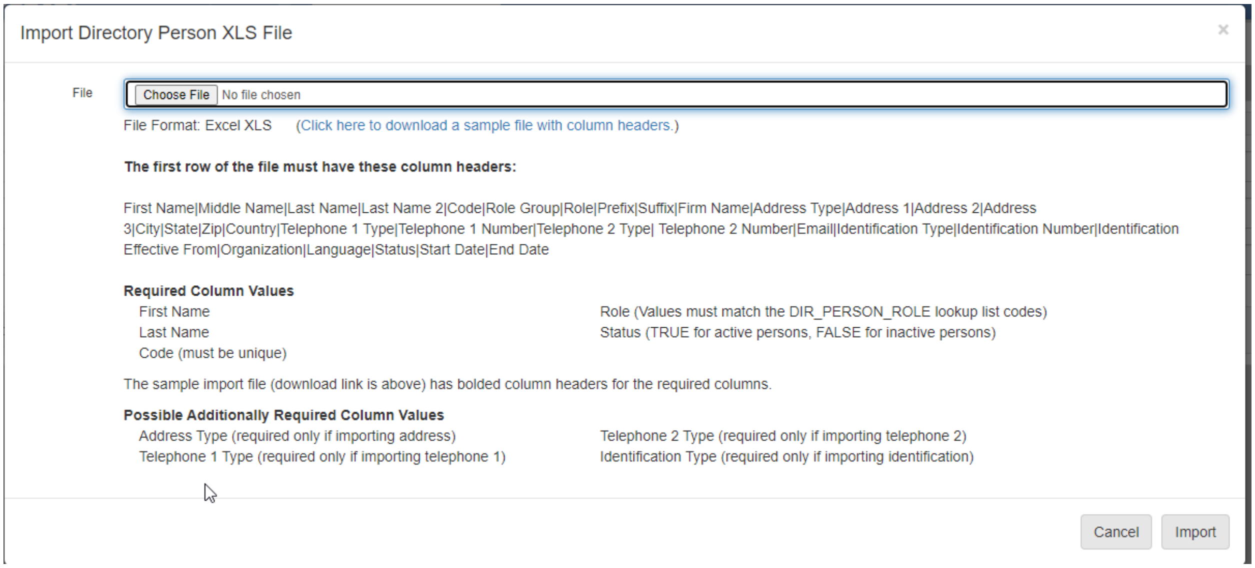
Optional items

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].

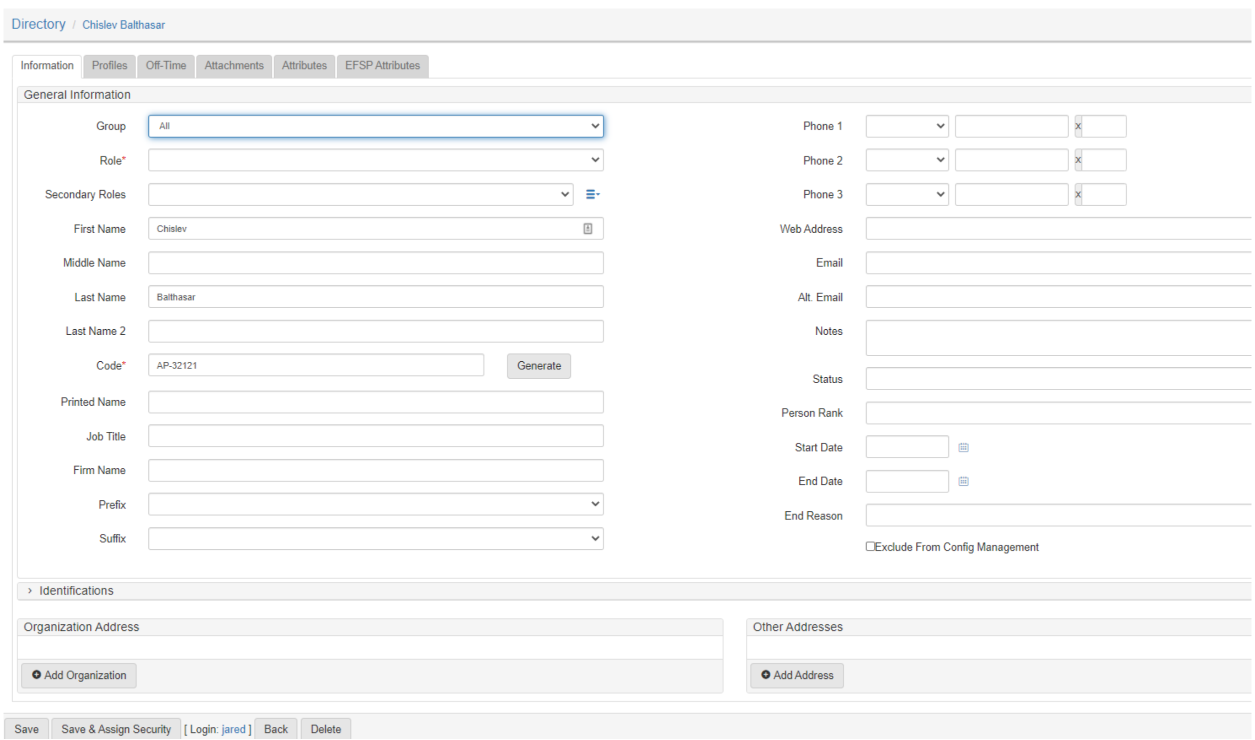
Bulk import directory persons

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.



Edit a directory person

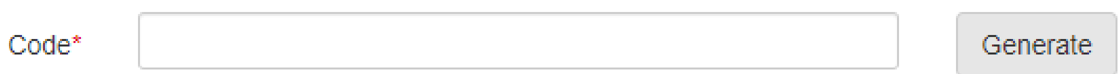
If you click a person name, you are presented with the update form:



- **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.



- **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**:

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

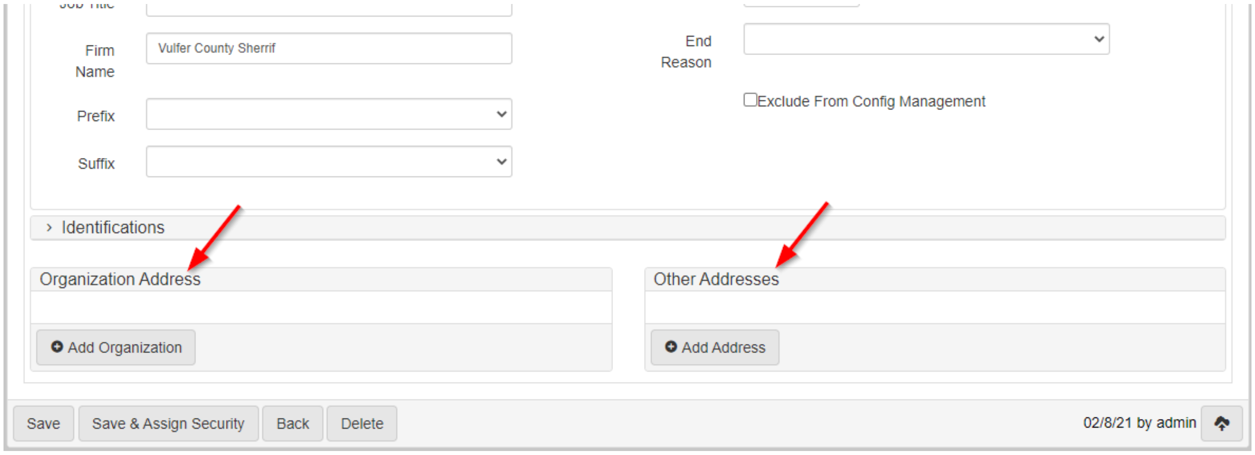
Optionally, you can add the following items to a person record:

- 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/

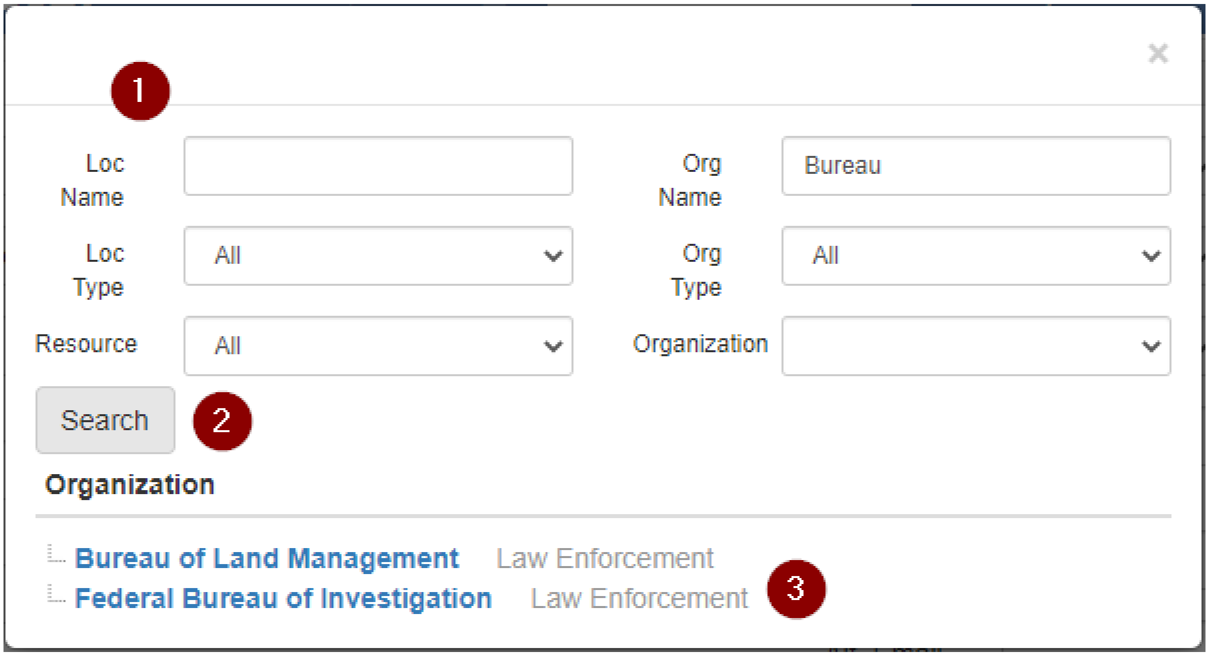
person/index.html screen, addresses can be associated with the person record. An Organization Address or Other Address can be added:



Organization addresses

An Organization Address shows when a Directory Person is added to a Directory organization.

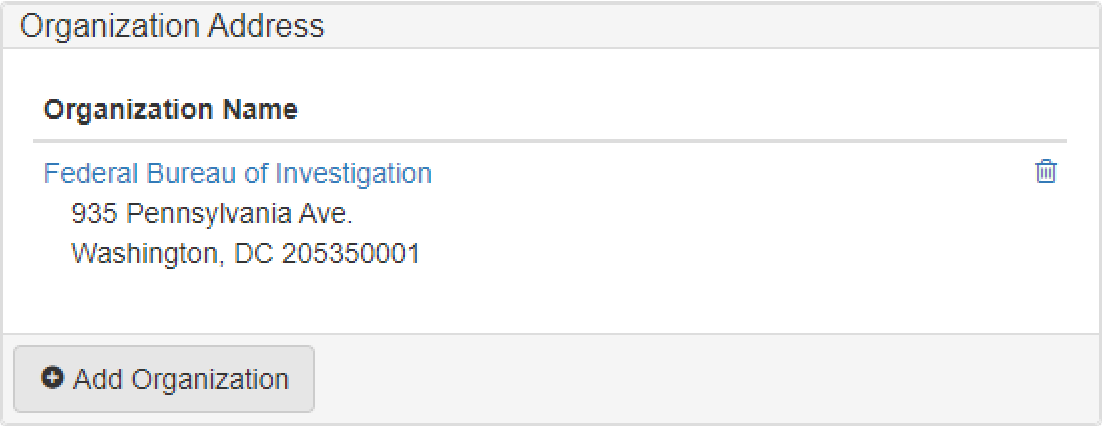
To add a person to an organization, click **[Add Organization]**. This shows the **Organization Search** pop-up:



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:

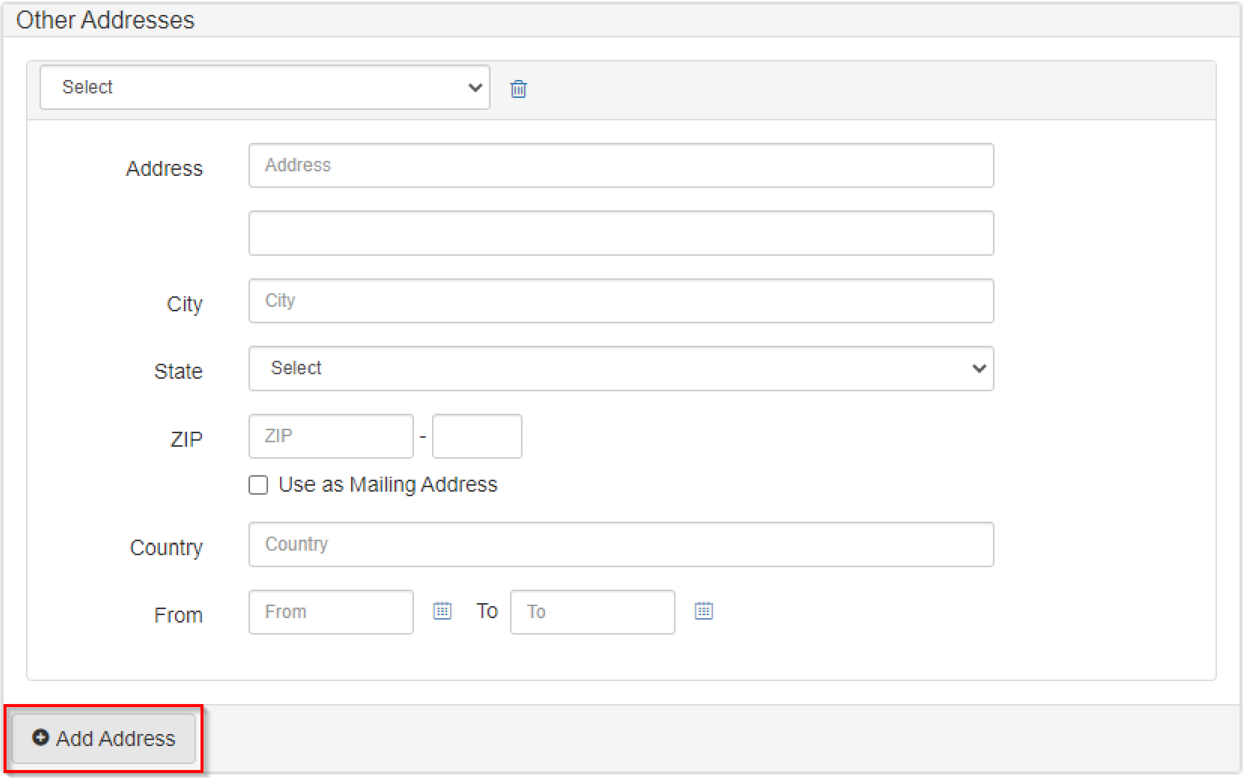


After adding the organization, click **[Save]** on the **Directory Person** record to save the changes.

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.



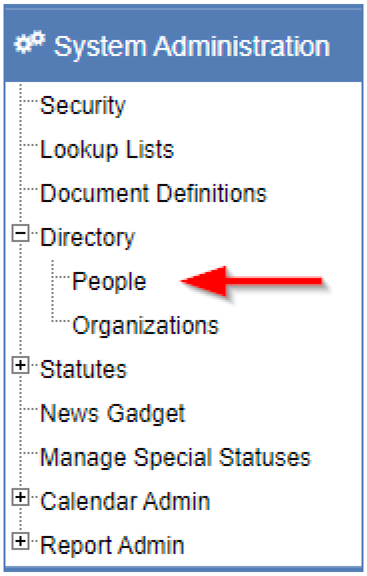
Enter the information for the address, then click **[Save]** on the **Directory Person** record.

Directory off-time

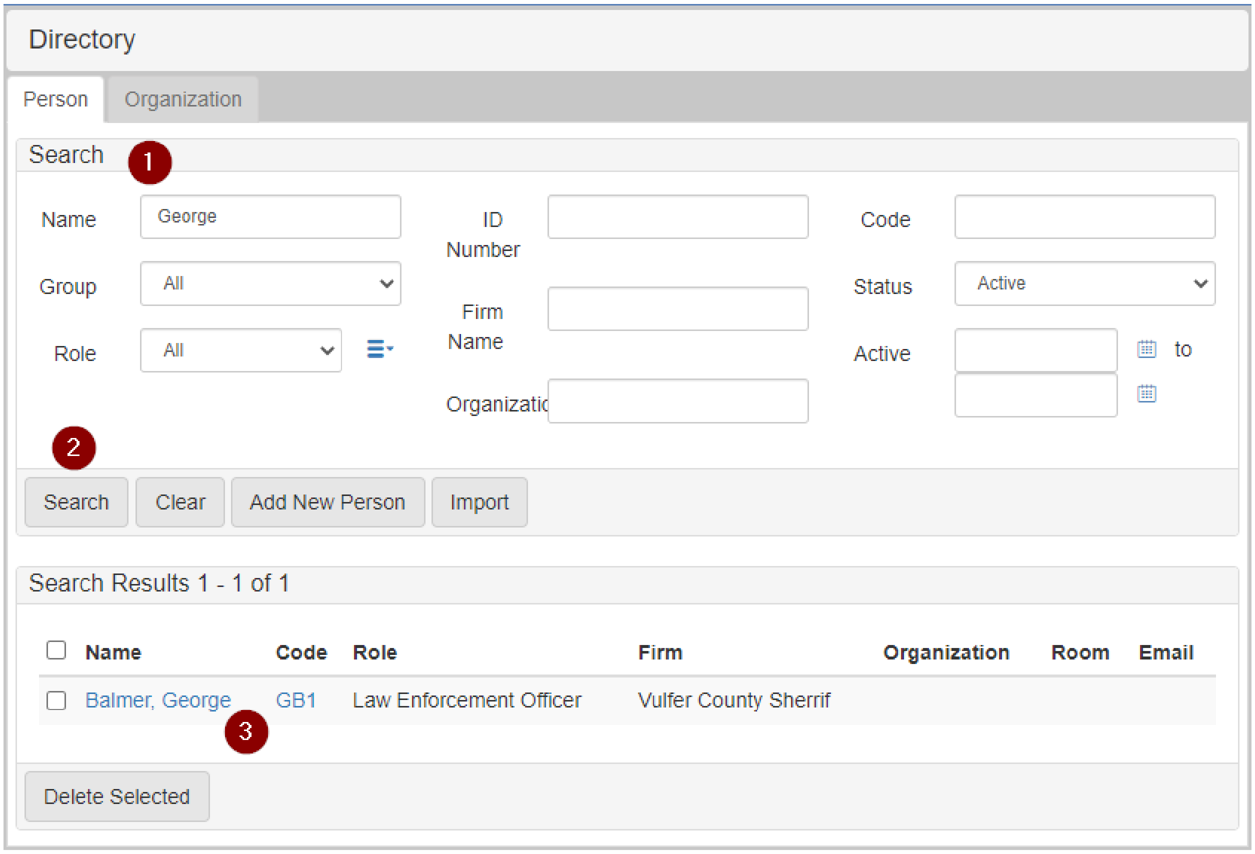
Off-time is a way to track when a Directory Person is off of work. This may include sick leave, schedule vacation, or other reasons.

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:

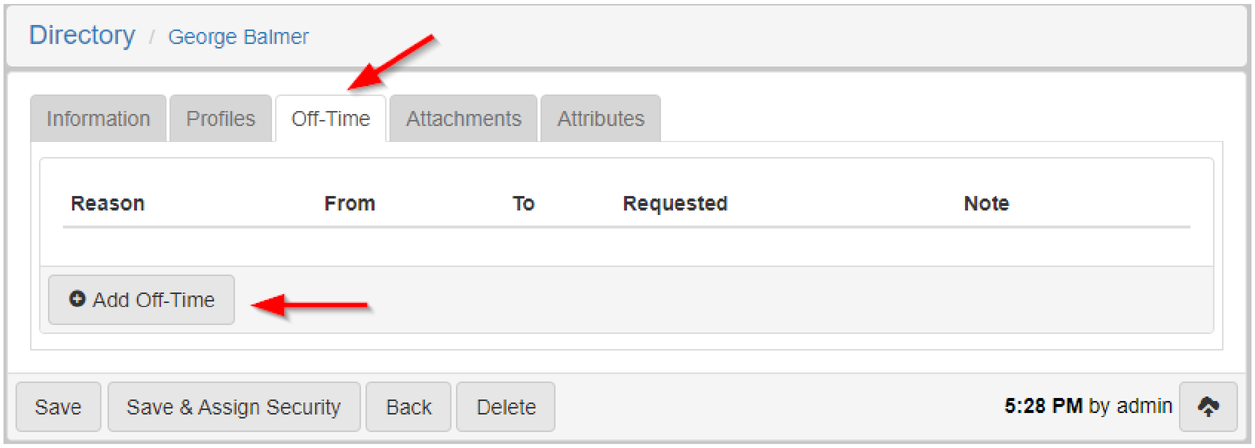


After navigating to the Directory Person search screen, enter the criteria for the individual you are trying to find (1), click the **Search** button (2), and then click the name of the individual:

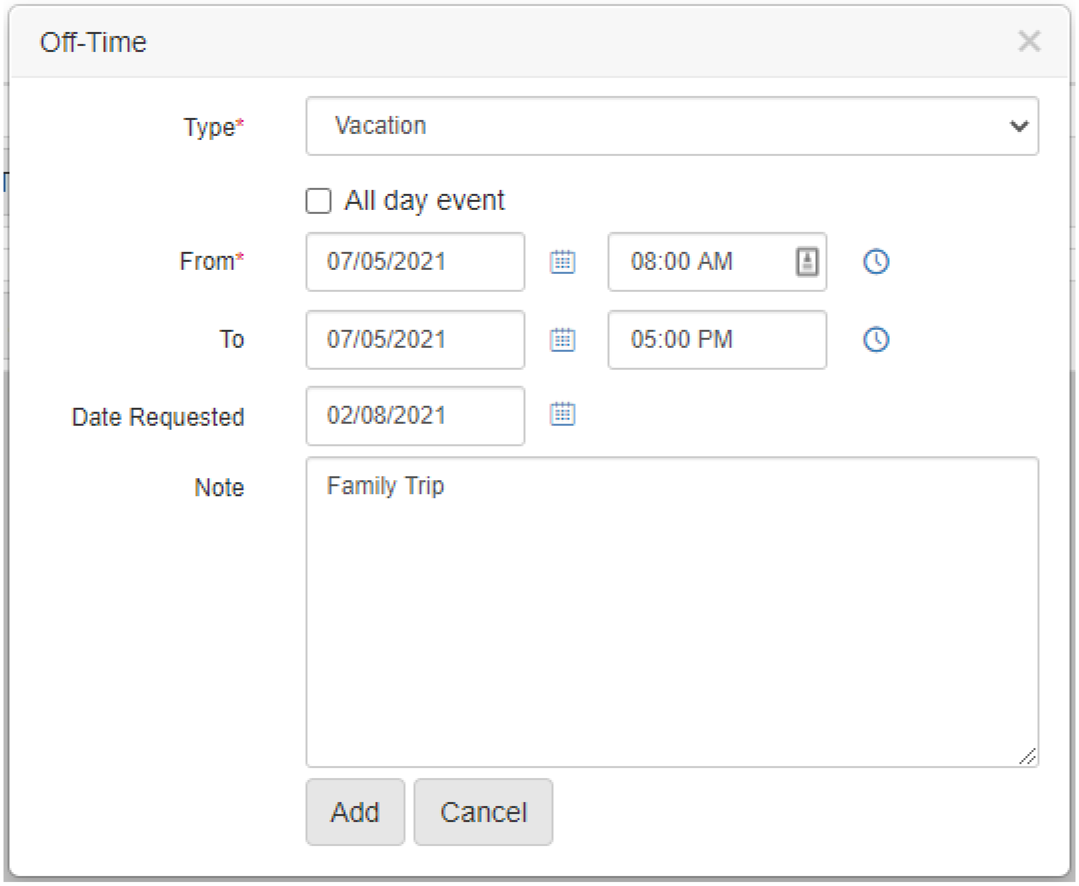


View and add off-time

After clicking a name, the **Directory Person** screen shows. Click the **Off-Time** tab to view and manage off-time for the person:



To add Off-Time for the person, click **[Add Off-Time]**. The following dialog shows:

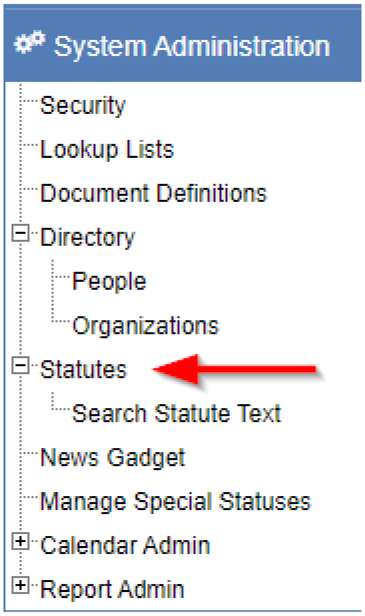


Fill in the information for when the off-time is scheduled and then click **[Add]**. The new entry shows on the Off-Time tab.

Off-Time shows on the calendar for that Directory Person.

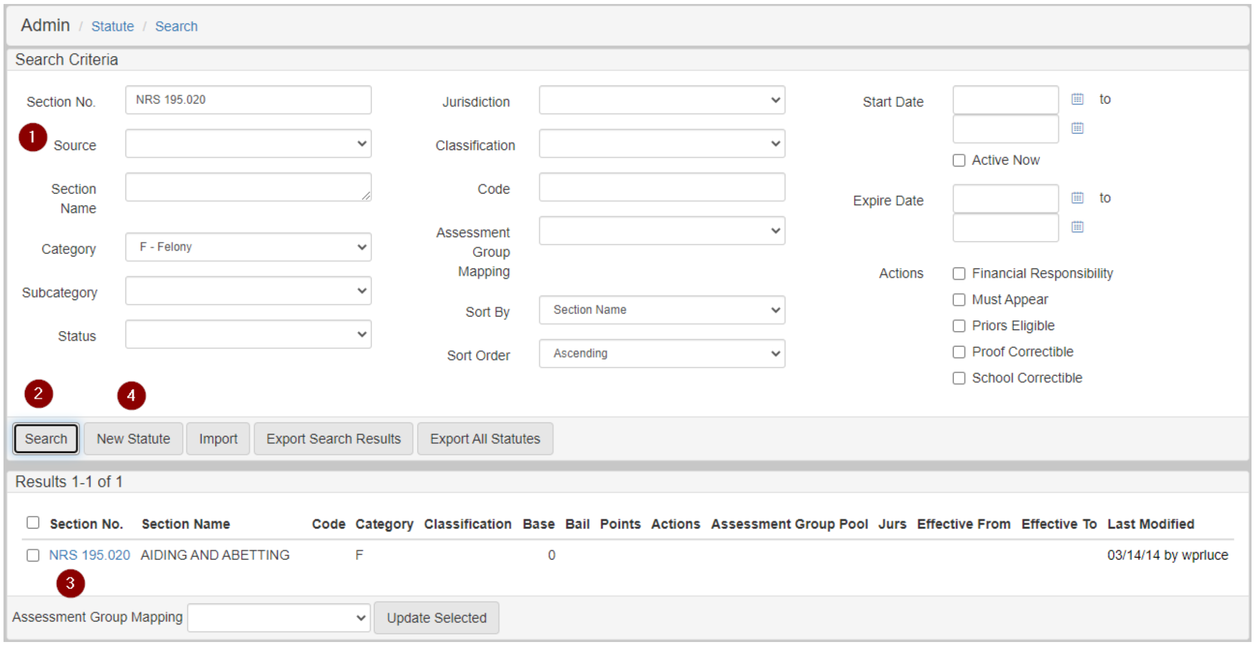
Statutes

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:



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:

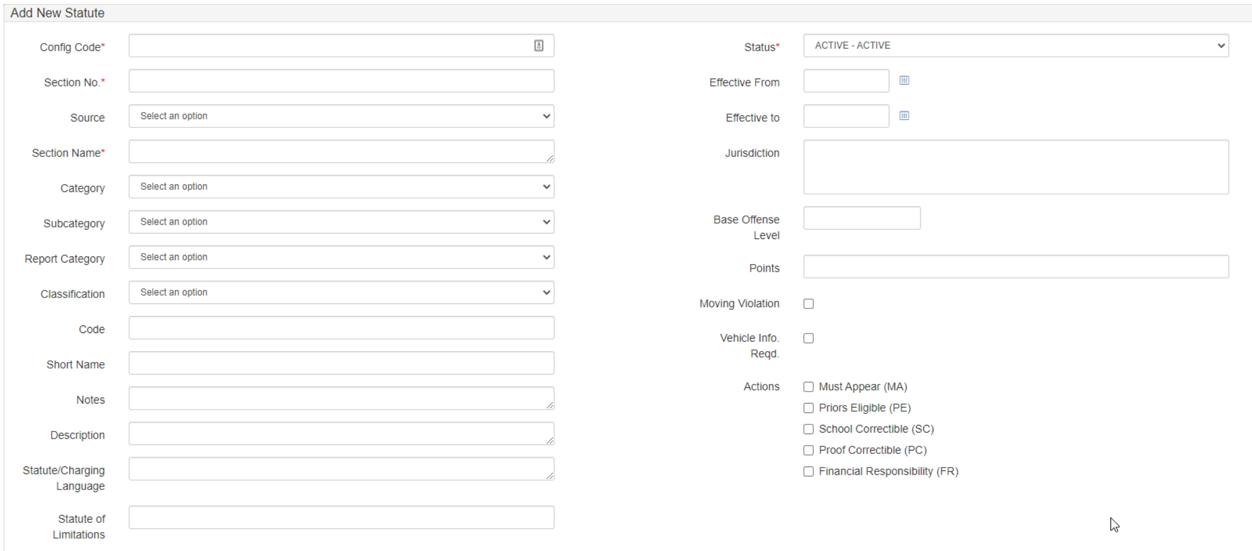
- Section Number.
- Section Name.
- Short Name.
- Code.
- Category.
- Classification.

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:



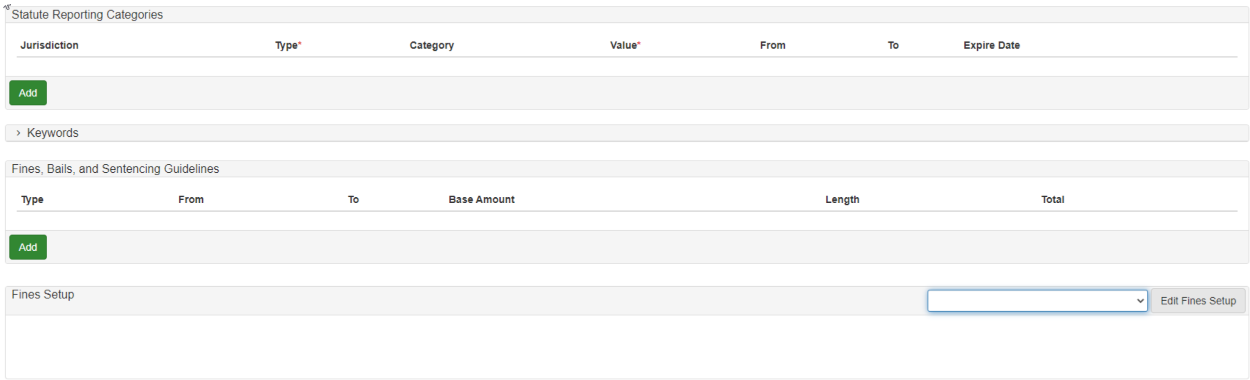
Among these options, `Config Code`, `Section Number`, and `Status` are required, while `Config Code` must also be unique. Most of these fields are text fields, with the following exceptions:

Lookup lists

Dropdown options for some fields are configured to show values from the following Lookup Lists:

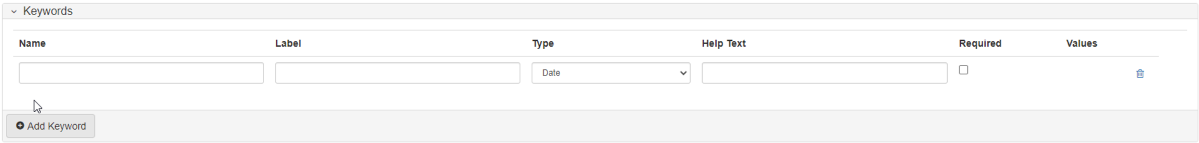
Statute Field	Lookup List Name
Source	STATUTE_SOURCE
Category	STATUTE_CATEGORY
Subcategory	STATUTE_SUBCATEGORY
Report Category	STATUTE_REPORT_CATEGORY
Classification	STATUTE_CLASSIFICATION

Collection fields

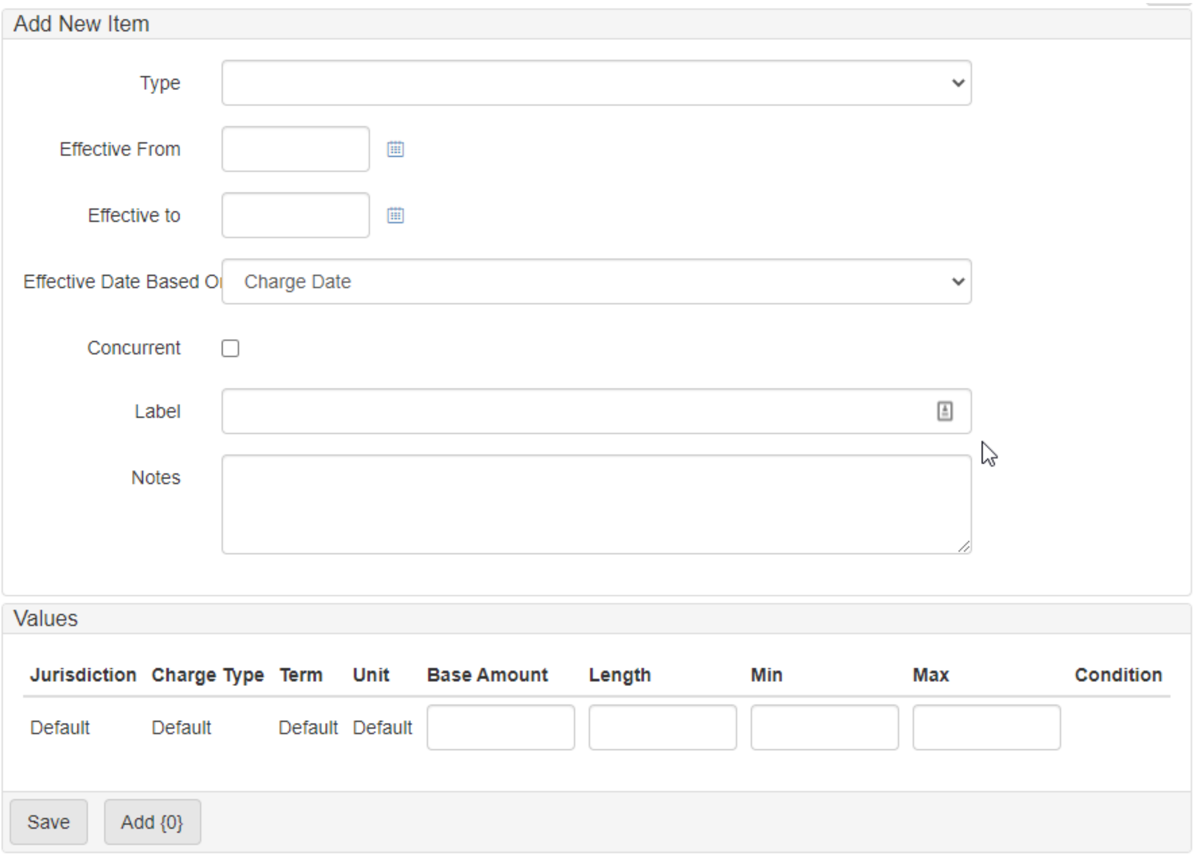


Collection fields available on a statute consist of the following entity types and are configured in the following panes on the **Add Statute** screen:

- Statute Reporting Categories.
  - Jurisdiction (Lookup List: JURISDICTIONS).
  - Type (Required).
  - Category (Lookup List: STATUTE_CATEGORY).
  - Value (Required).
- Keywords:



- Fines, Bails, and Sentencing Guidelines:



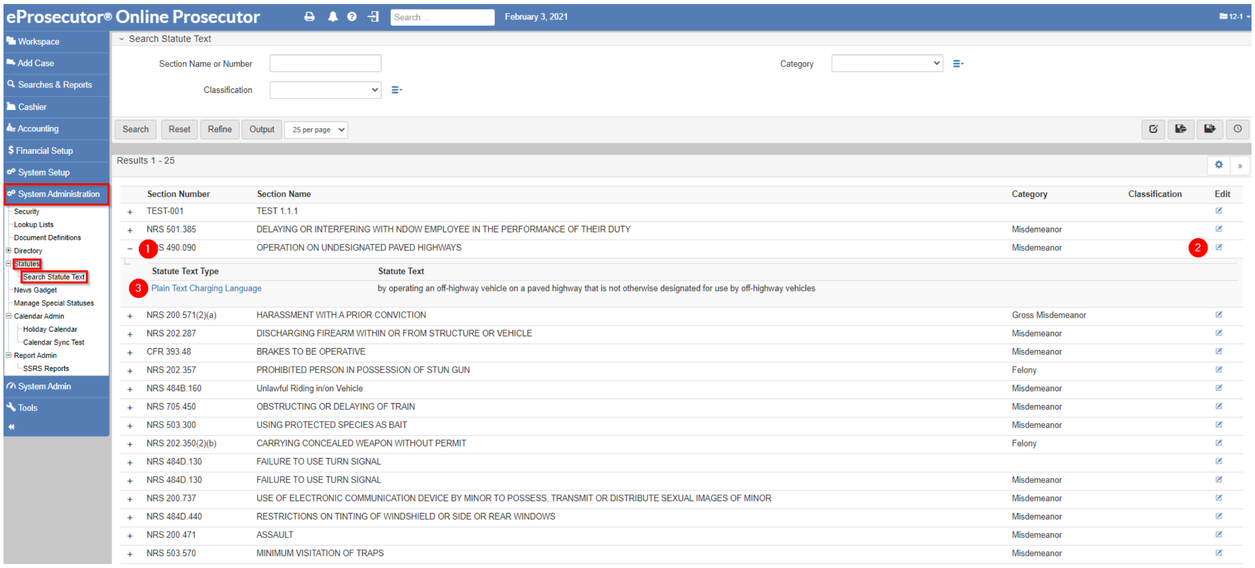
For information on adding statute texts, see https://documentation.journaltech.com/eAttorney/admin/statute_text.html.

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

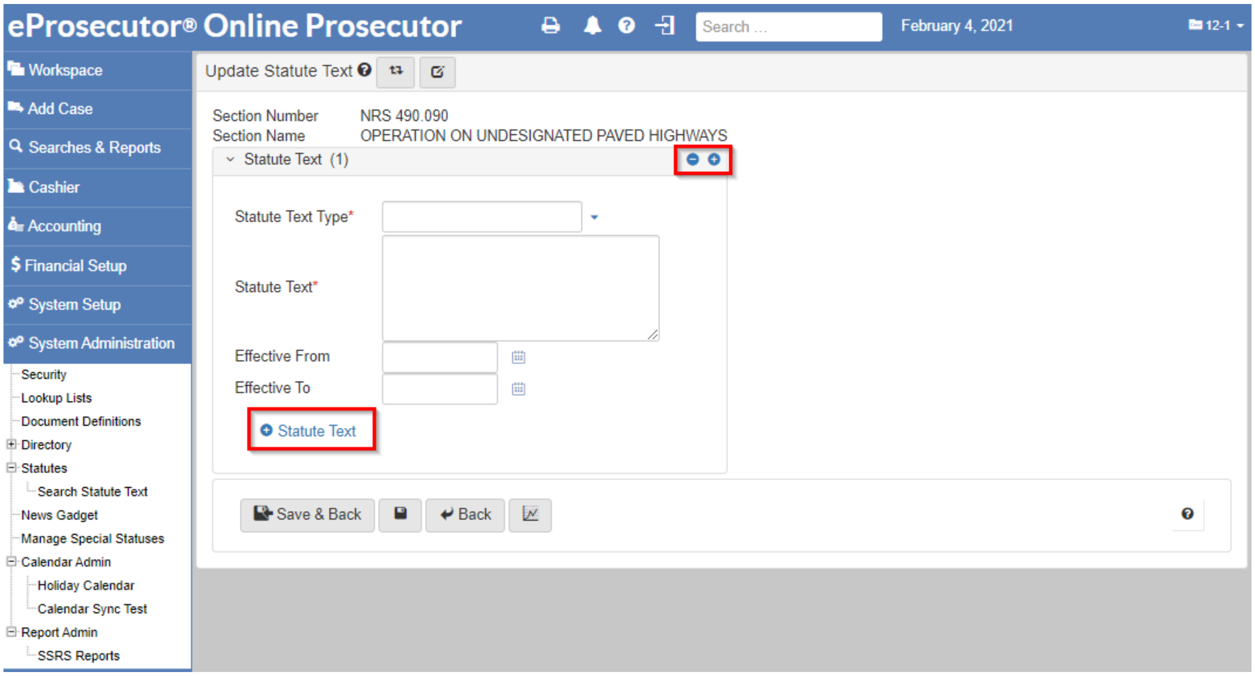
Statute texts can be found by searching for a section name or number of a statute. When the search is applied, a filtered list of statutes is displayed. To toggle the view of statute texts on a statute, simple click the plus or minus icon (1) next to the section number:



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.

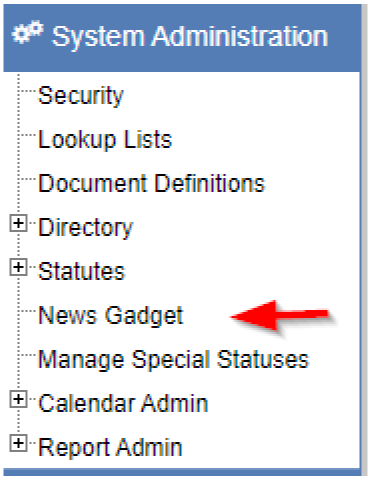


News gadget configuration

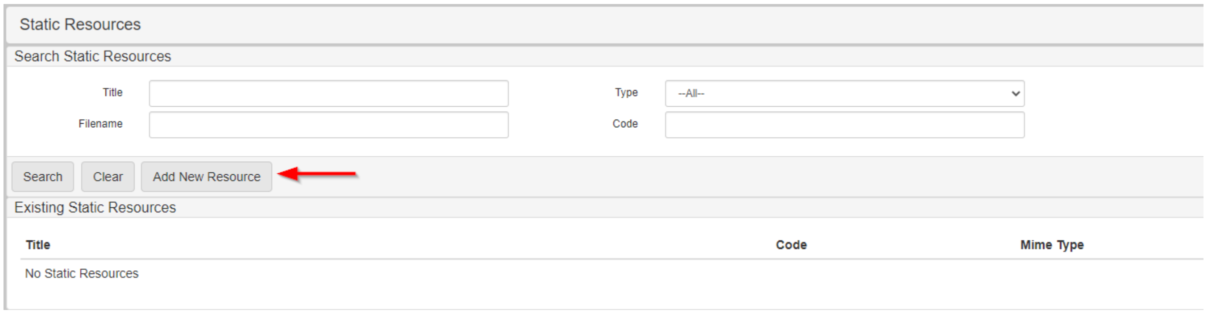
The **News Gadget** shows a message from administrators on users dashboards. To learn how users can add the gadget to their dashboards, see News gadget.

How to change the news gadget content

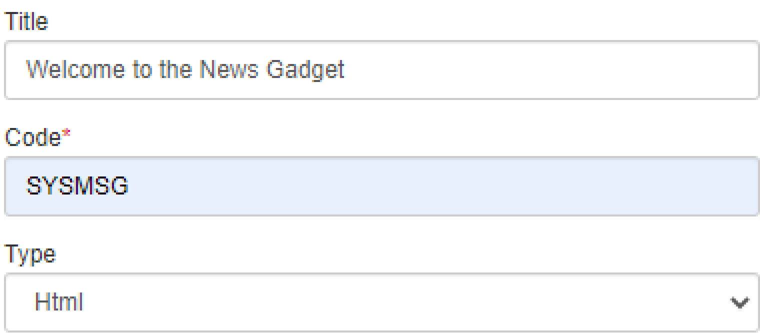
1. Go to **Left navigation pane** › **System Administration** › **News Gadget**.



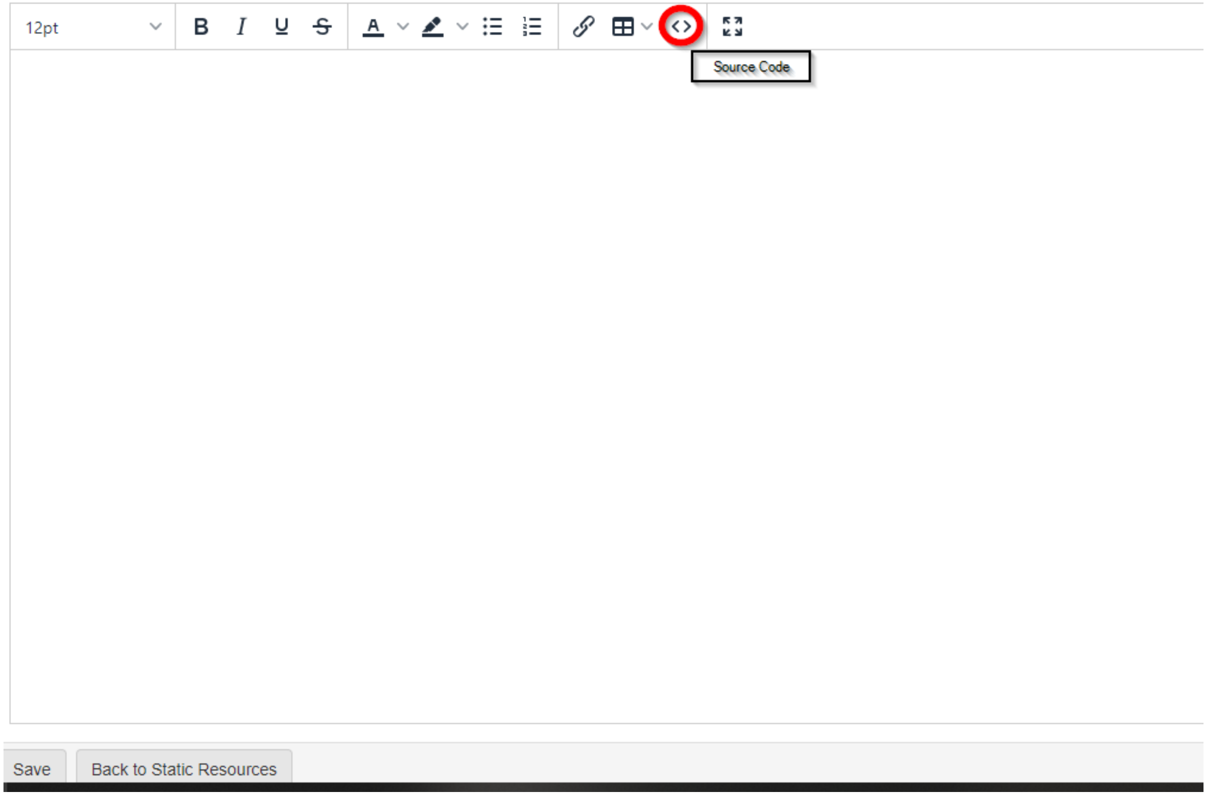
2. This opens the "Search Static Resources" form. Click the "Add New Resource" button.



3. Give the resource a title, and enter `SYSMSG` as the code. Leave the type as `HTML`.



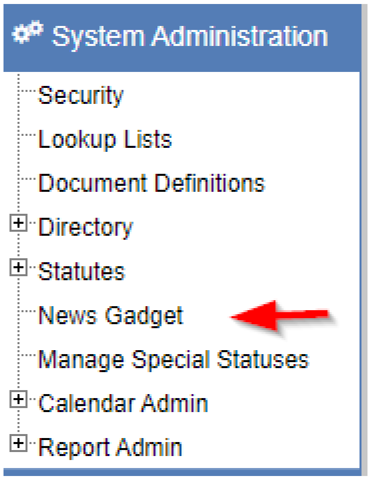
4. In the text box, enter the message you want to display on users dashboard news gadget. This is a WYSIWYG (What You See Is What You Get) editor, with a tool bar that allows for formatting items, inserting tables or links. You can also click **[Source Code]**, circled in red, to edit the HTML directly. This needs to be done if adding an image. See Add images to news gadget.



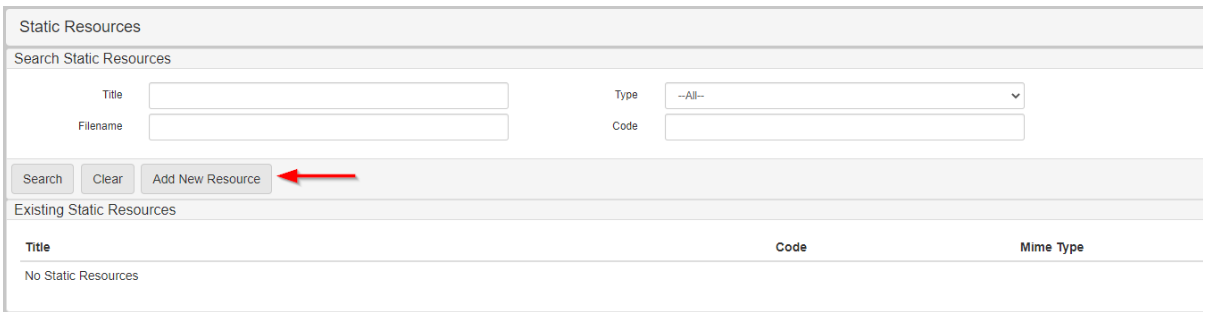
5. Click **[Save]** at the bottom to save the changes.

Add images as a static resource

1. Go to **Left navigation pane › System Administration › News Gadget**.

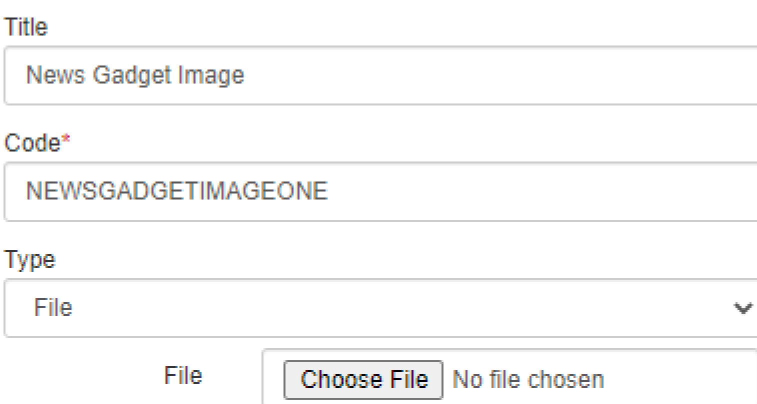


2. This opens the **Search Static Resources** form. Click **[Add New Resource]**.



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`.

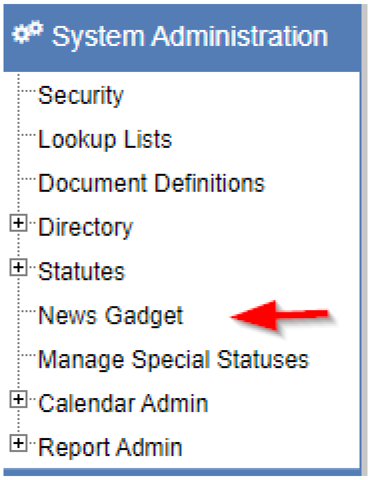


4. Click **[Choose File]** to select the image to select the image.

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.

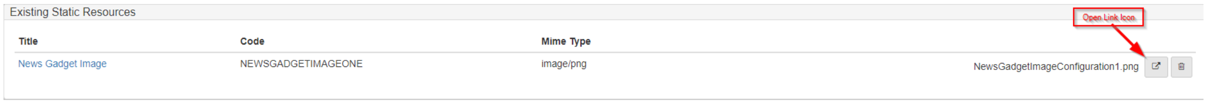
Add images to news gadget

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:

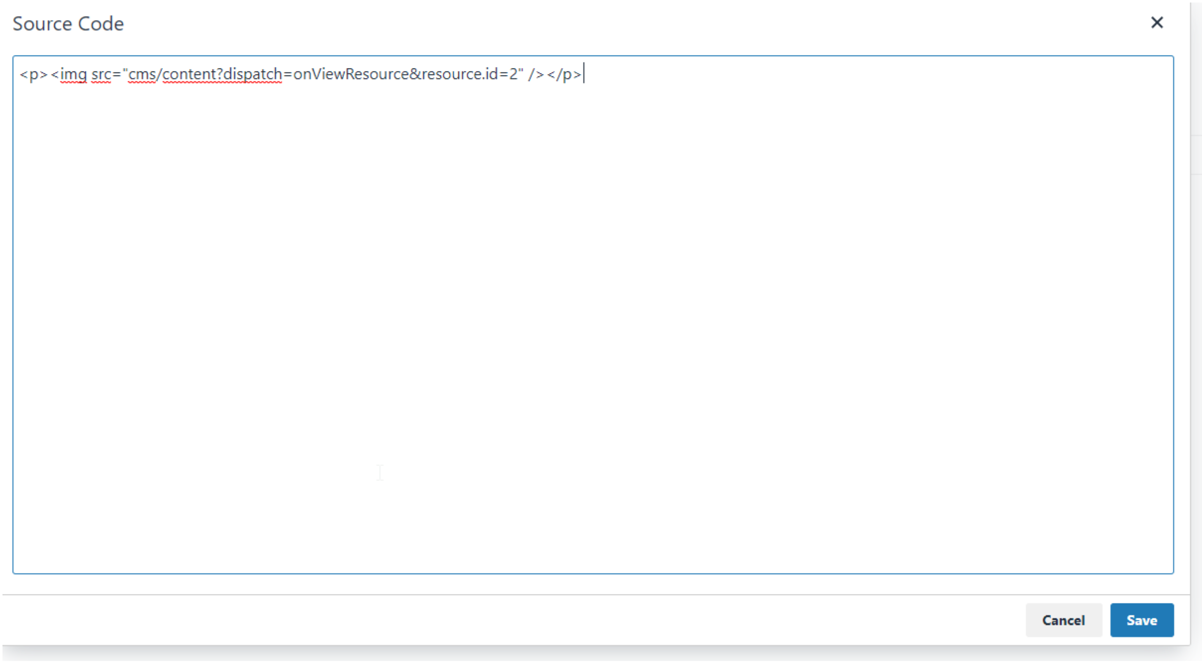


   Hover over button, showing URL at the bottom:

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><img src="cms/content?dispatch=onViewResource&resource.id=2" /></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.



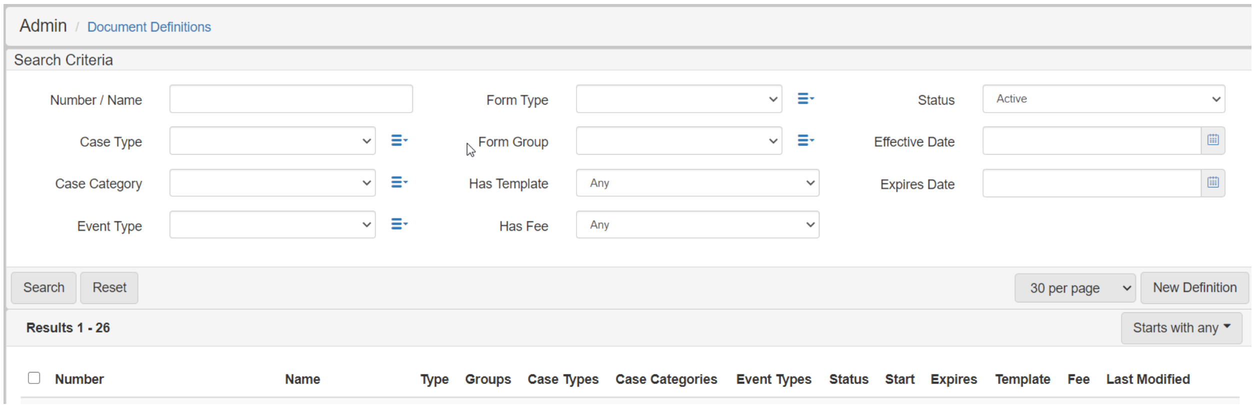
Document definitions

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

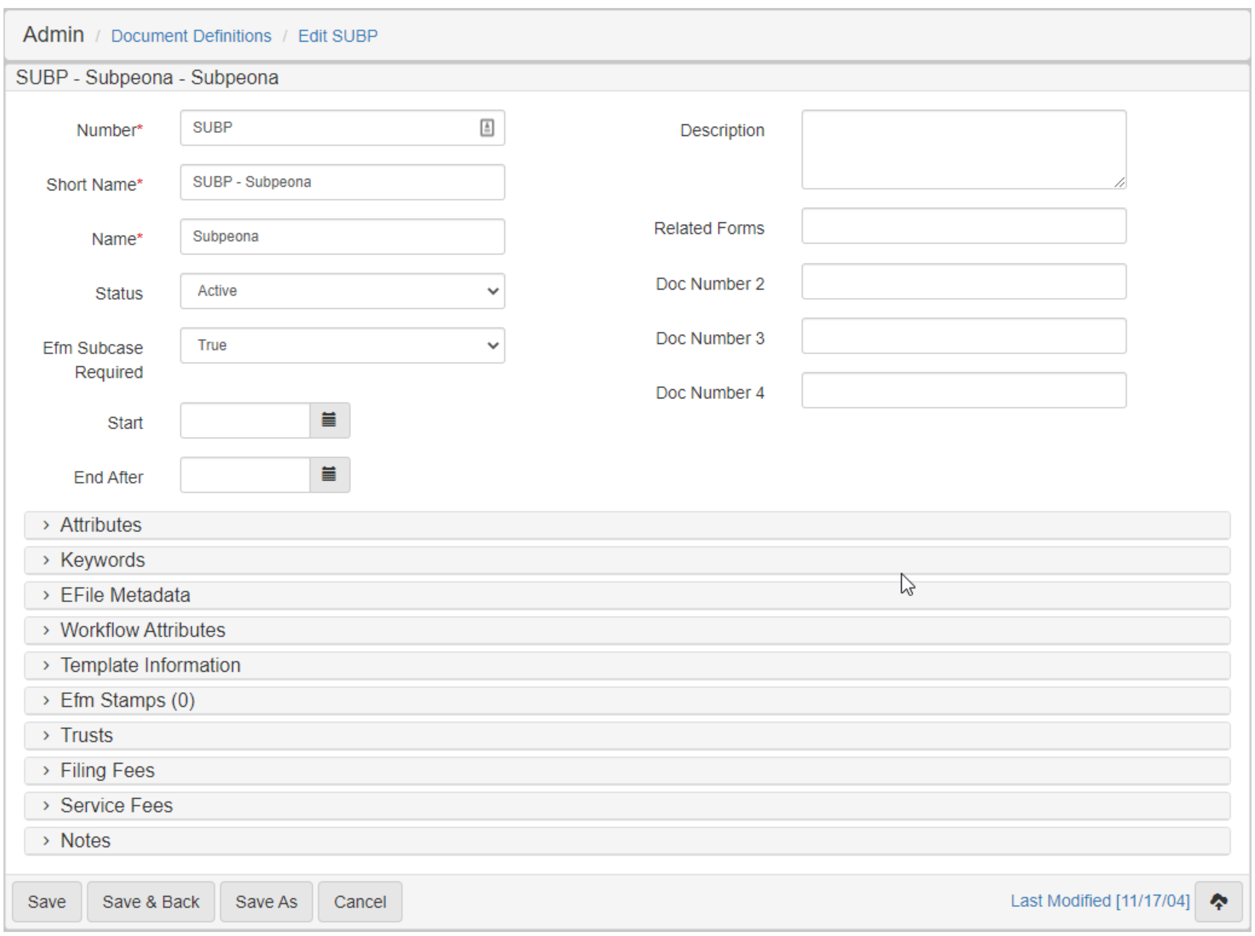
The Document Definitions search screen:



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.



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	

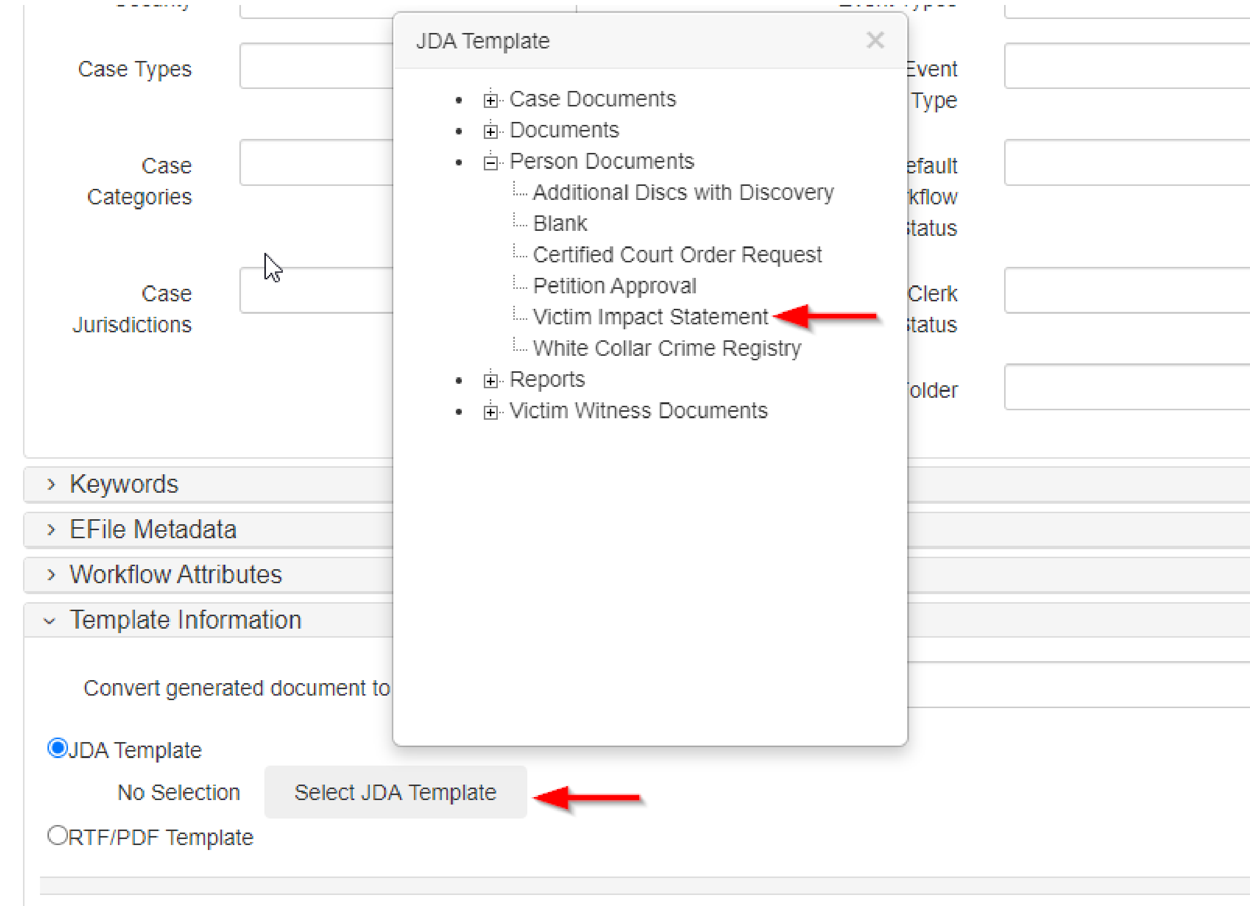
Set the Form Type to JDA 4 when the Document Definition has a JDA template attached to it.
Mugshot
Use this Form Type for Document Definitions that represent a mugshot.
Scan/Upload
Set the Form Type to Scan/Upload to have a Document Definition show on the **File Type** field on the **Add File** forms 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.

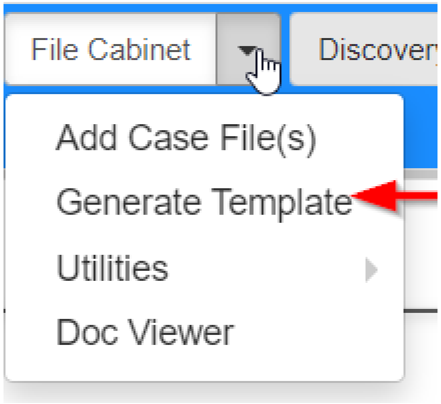
To add a JDA template to a Document Definition, expand the **Template Information** section, then click the **JDA Template** radio button. Finally, click the **Select JDA Template** and choose your template.

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.

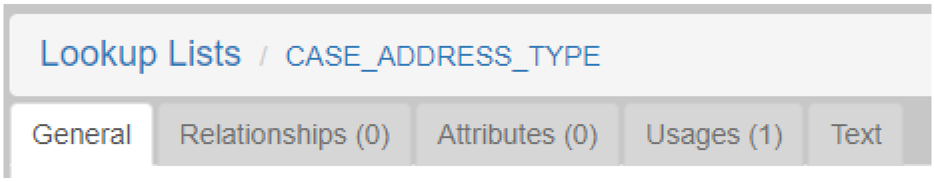


If you add a JDA template to a Document Definition, it is recommended that you change the Form Type to `JDA 4`.

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.

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.

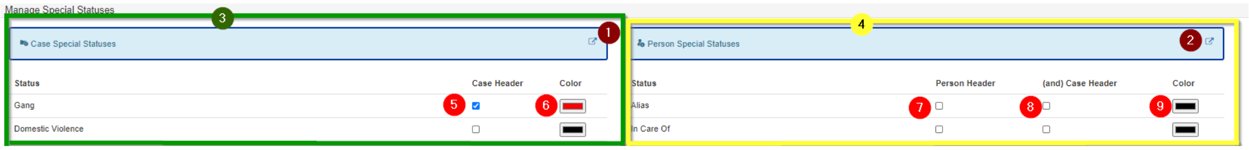
Text

This tab shows all items line separated in a plain readable list as `<code>,<description>`.

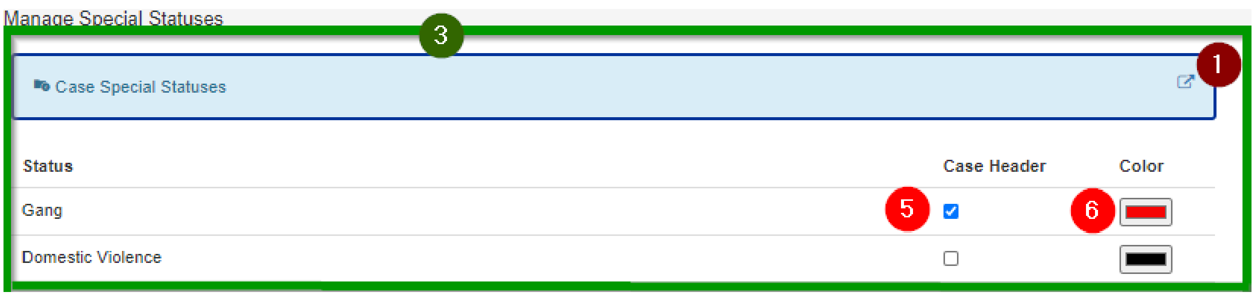
Managing special statuses

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.

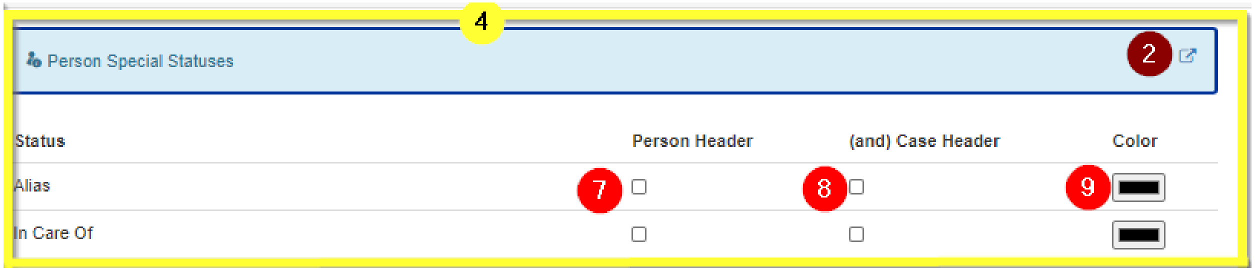
Full screen:



Case Special Status section:

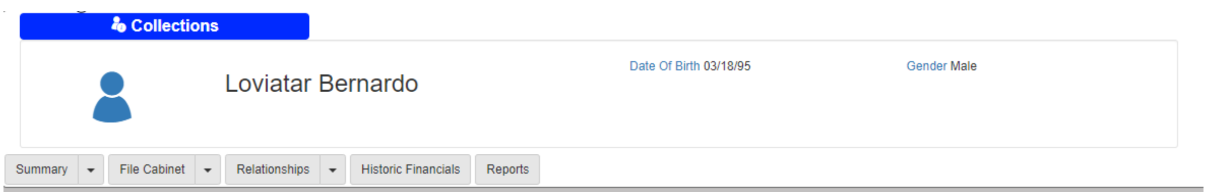


Person Special Status Section:



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.

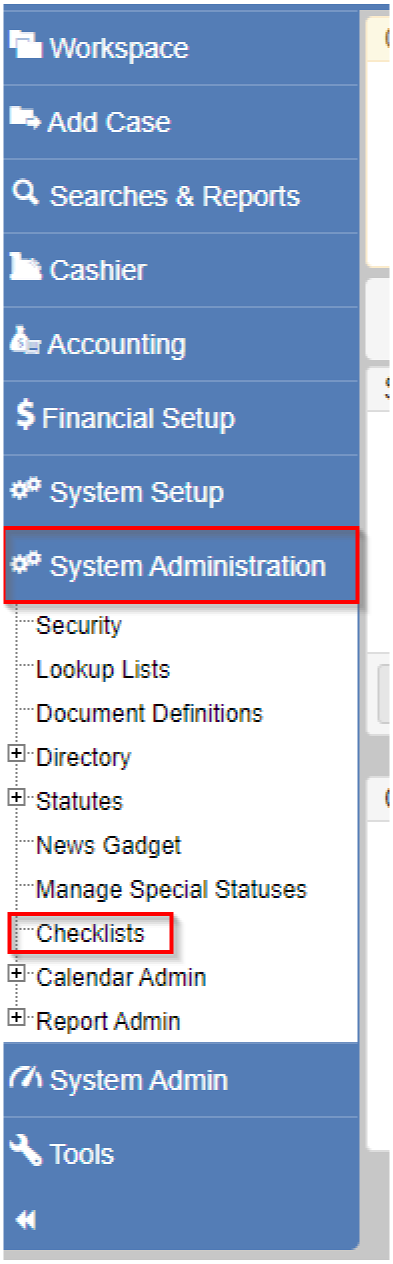


8. When checked, person special status is shown before the **case** header, if anyone involved on the case has that status:

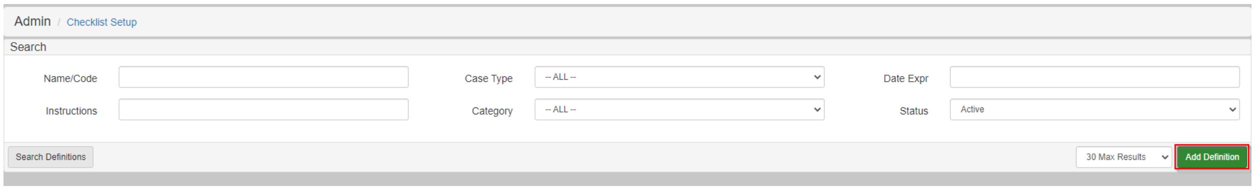
9. Background color of the status on the person and case header.

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.

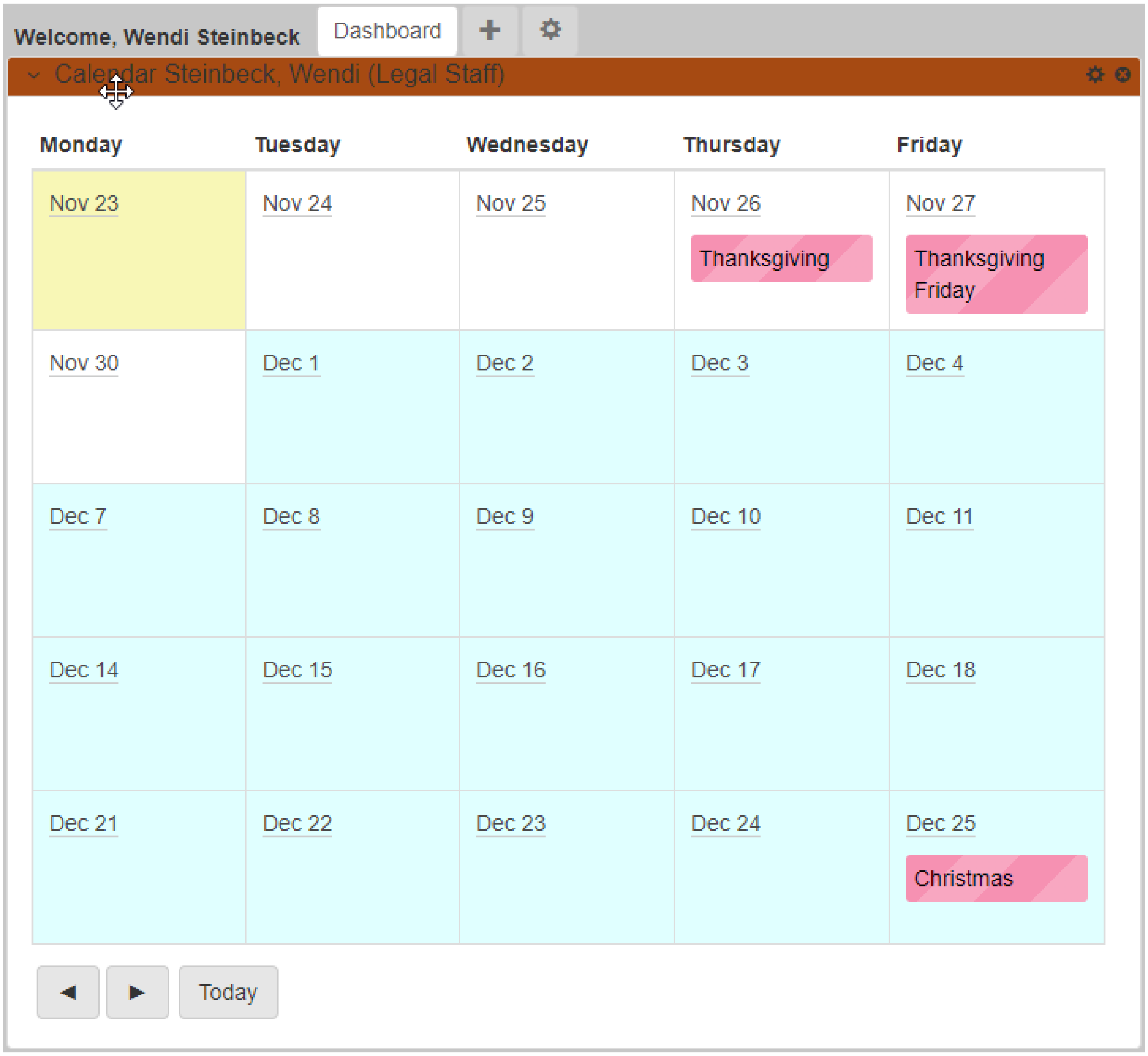
On each item only the "Instructions" field is required, but you may add a description and Due Date rules if desired. When you are finished, click **[Save]**.

> For information on adding checklists to cases, see https://documentation.journaltech.com/eAttorney/user/cases/tasks.html.

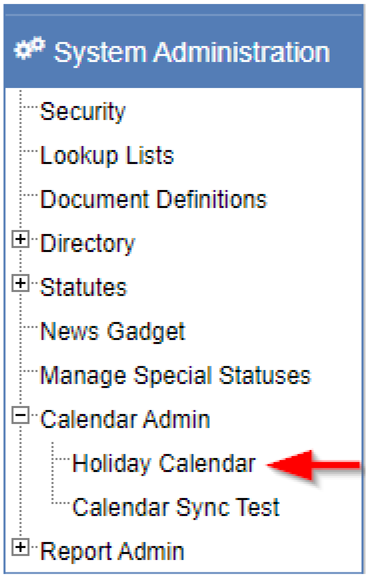
Calendar administration

Holiday calendar

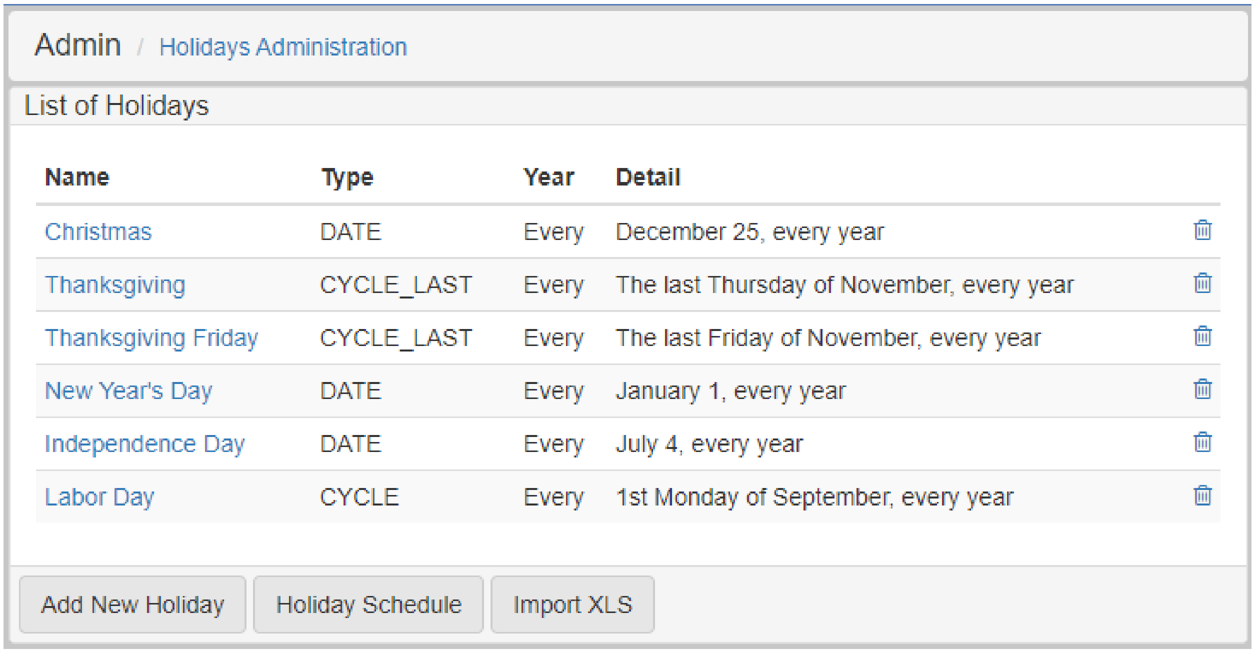
The holiday calendar is used to setup recurring holidays that your agency observes. These holidays show on calendars in eAttorney, and aid you in scheduling.



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:

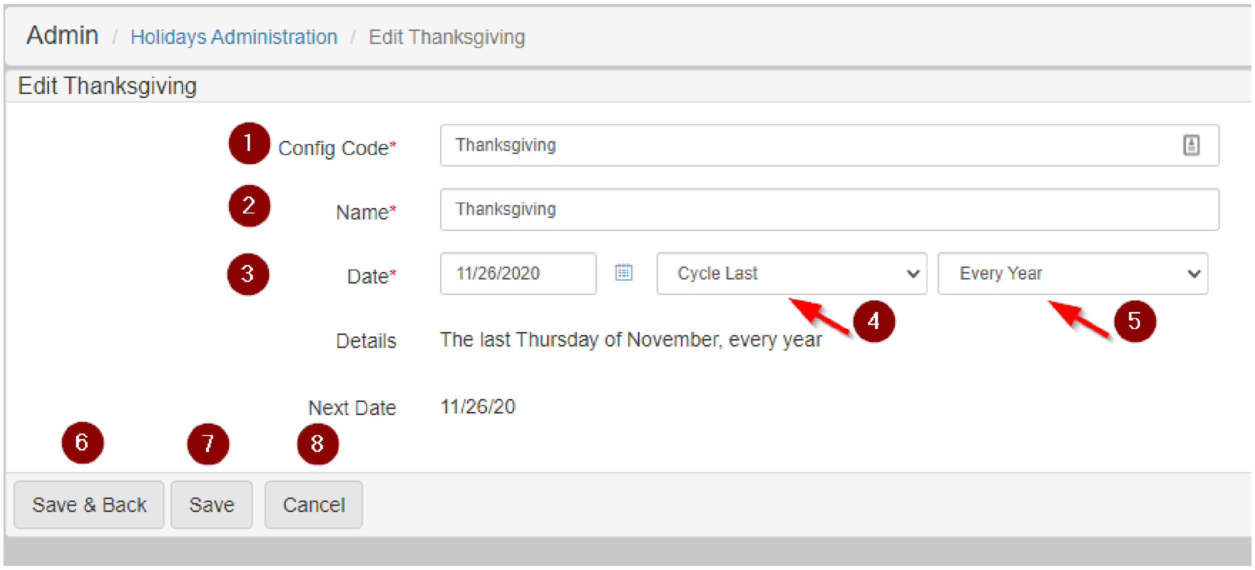


Name	Type	Year	Detail
Christmas	DATE	Every	December 25, every year
Thanksgiving	CYCLE_LAST	Every	The last Thursday of November, every year
Thanksgiving Friday	CYCLE_LAST	Every	The last Friday of November, every year
New Year's Day	DATE	Every	January 1, every year
Independence Day	DATE	Every	July 4, every year
Labor Day	CYCLE	Every	1st Monday of September, every year

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

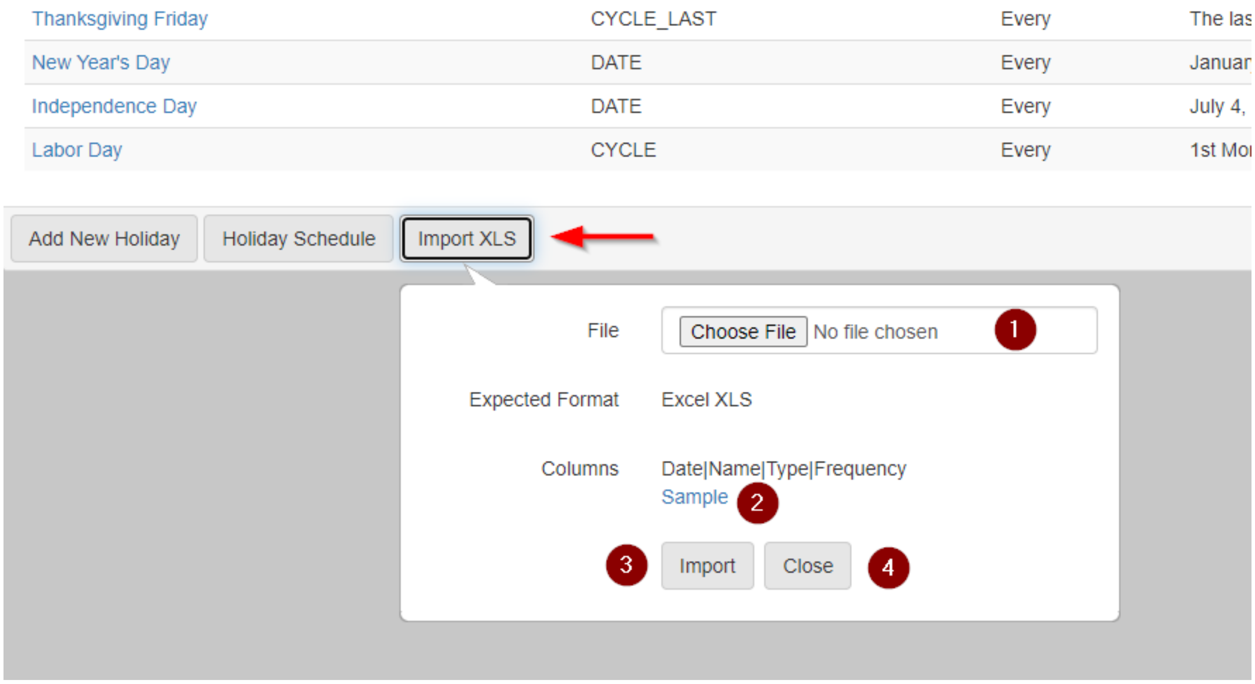
To add a new holiday, click **[Add New Holiday]** at the bottom of the screen. To edit an existing holiday, click the holiday name:



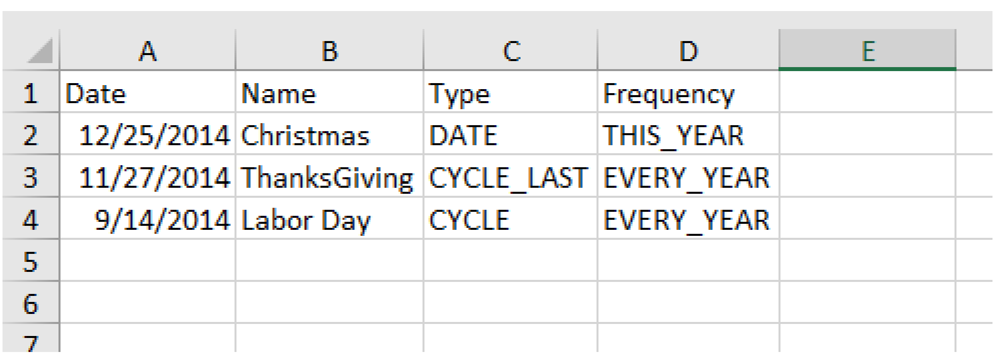
1. **Config Code**: Set the system code that identifies the holiday.
2. **Name**: Set the holiday name that shows on the calendars.
3. **Date**: Set the date the holiday occurs this year.
4. **Type**: Select one of three options:
   - **Date**: The holiday occurs on the day entered in the date field. 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.



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.

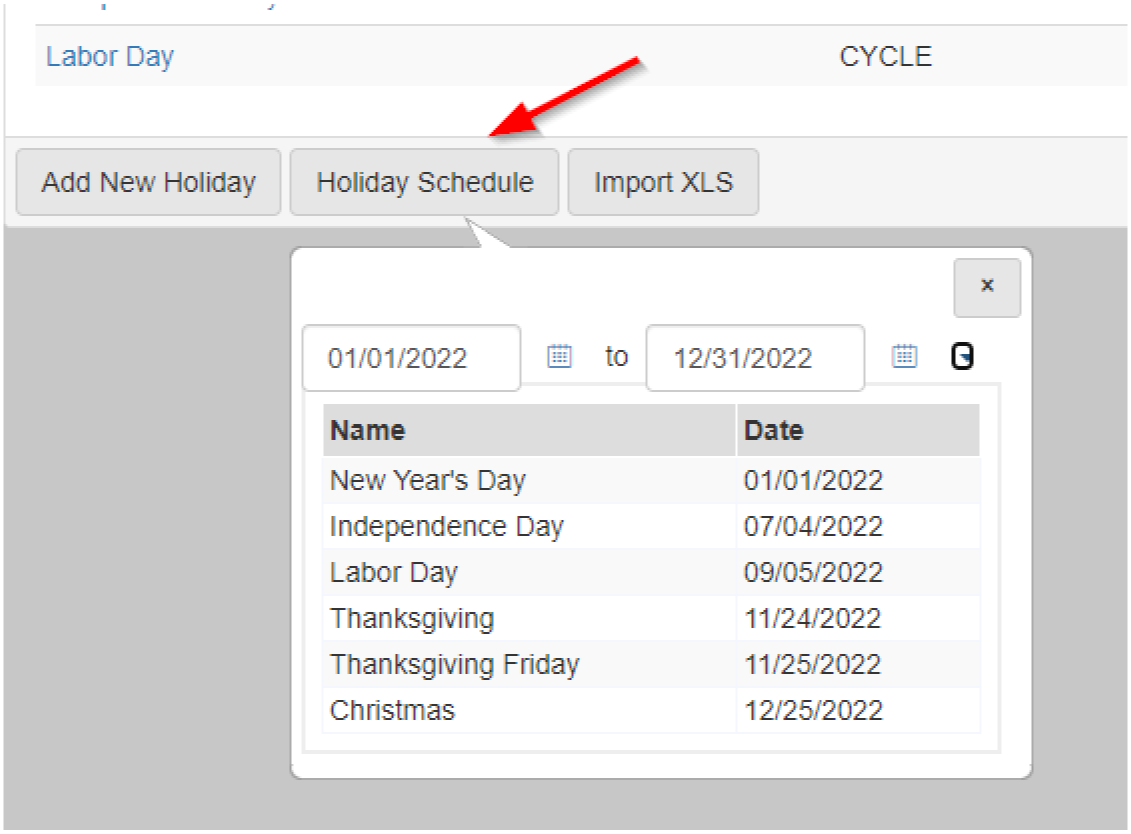


	A	B	C	D	E
1	Date	Name	Type	Frequency	
2	12/25/2014	Christmas	DATE	THIS_YEAR	
3	11/27/2014	ThanksGiving	CYCLE_LAST	EVERY_YEAR	
4	9/14/2014	Labor Day	CYCLE	EVERY_YEAR	
5					
6					
7					

After clicking the **Import** button, the new holidays show up in the list.

Holiday schedule

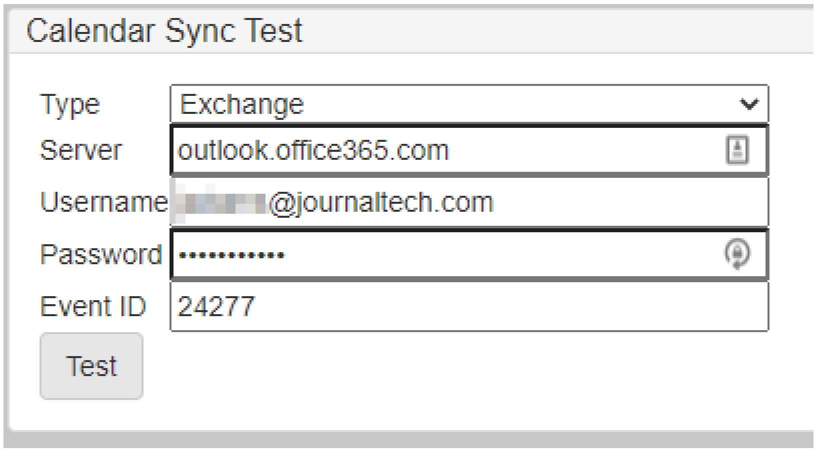
You can view what upcoming holidays there are by clicking the **Holiday Schedule** button at the bottom of the Holidays Administration page.



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.



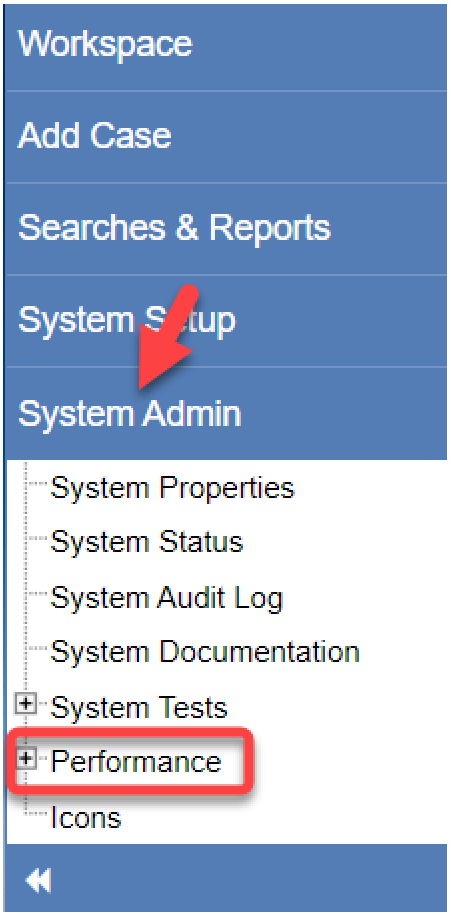
To test how and event syncs to a calendar, you need to fill in the fields with the appropriate data.

- **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.

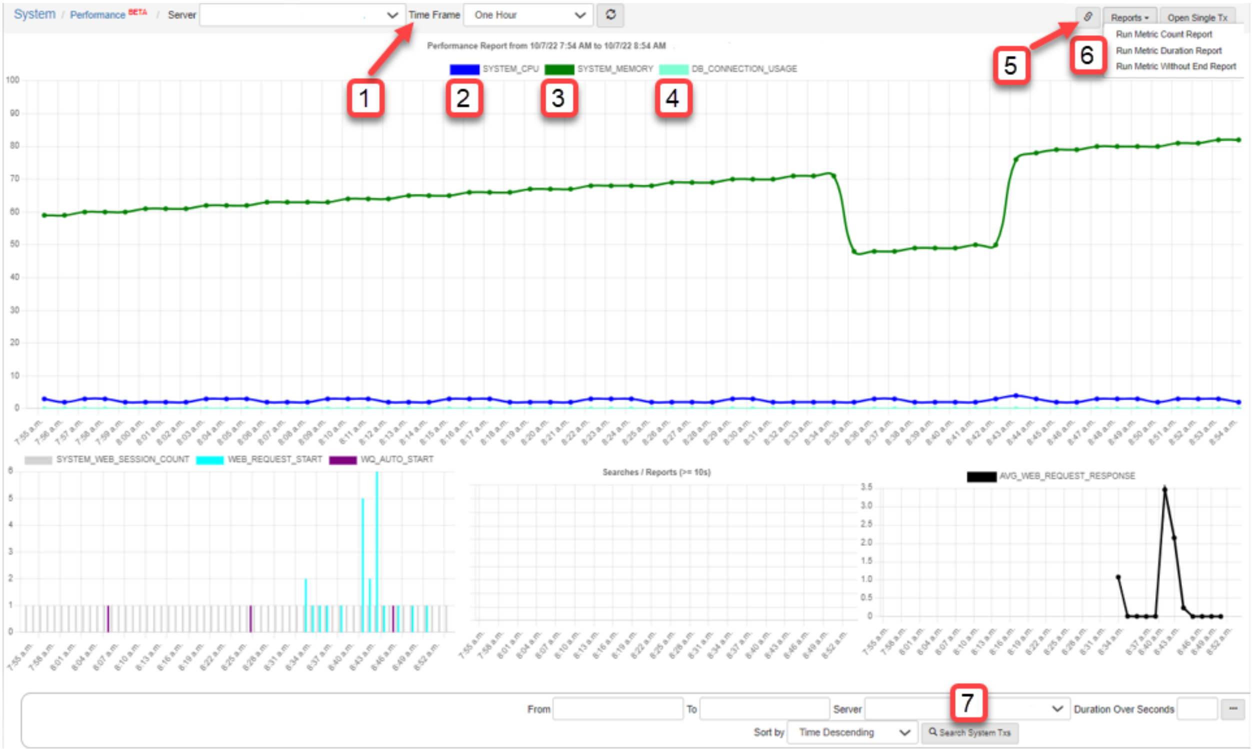
Performance logs

- 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.

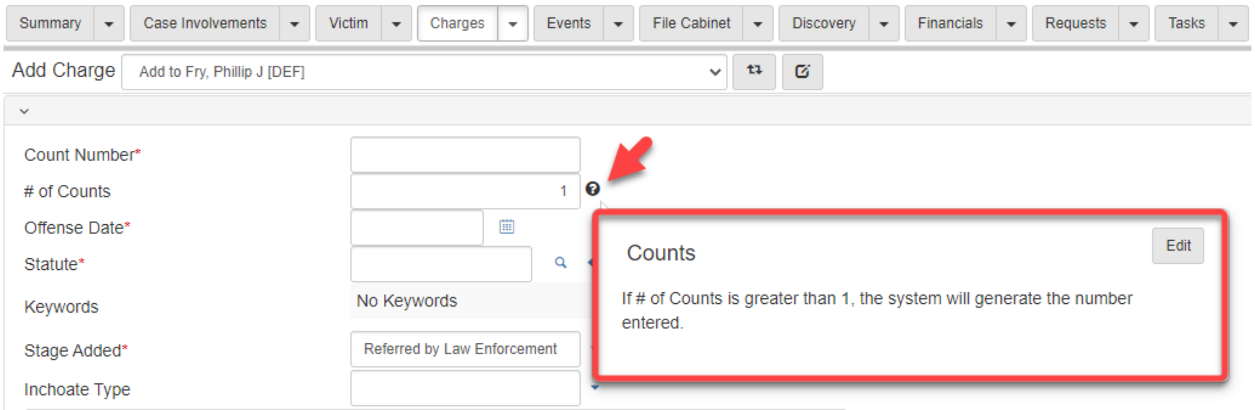
7. You can also search system Txs.

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.

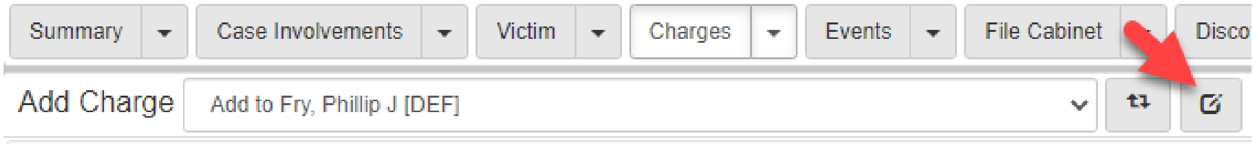
Access a help note

To access a help note, click the help note icon. The following is an example help note.

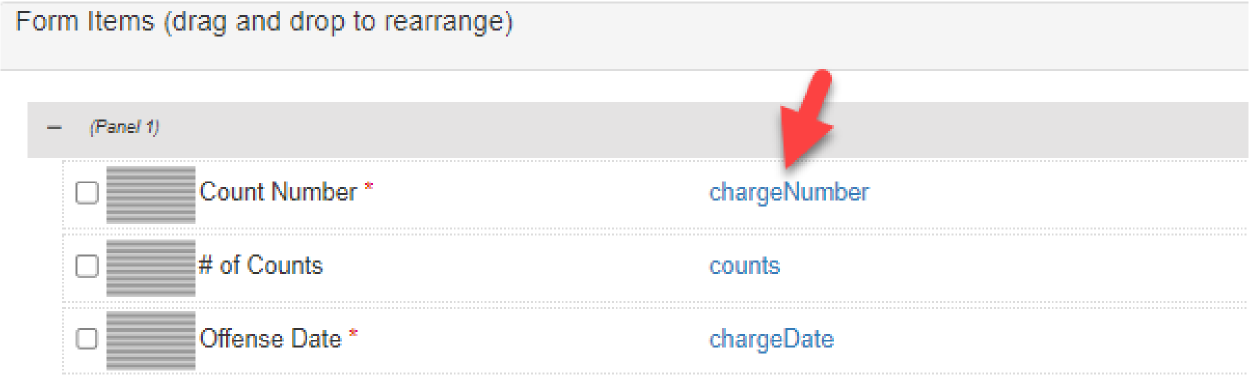


Add a help note

To add a help note to a field, navigate to an edit form.

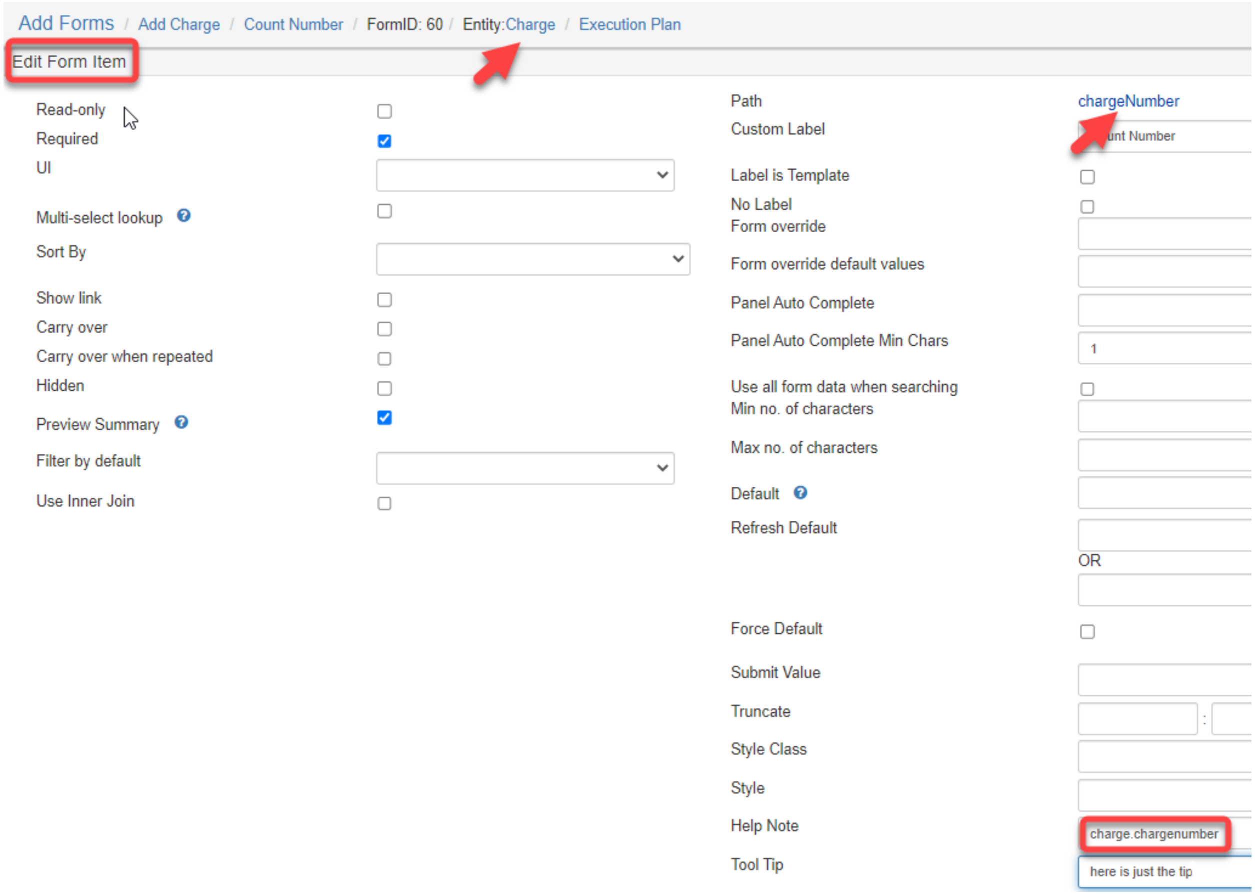


Once in the edit form, click the field in which you want to add the help note.

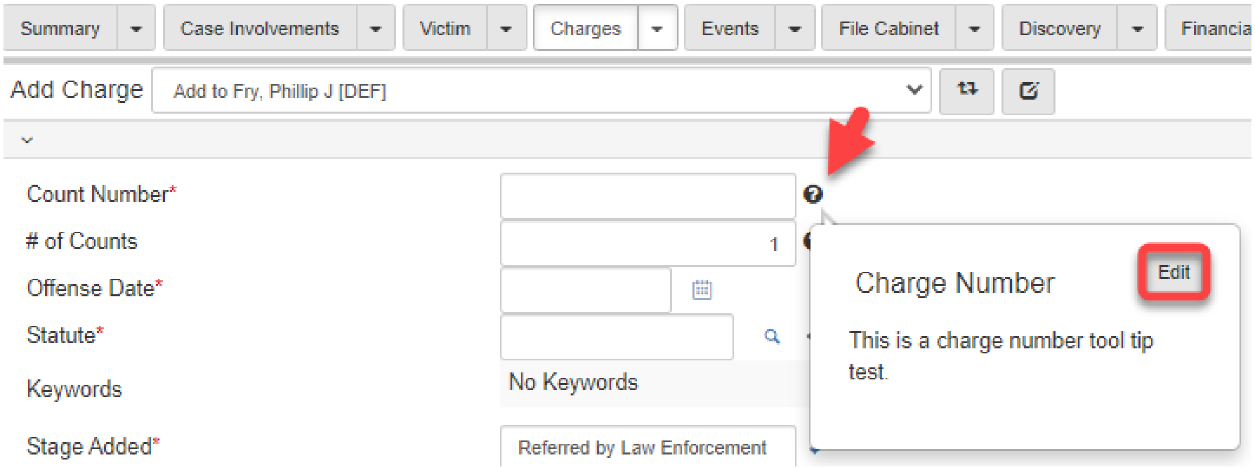


Once in the **Edit Form Item**, type in the help note box your entity, then a period, then your path.

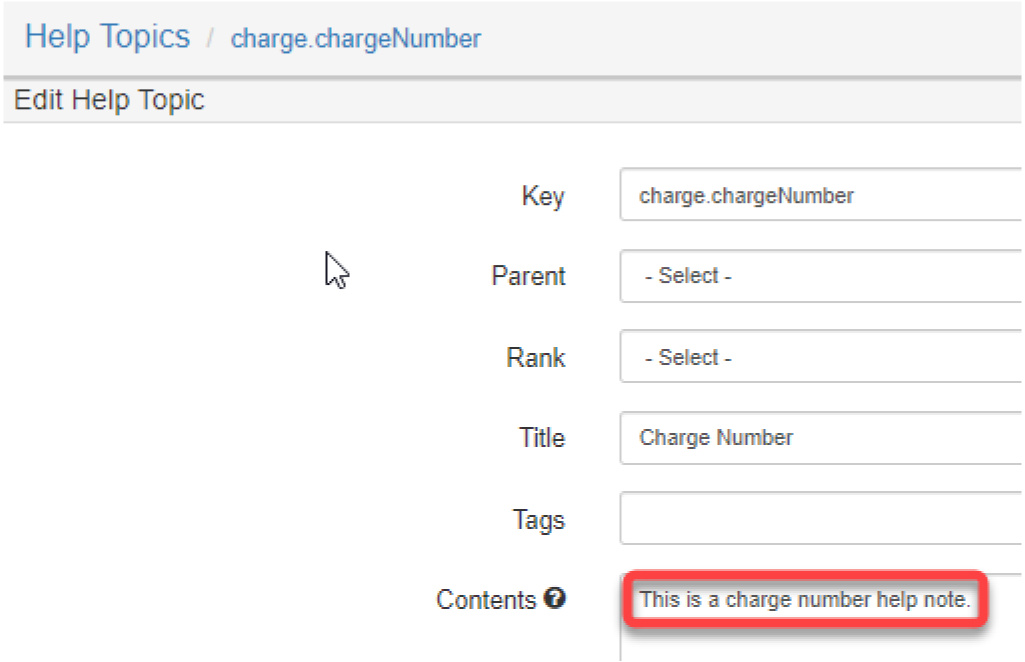
Click **[Update & Back]** or **[Update]**.



Once on your form, you can click the help note icon, then click **[Edit]**.



In the **Edit Help Topic** screen, you can type the contents of your help note. Click **[Save]**.

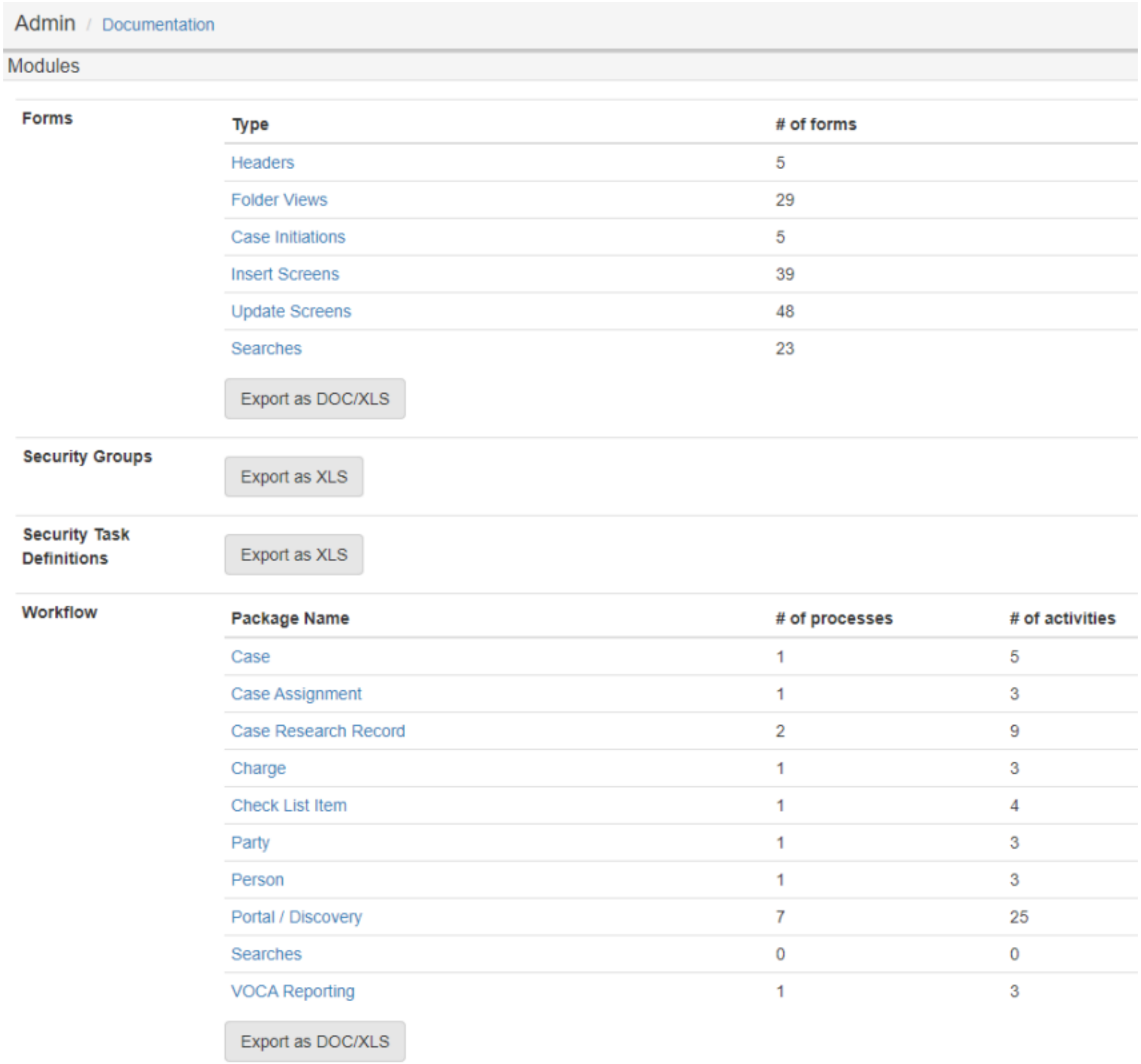


System documentation

Documentation

1. To view the system documentation, type in the following addition to your already existing URL: `/ecms/admin/documentation`:

2. A screen shows that includes your system documentation:



Admin / 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

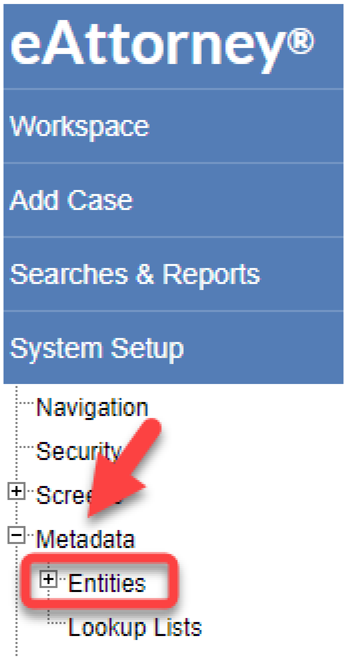
Workflow

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

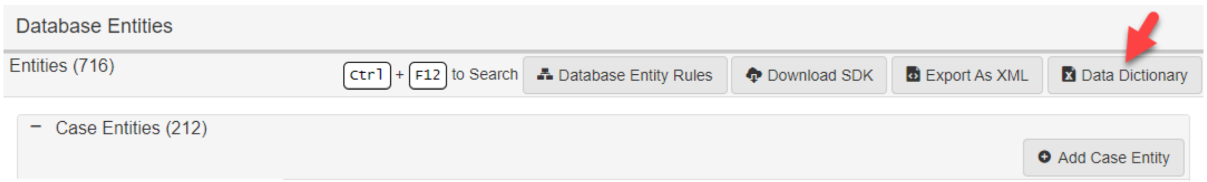
Export as DOC/XLS

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.

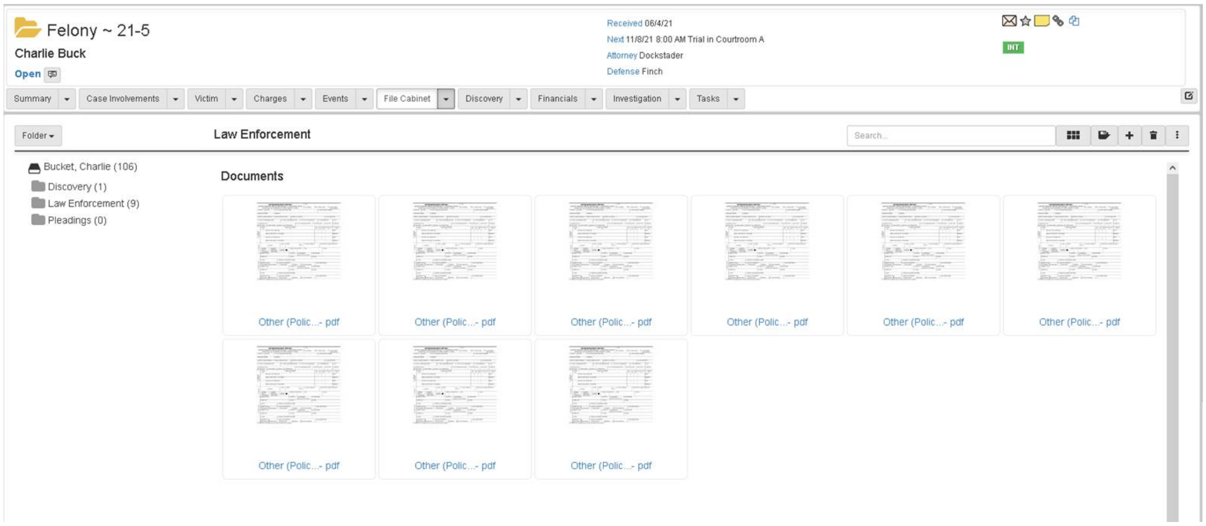


3. Business processes

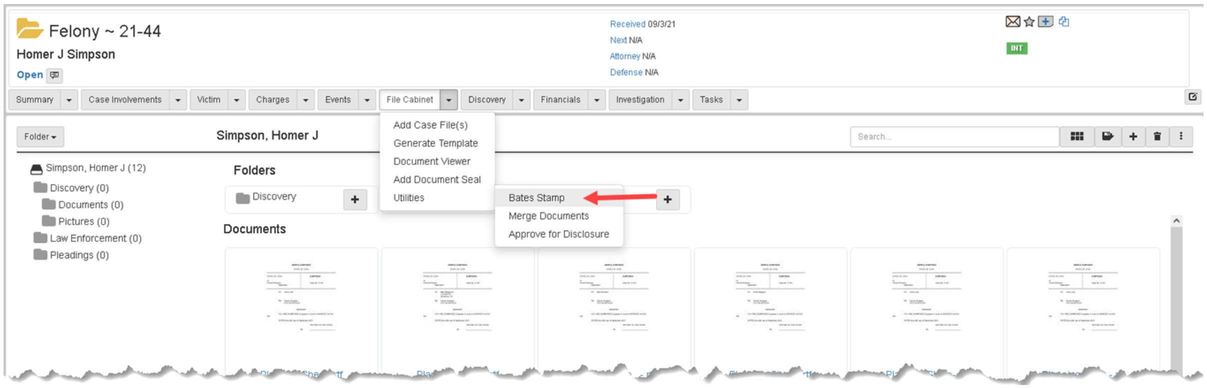
This section describes the business processes available in eAttorney.

Bates stamping

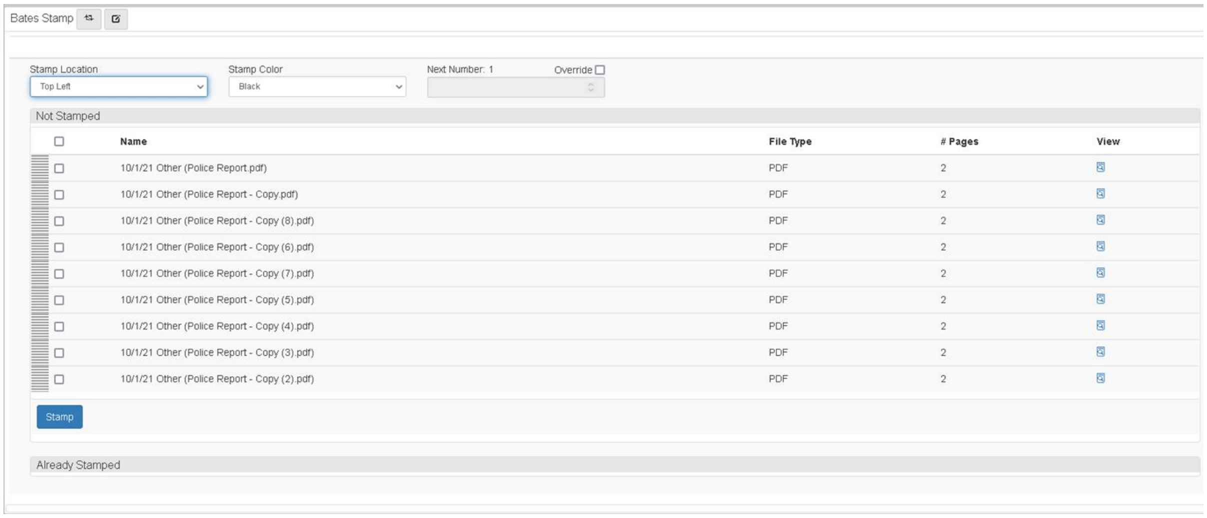
1. On the **File Cabinet Folder View**, click the dropdown menu:



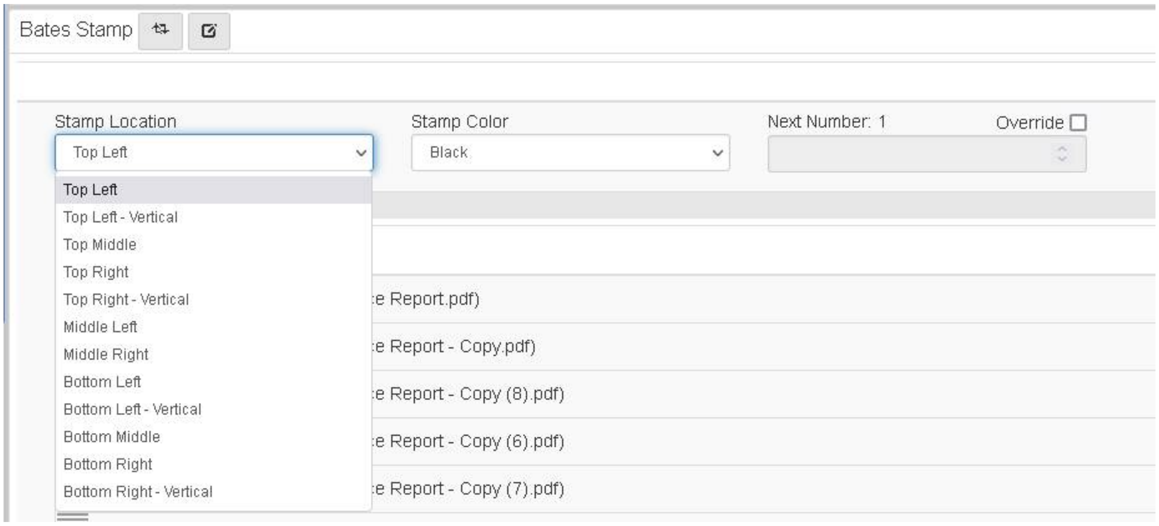
2. Hover over **Utilities** and select **Bates Stamp**. The **Bates Stamp** screen shows:



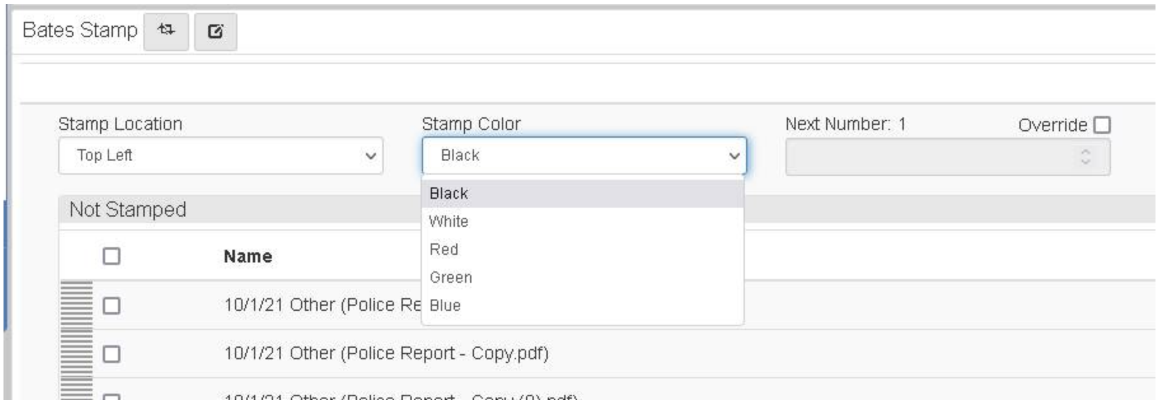
3. The **Bates Stamp** screen provides the following capabilities:



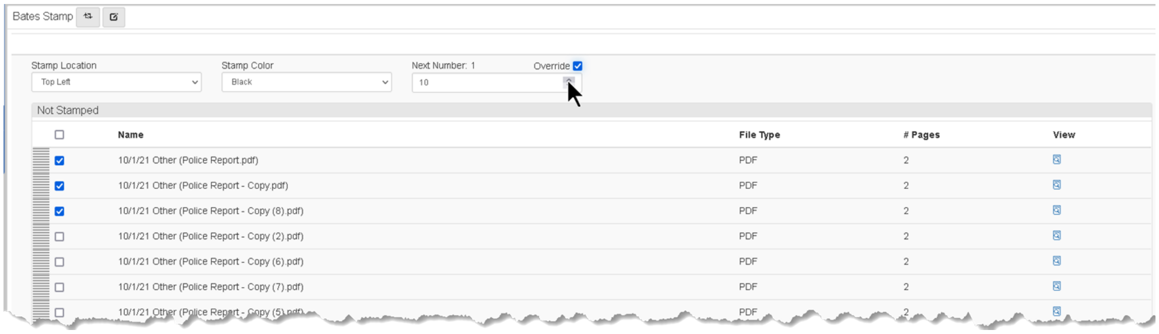
- Select the stamp location:



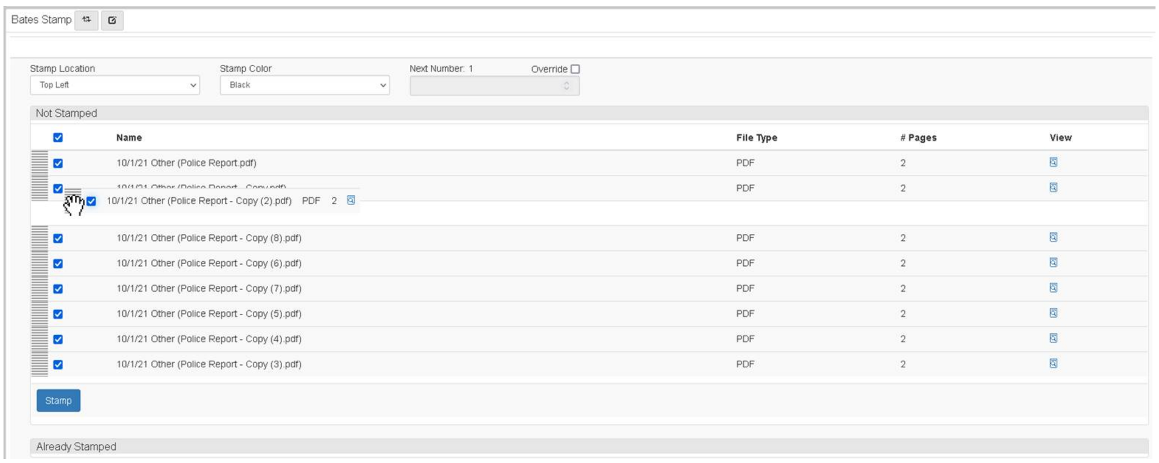
- Select the stamp color:



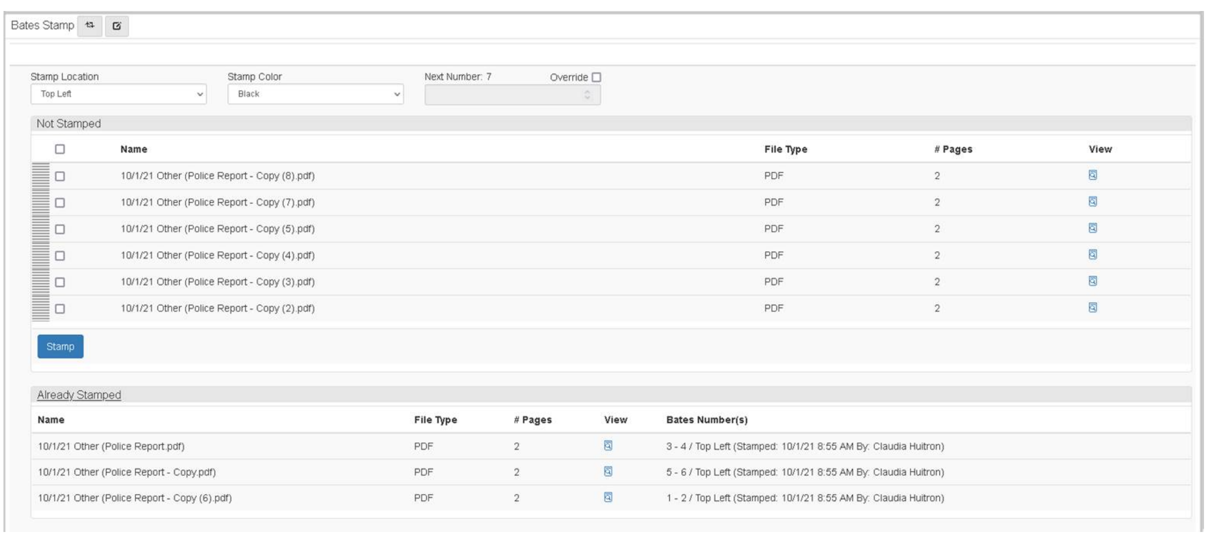
- Override the next number, if needed:



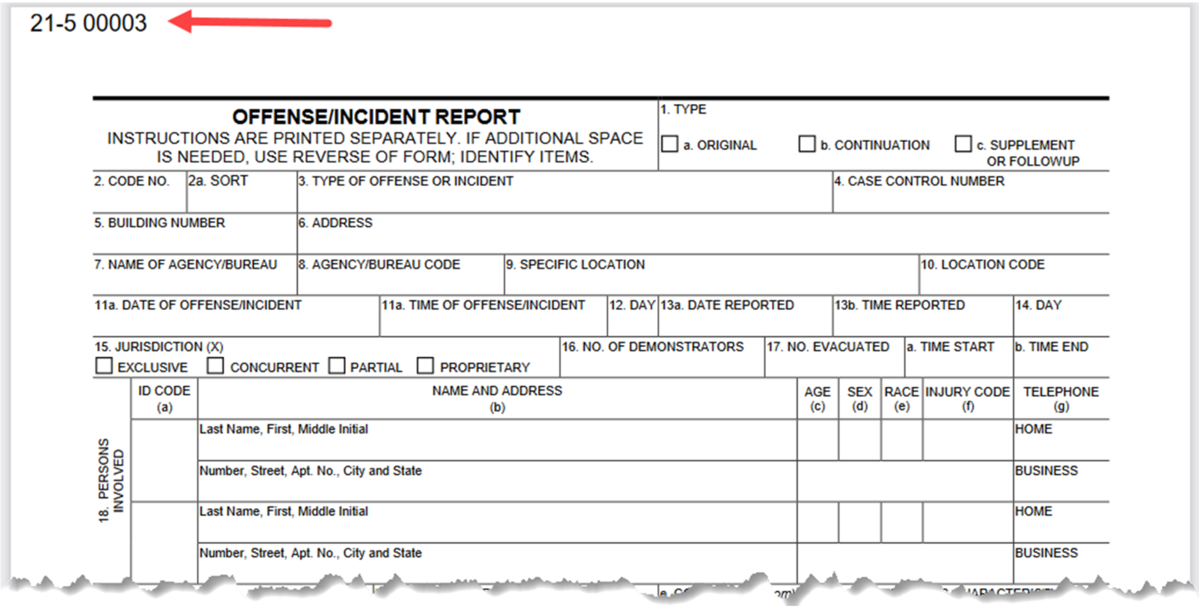
- Drag and drop the documents to order them accordingly:



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

a. ORIGINAL | b. CONTINUATION | 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

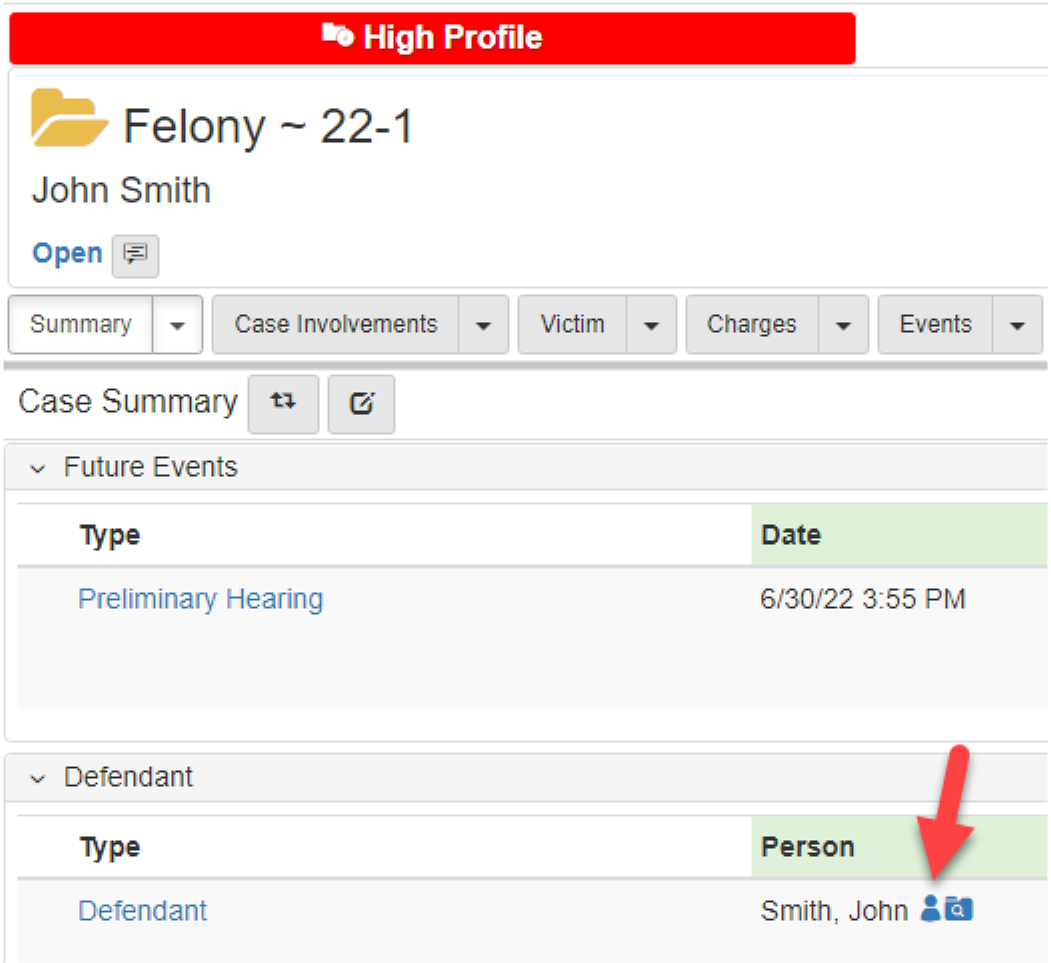
11a. DATE OF OFFENSE/INCIDENT | 11a. TIME OF OFFENSE/INCIDENT | 12. DAY | 13a. DATE REPORTED | 13b. TIME REPORTED | 14. DAY

15. JURISDICTION (X) EXCLUSIVE | CONCURRENT | PARTIAL | PROPRIETARY | 16. NO. OF DEMONSTRATORS | 17. NO. EVACUATED | a. TIME START | b. TIME END

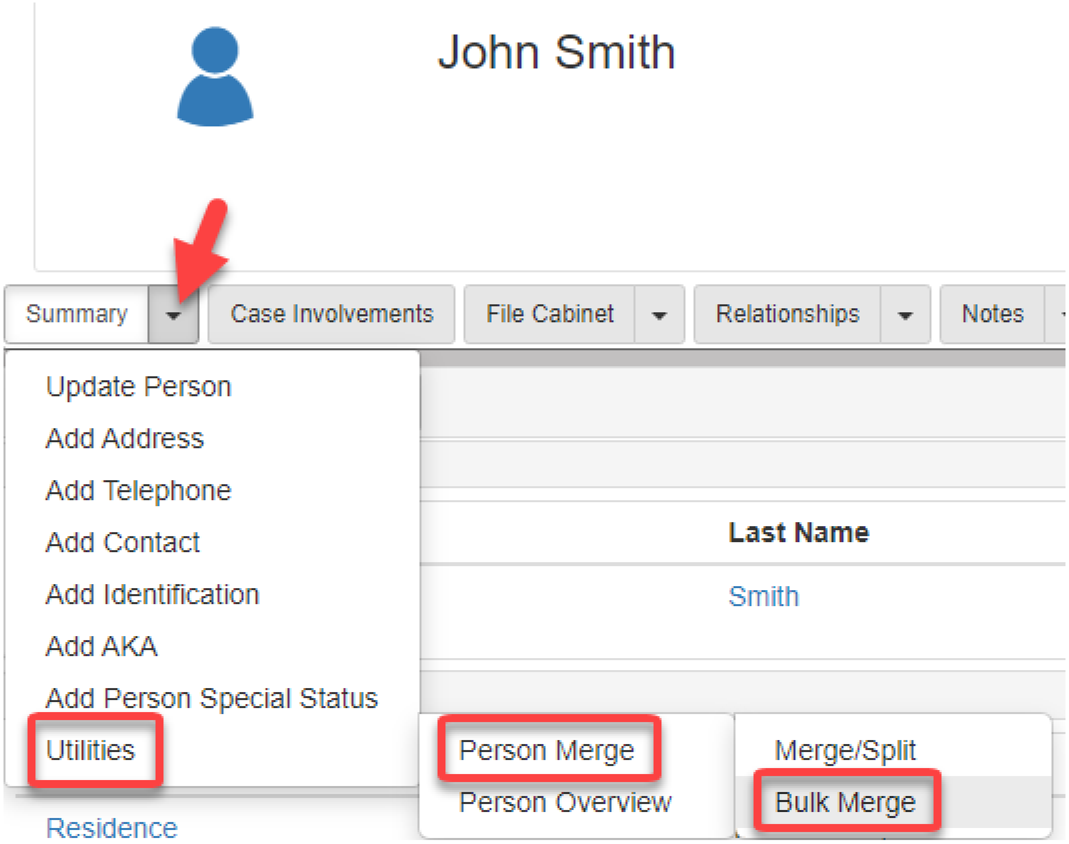
18. PERSONS INVOLVED	ID CODE (a)	NAME AND ADDRESS (b)	AGE (c)	SEX (d)	RACE (e)	INJURY CODE (f)	TELEPHONE (g)
		Last Name, First, Middle Initial					HOME
		Number, Street, Apt. No., City and State					BUSINESS
		Last Name, First, Middle Initial					HOME
		Number, Street, Apt. No., City and State					BUSINESS

Bulk merge

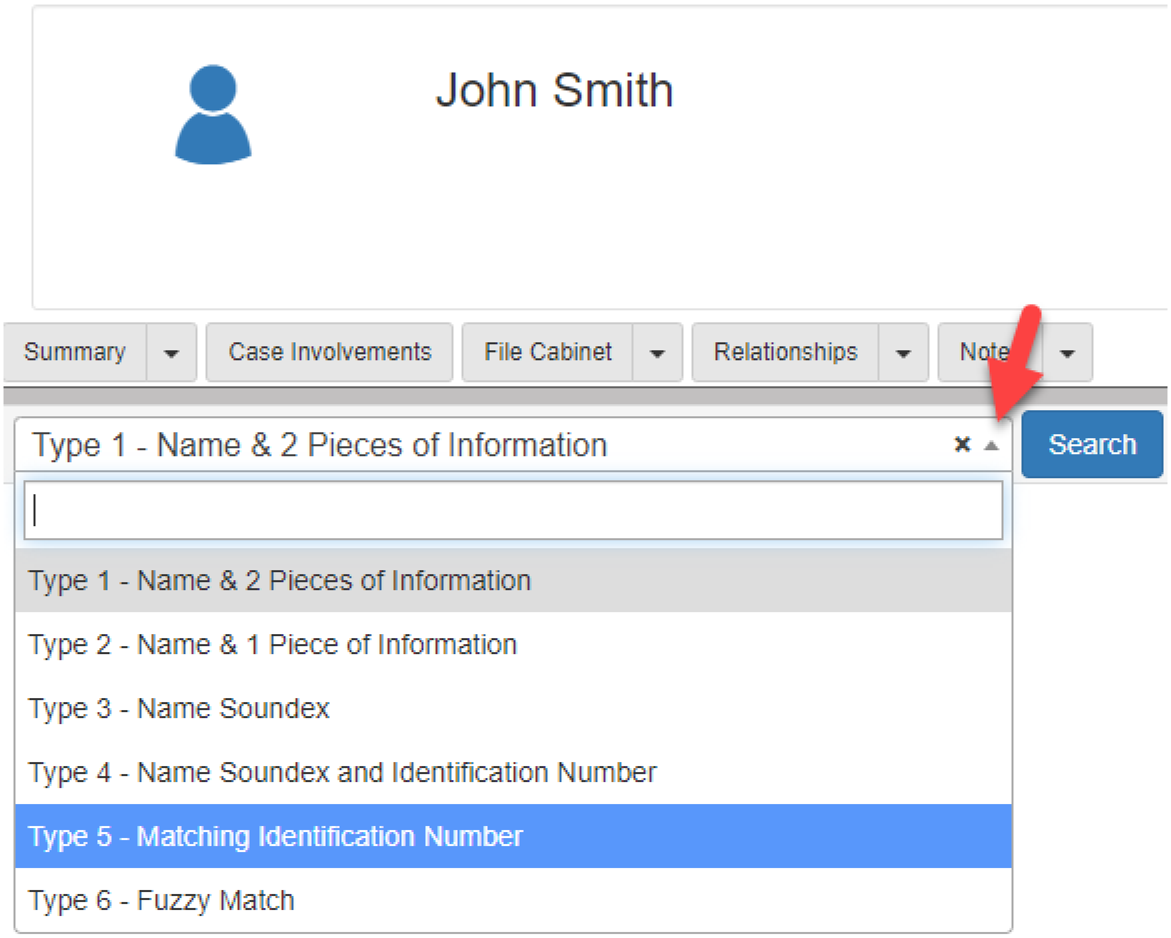
1. To start a bulk merge, go to the person summary view by clicking the **Open Person View** icon:



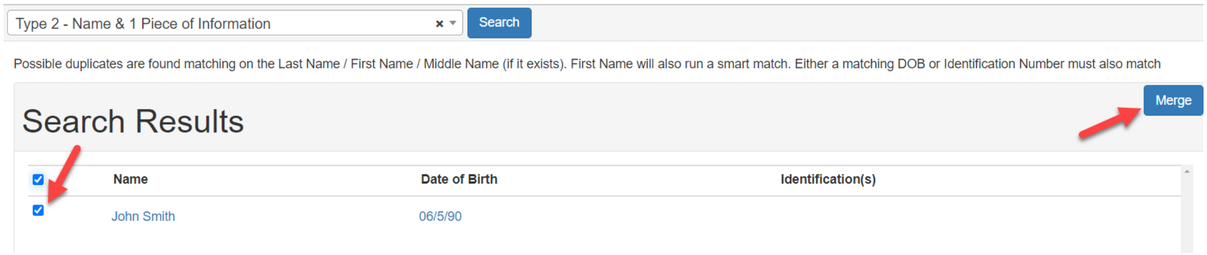
2. Click the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, then select **Bulk Merge**:



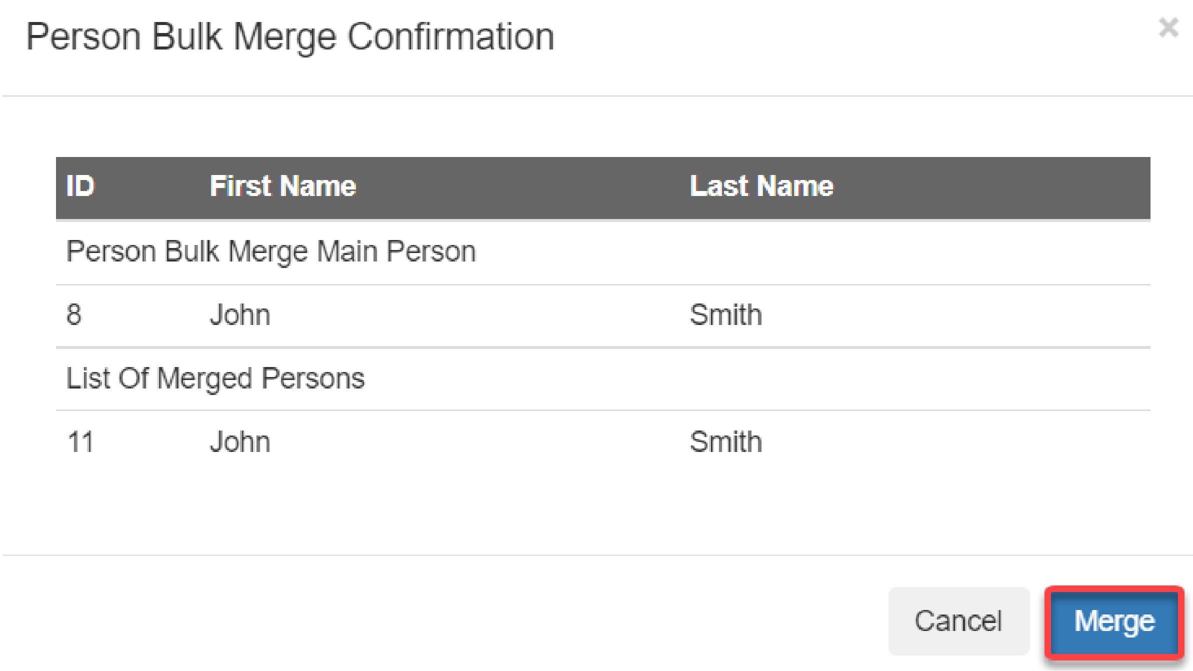
3. In the **Bulk Merge** search dropdown, select the search to execute:



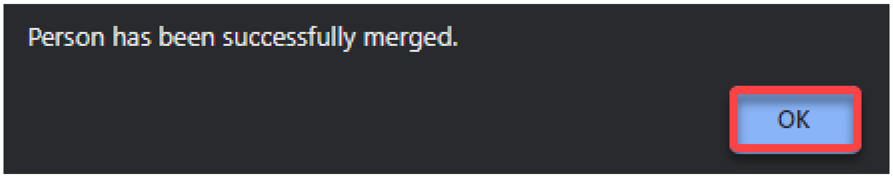
4. On the **Bulk Merge** search screen, select the checkbox next to the person record that needs to merge with the current person record.
5. Click **[Merge]**:



6. The **Person Bulk Merge Confirmation** pop-up shows. Click **[Merge]**.



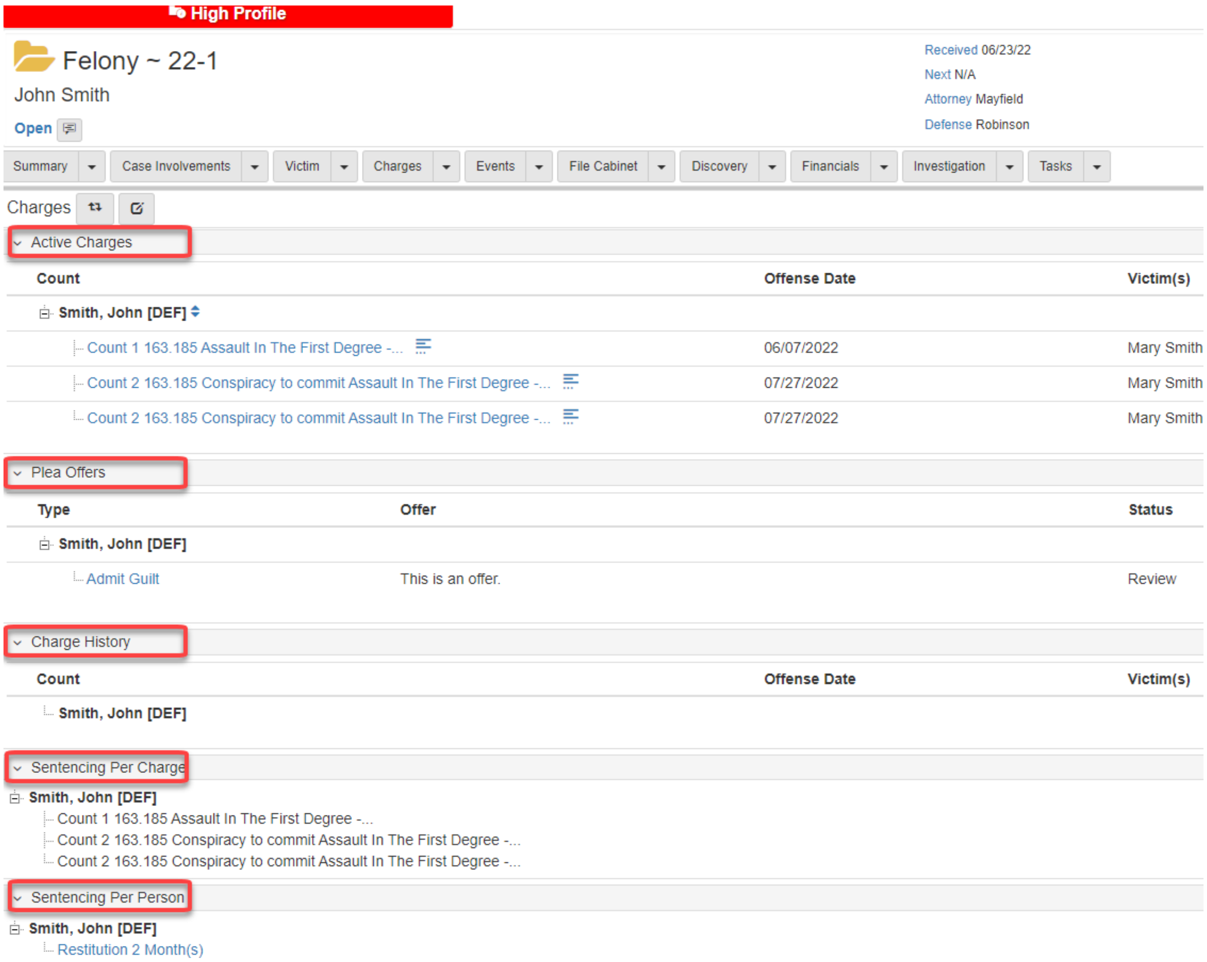
7. The following message shows: `Person has been successfully merged.`. Click **[OK]**.



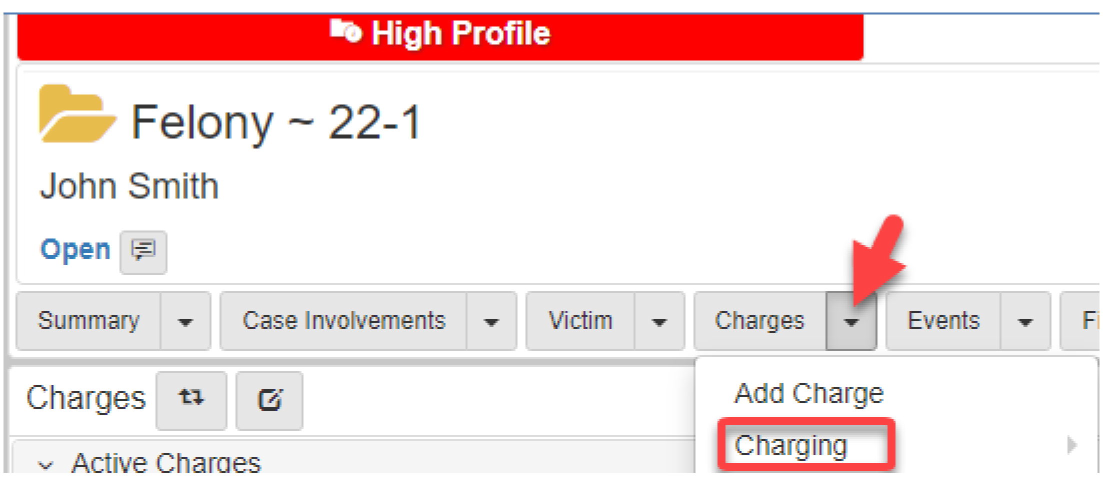
Charging

Charges folder view

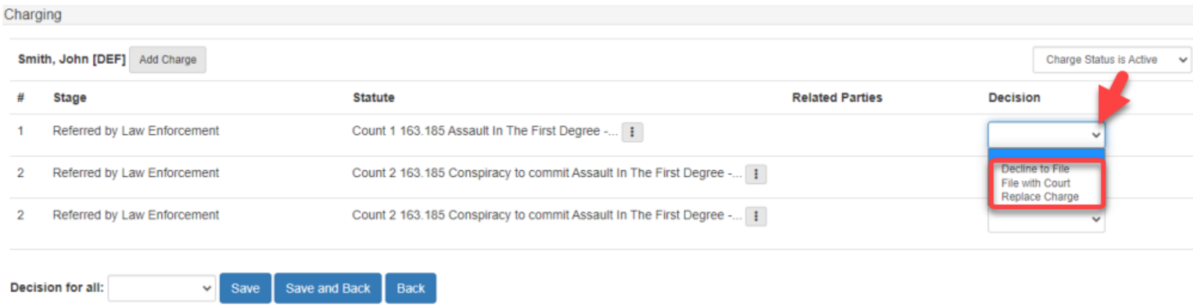
1. The Charges folder view displays active charges, plea offers, sentencing and charge history:



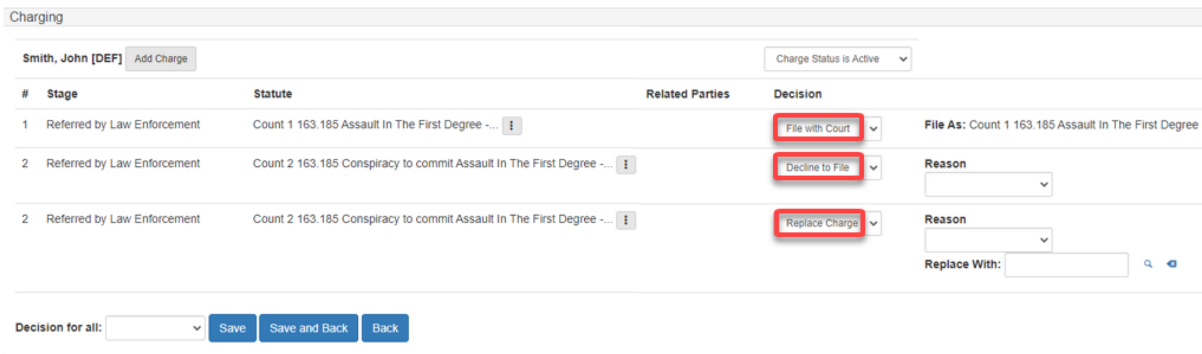
2. In the **Charges folder View**, click the dropdown and select **Charging**:



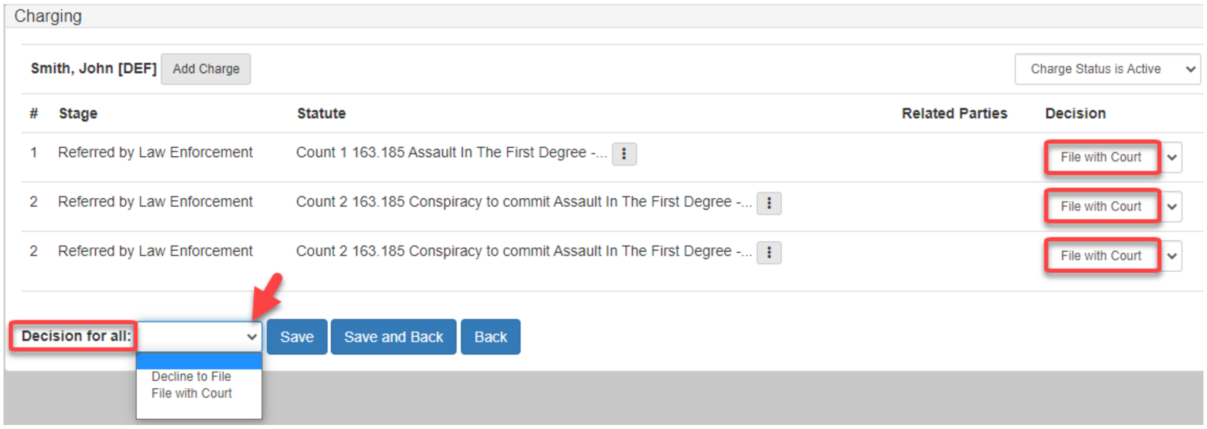
3. The **Charging** widget shows, where the charge decision can be selected: **Decline to File**, **File with Court**, or **Replace Charge**:



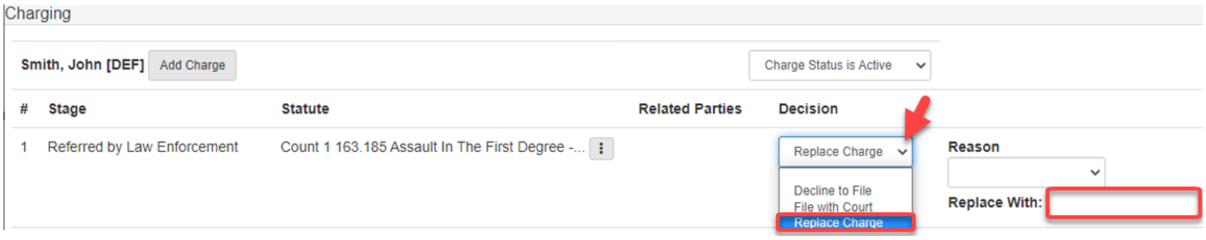
4. You can make different Decisions on the requested Charges:



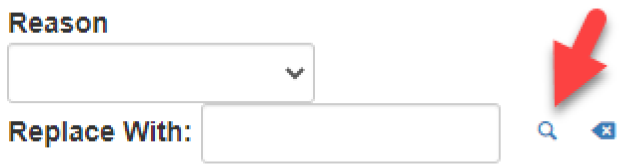
5. If the Decision is the same for all requested Charges, you can add the decision to all by selecting the Decision from the Decision for all dropdown:



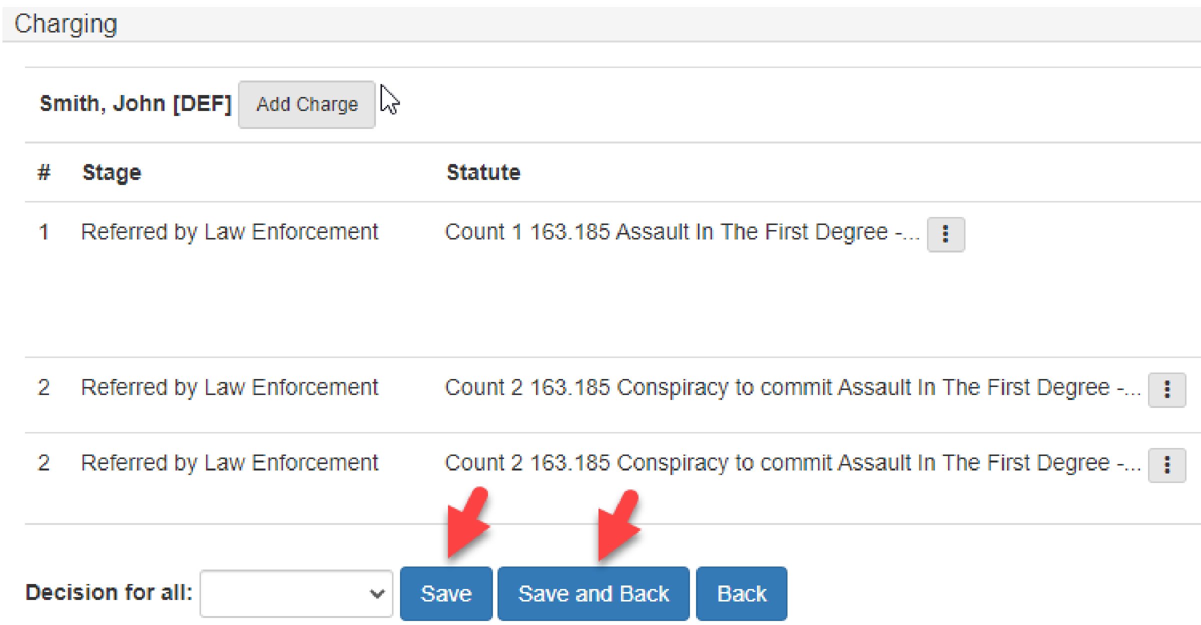
6. You can also Replace a charge and select a new charge from the search option provided on the Replace with field:



- You can start typing the name of the statute, or click the magnifying glass, to find the new charge:

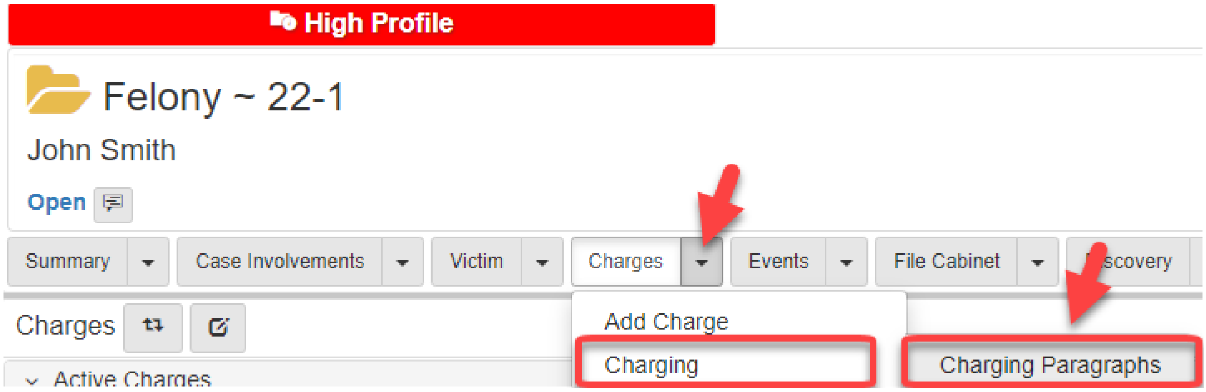


7. Once you have completed the Charging decision, click **[Save]** or **[Save and Back]**. The **Charges Folder View** shows the active charges and **Charge History**:

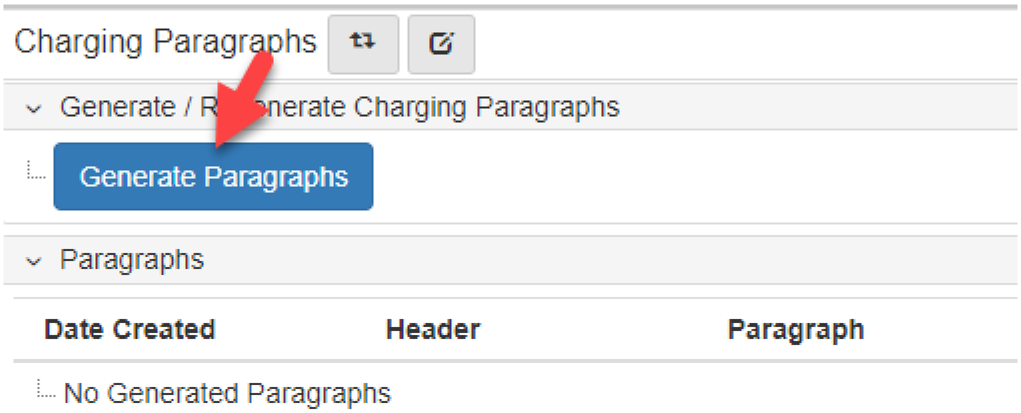


Generate charging paragraphs

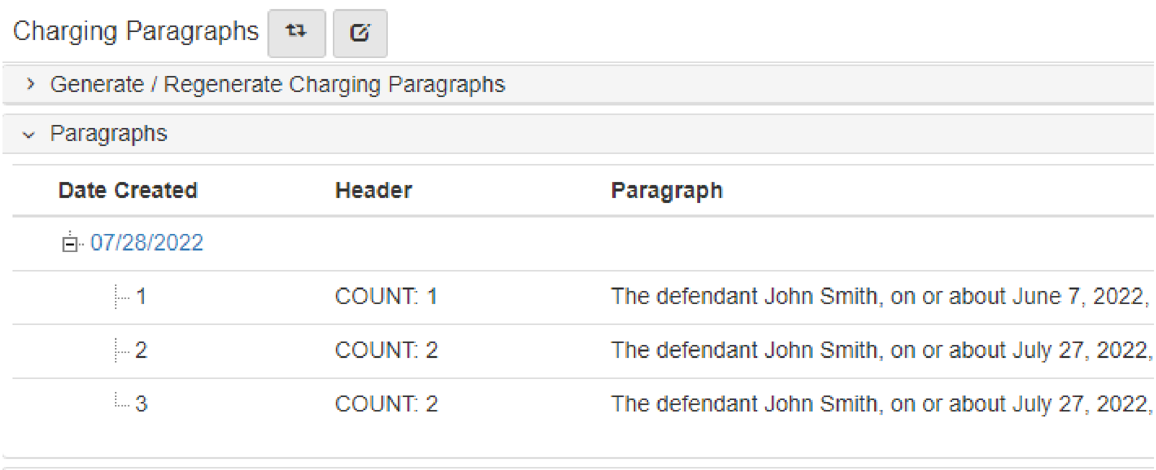
1. To generate the Charging Paragraphs, from the Charges folder view, click the dropdown menu, hover over Charging, and click **[Charging Paragraphs]**:



2. In the **Charging Paragraphs Folder View**, click **[Generate Paragraphs]**:

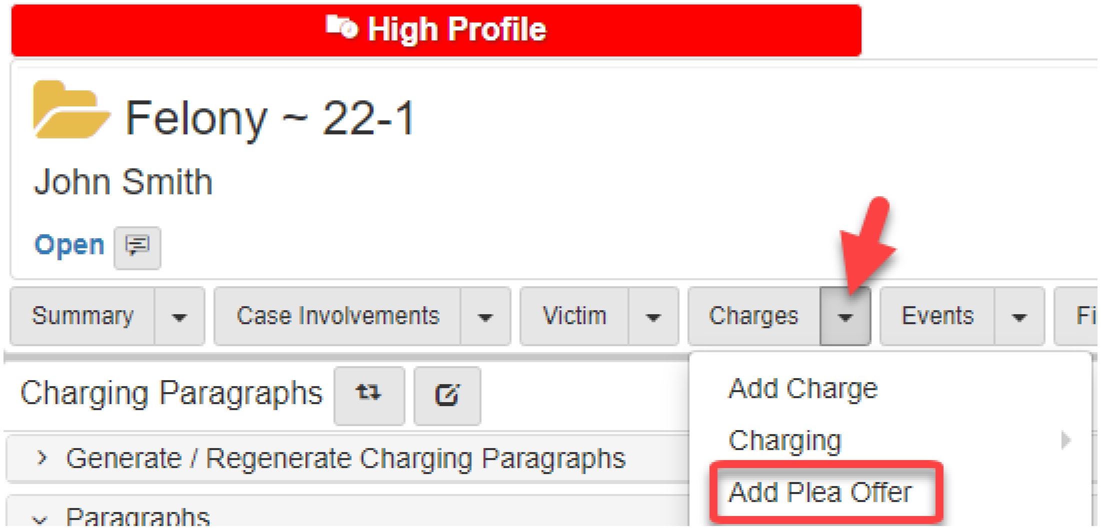


- Charging Paragraphs:

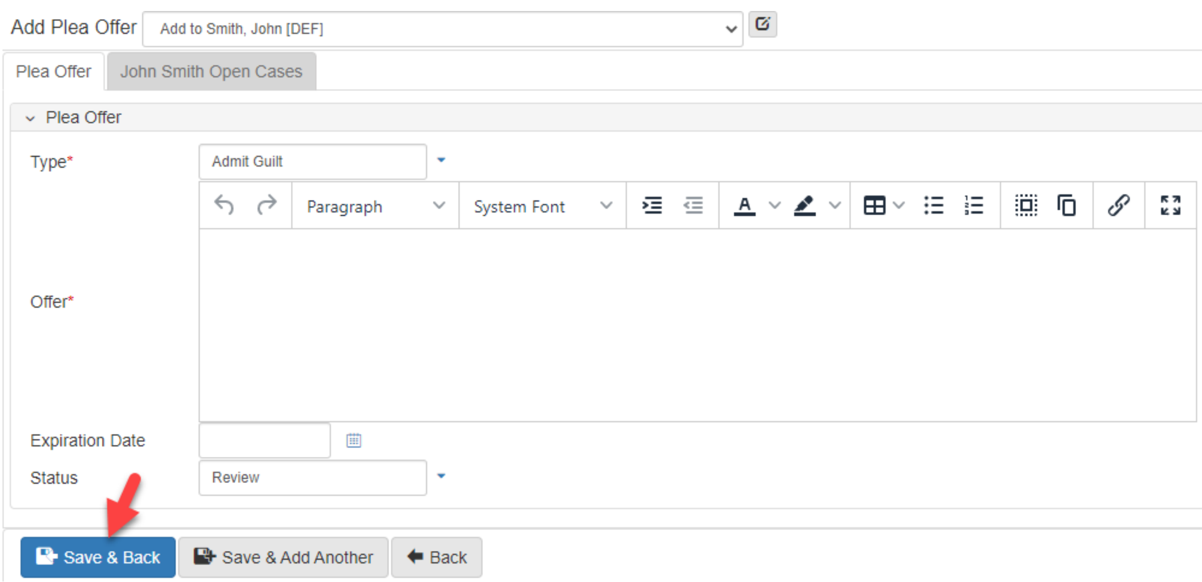


Plea offer

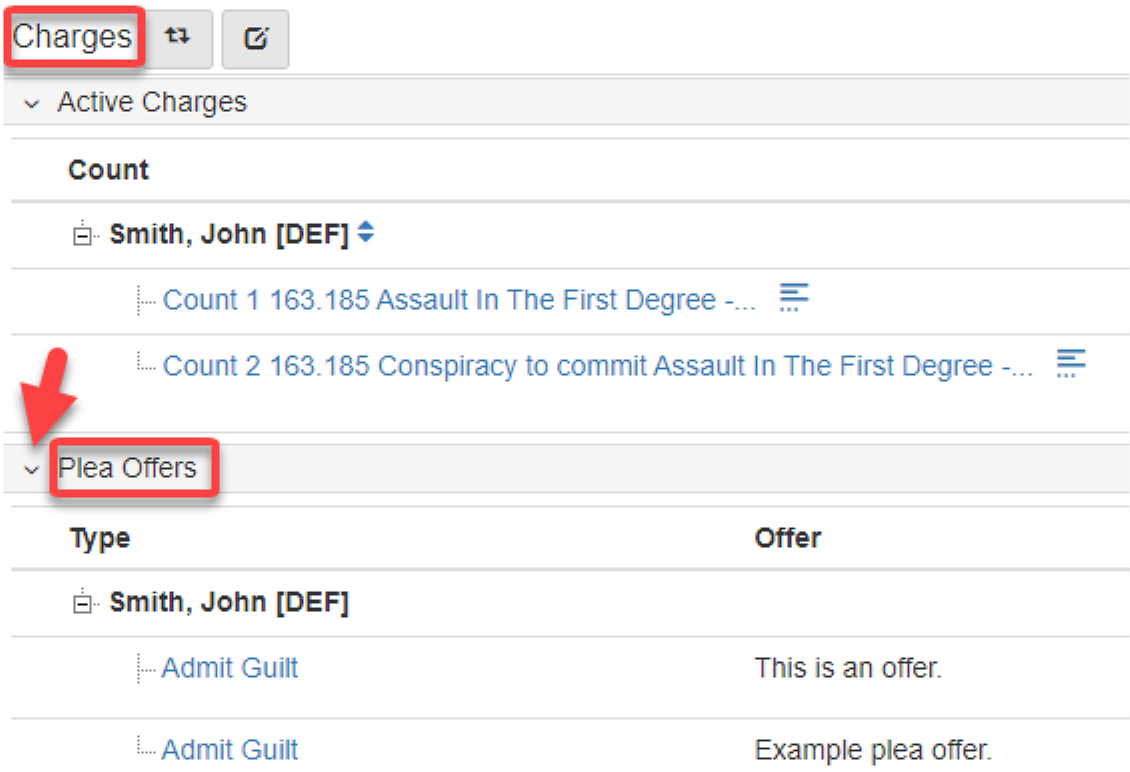
1. To add a Plea Offer, from the Charges folder view, click the dropdown menu, and click **[Add Plea Offer]**:



2. The Add Plea Offer form shows. Once the form is filled, click **[Save & Back]**:

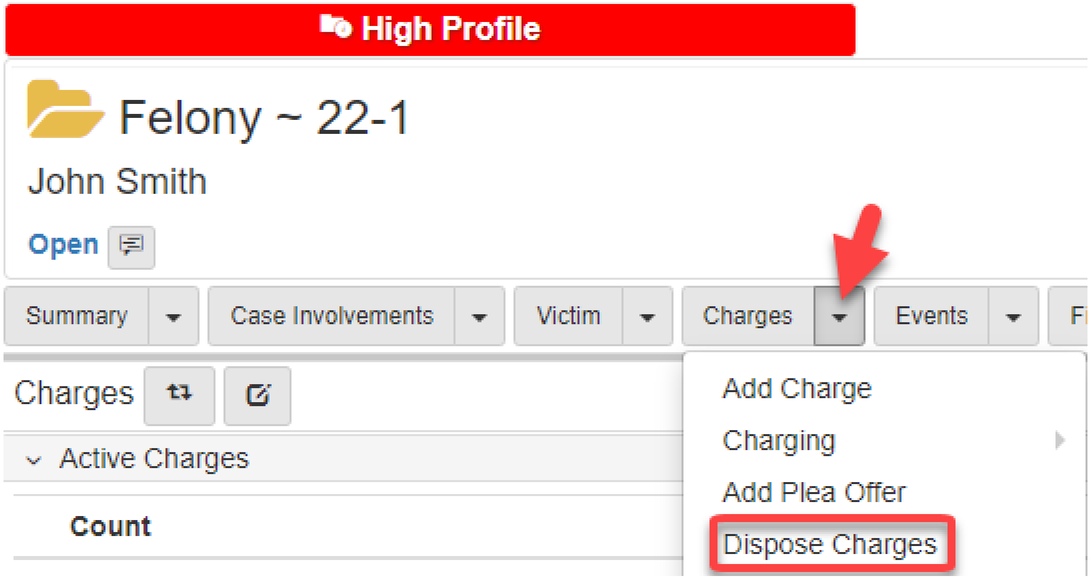


3. The Plea Offer shows in the Plea Offers panel in the Charging folder view:

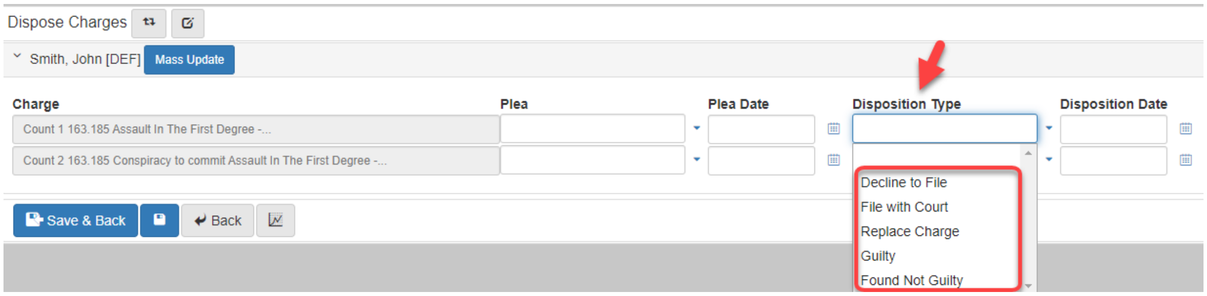


Disposing charges

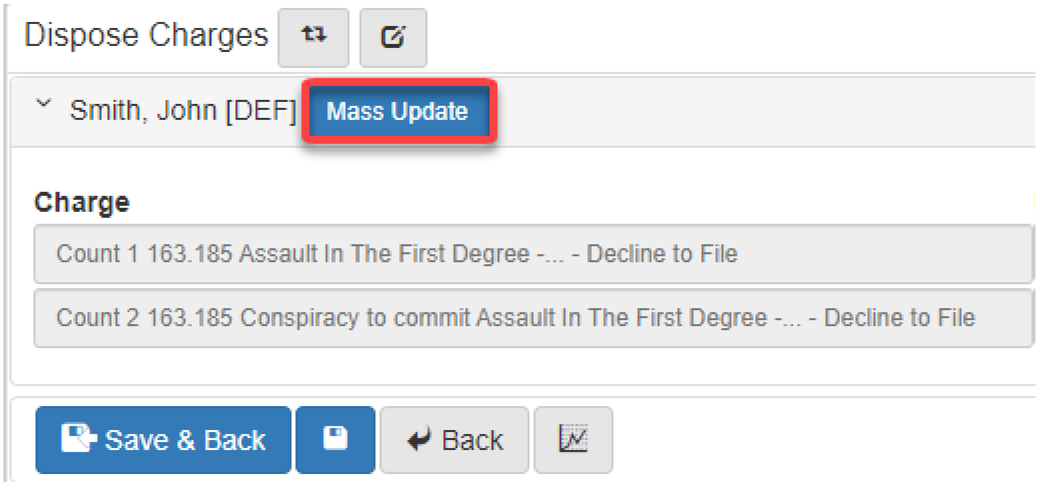
1. To dispose charges, from the Charges folder view, click the dropdown menu and click **[Dispose Charges]**:



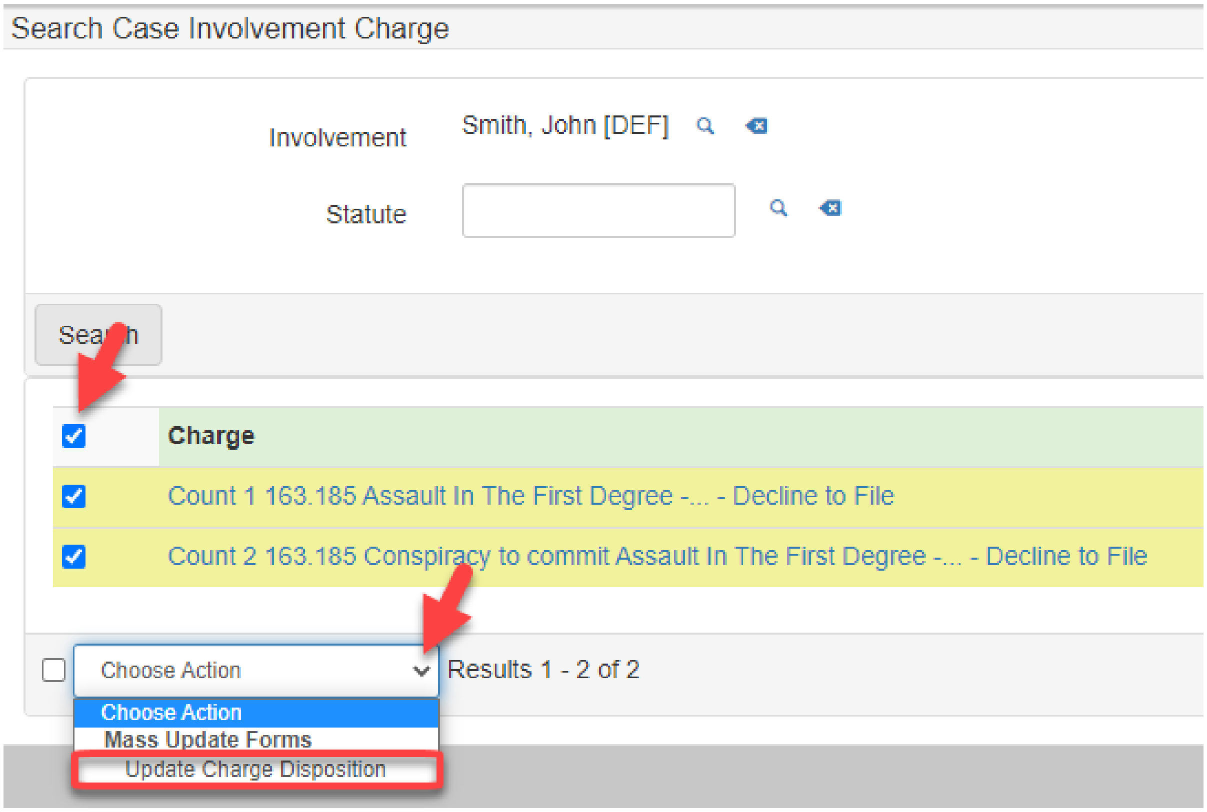
2. The Dispose Charges form, where different dispositions can be added to each charge, shows:



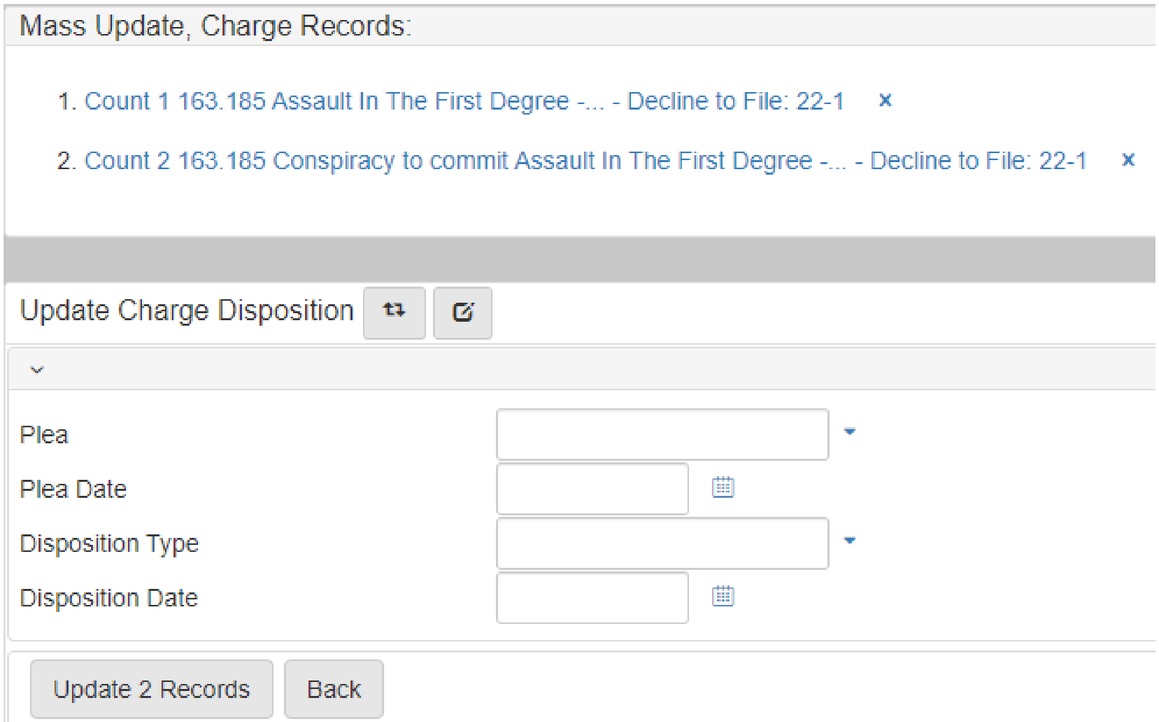
3. You can add the same disposition to all charges by clicking the **[Mass Update]** button:



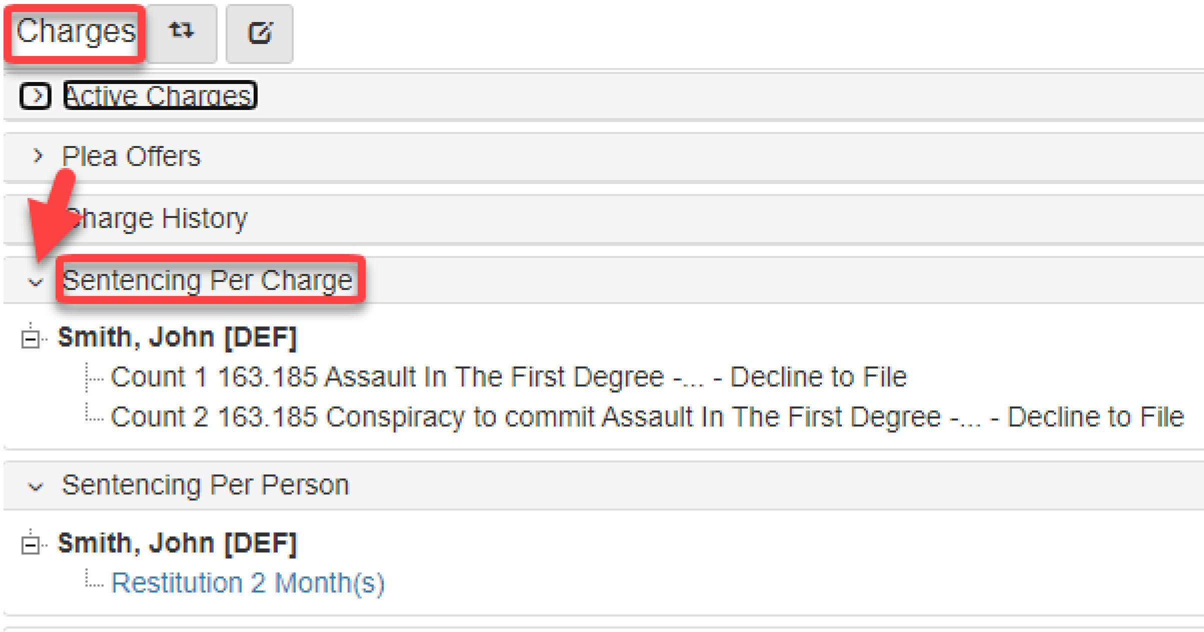
4. Click some or all of the charges that have the same disposition type and select Update Charge Disposition from the Choose Action menu.
5. If all charges have the same disposition, you can select the checkbox in the column header:



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:

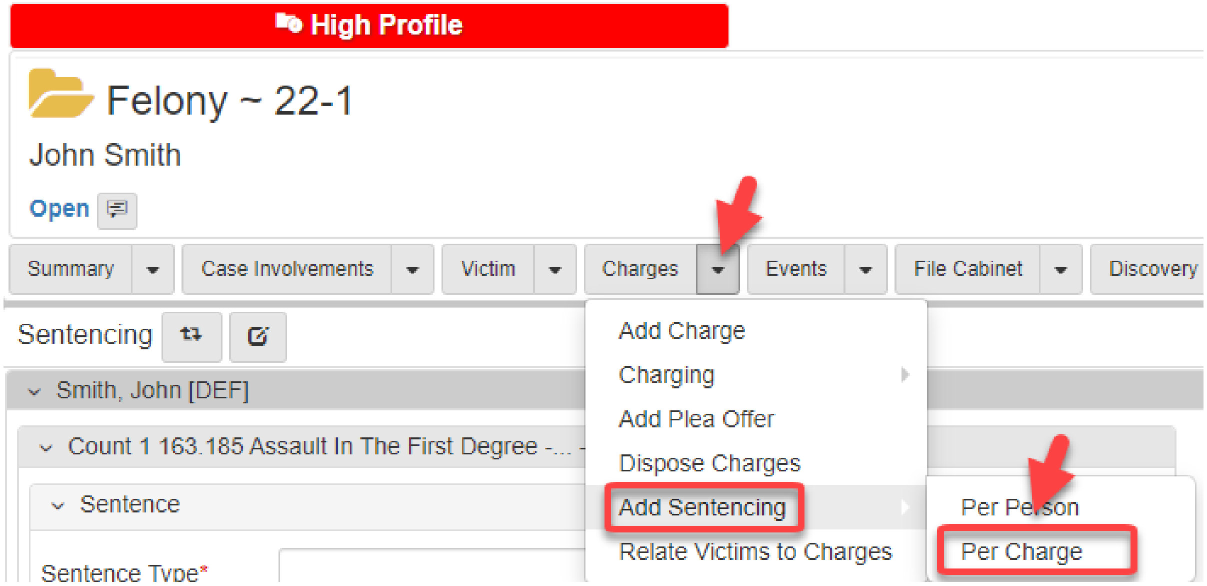


7. The Charges and corresponding Dispositions show in the Sentencing panel of the Charges folder view:

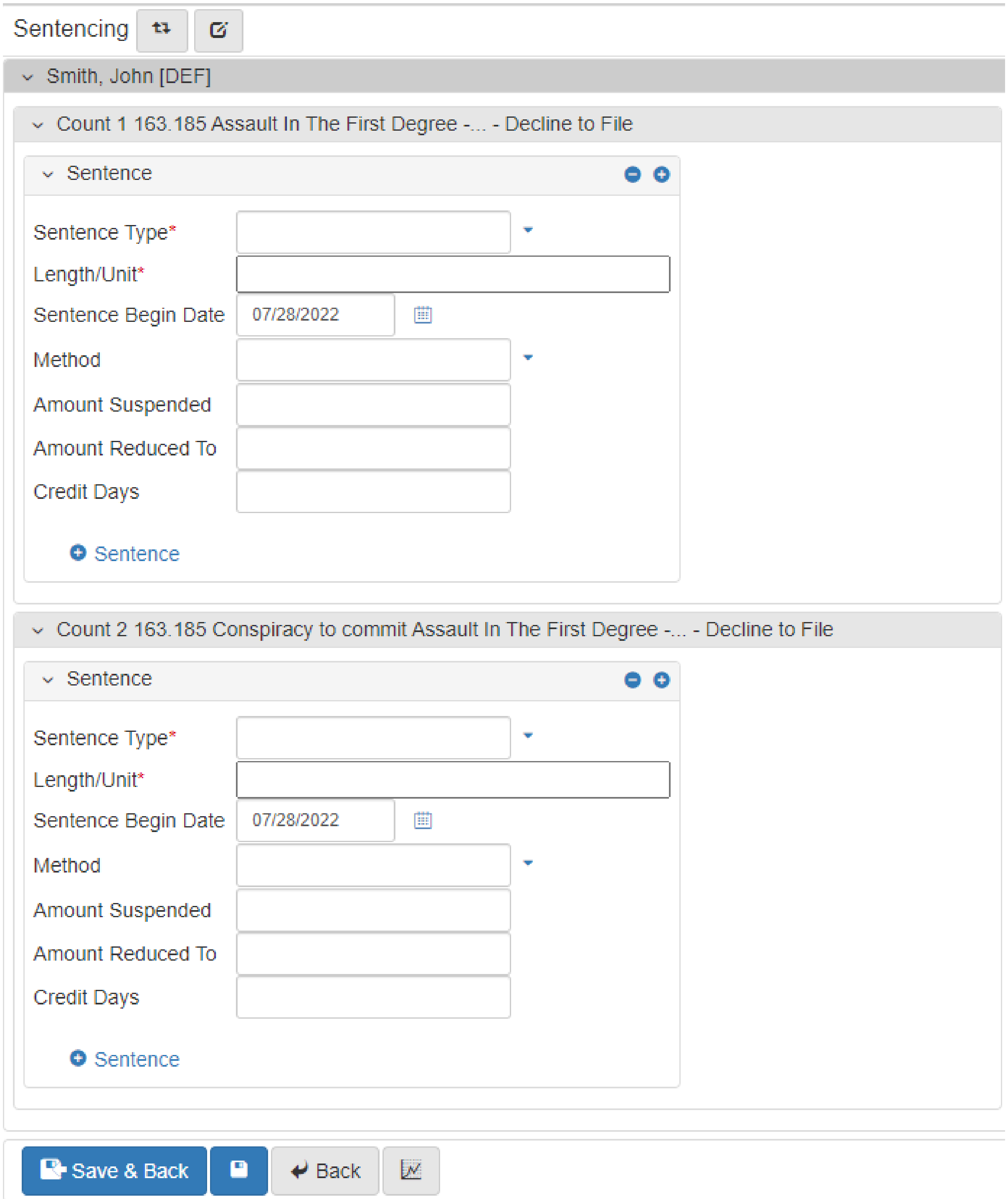


Sentencing

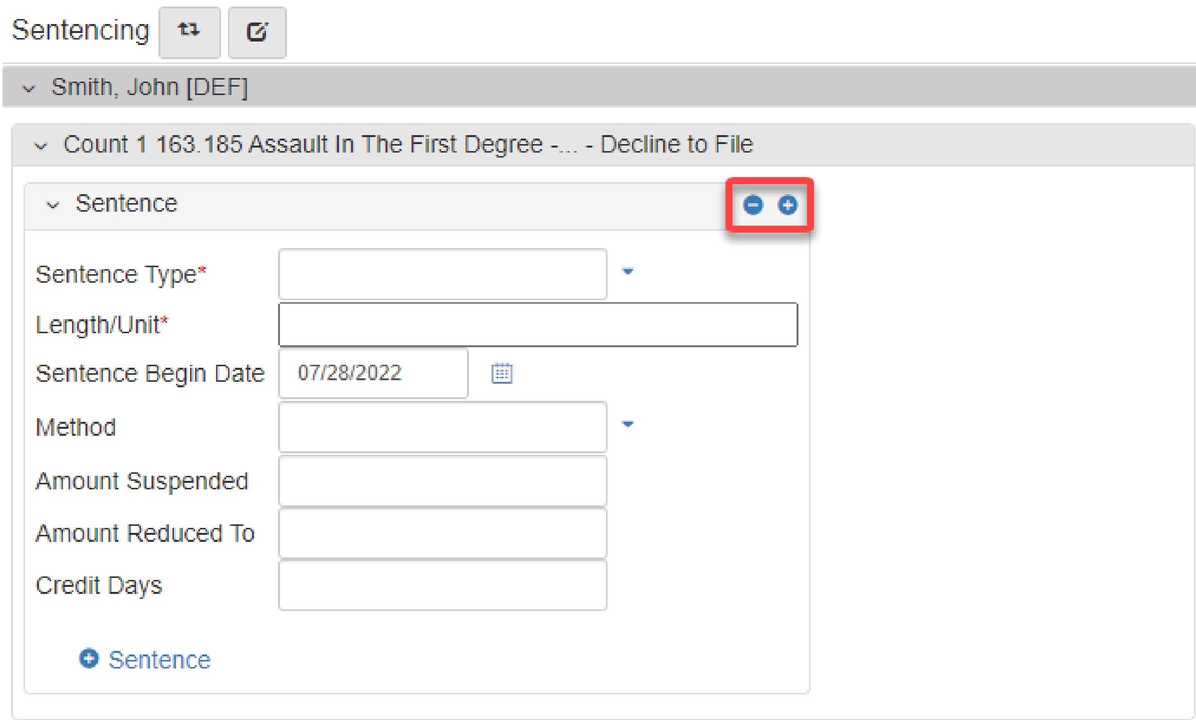
1. To add Sentencing information, from the Charges folder view, click the dropdown menu, hover over Add Sentencing, and click **[Per Charge]**.



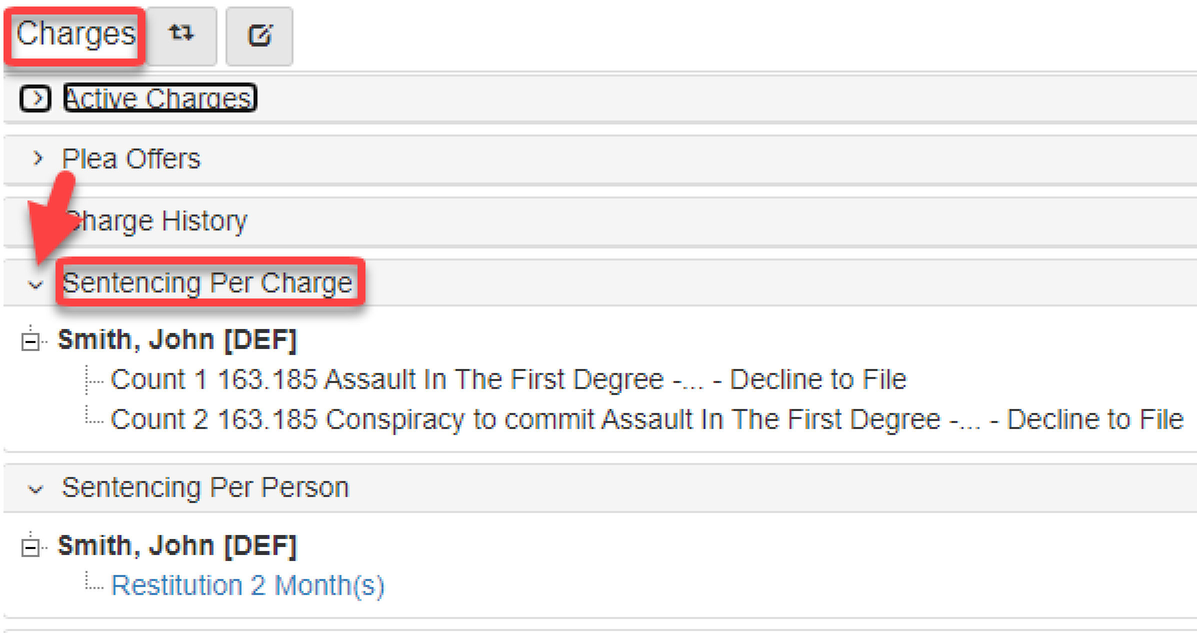
2. The Sentencing form, where sentencing can be added per charge, shows:



3. 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 **[-]**.



4. The Charges and corresponding Sentencing shows in the Sentencing panel of the Charges folder view:

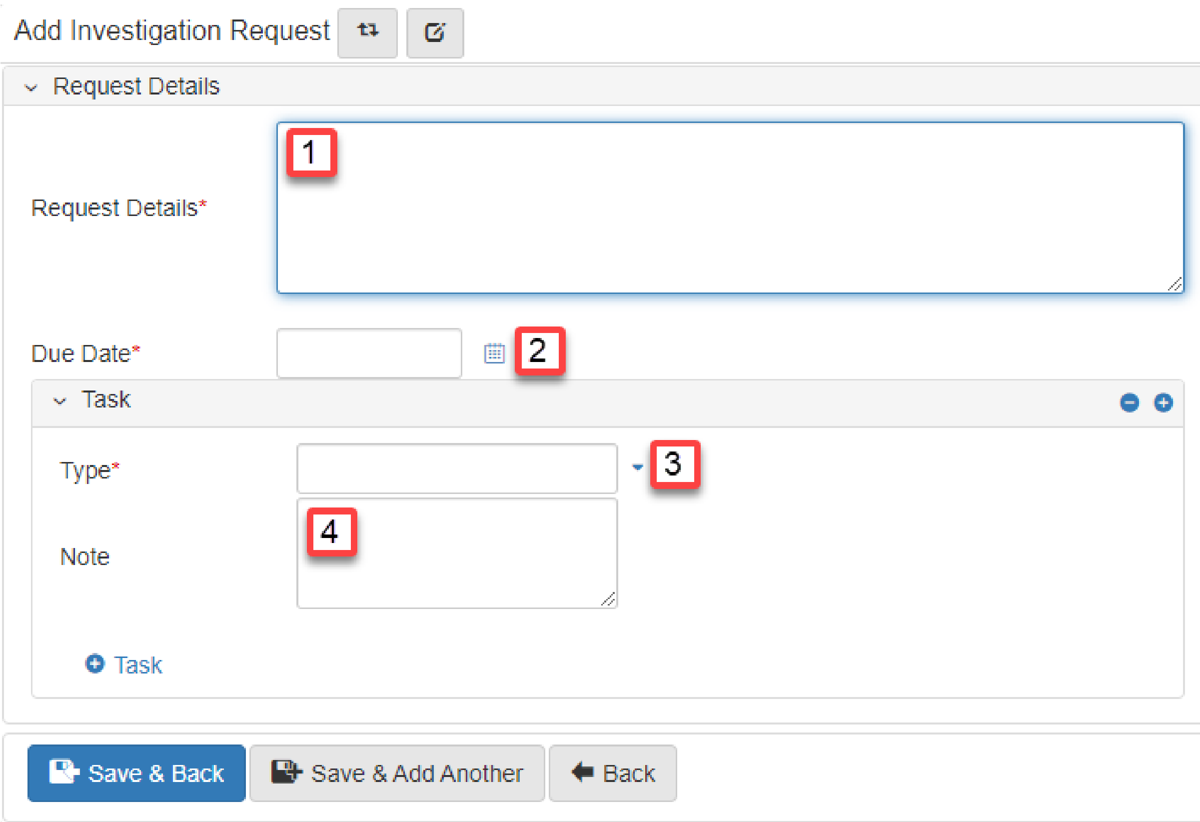


Investigation requests

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]**:

2. Click the **Request Details** text box and add details:



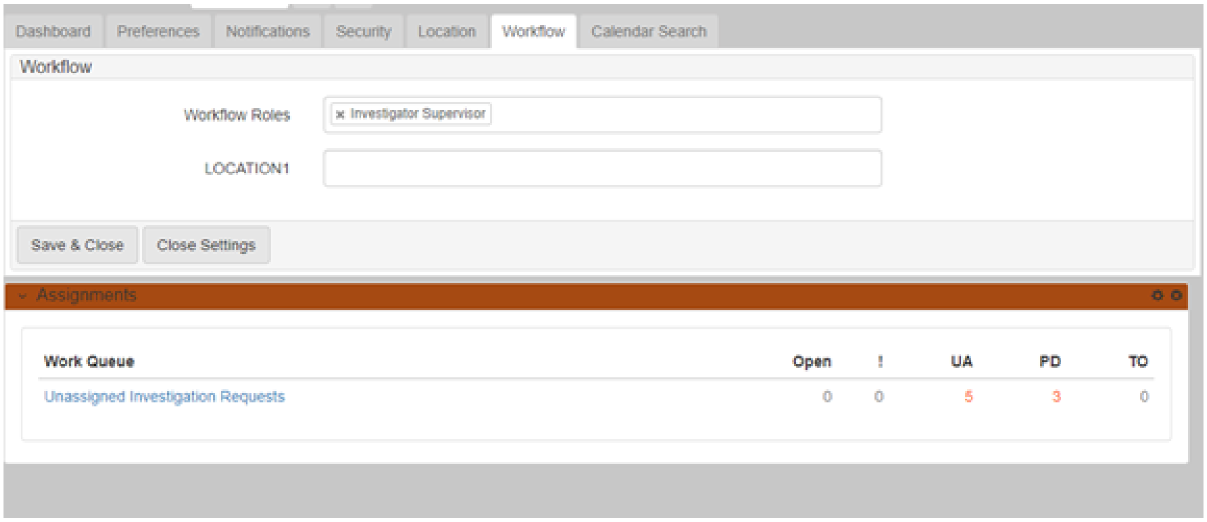
3. Click the date icon and choose the date.
4. In the Task pane, select the type of task from the drop down arrow.
5. In the Task pane, add a note.

Unassigned investigation requests

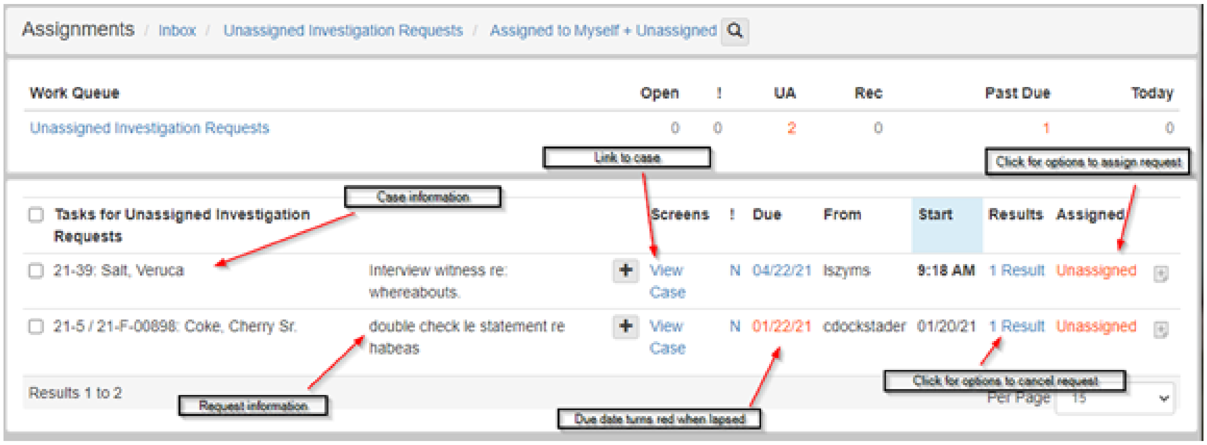
1. When an investigation request (caseResearchRecord) is added to the case:

- 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:

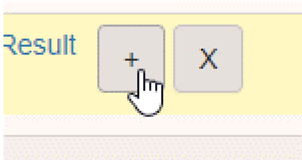


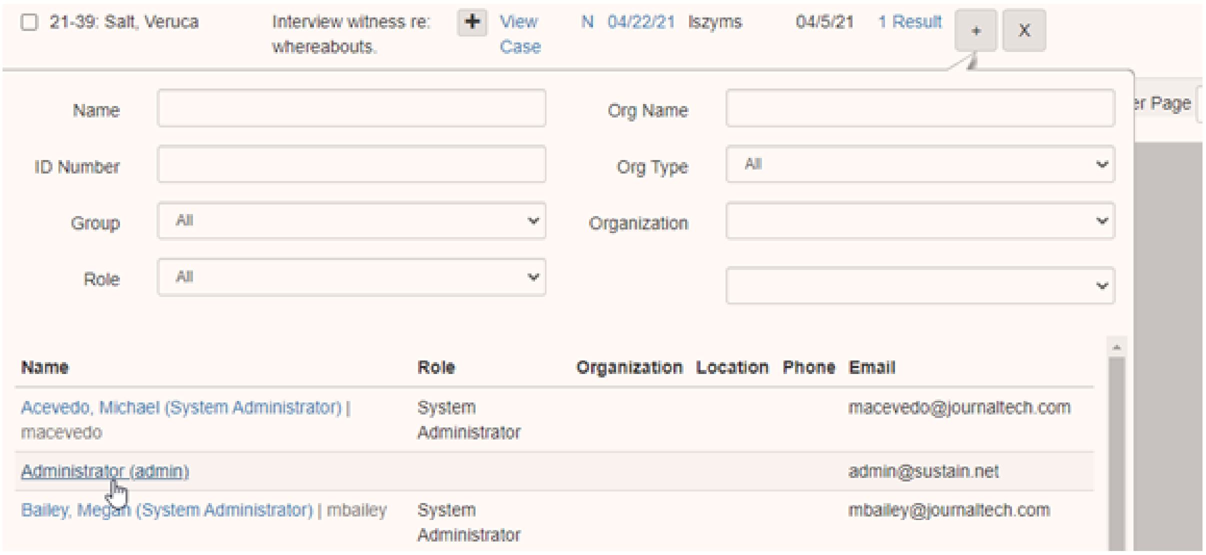
2. Click the work queue to view the list of unassigned investigation requests:



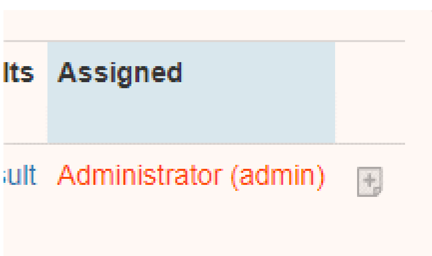
3. Assigns the Investigation request by clicking the red `Unassigned` under the Assigned column:

4. Click `[+]` to navigate into a directory search where you can choose the request assignee:

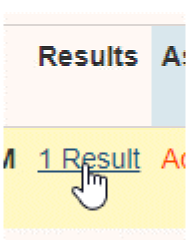




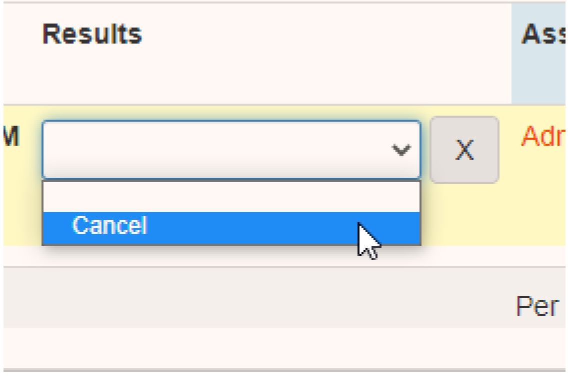
5. The chosen assignee is listed in red under the Assigned column. The action of assigning the request closes out the workflow. This work queue drops off the queue on screen refresh:



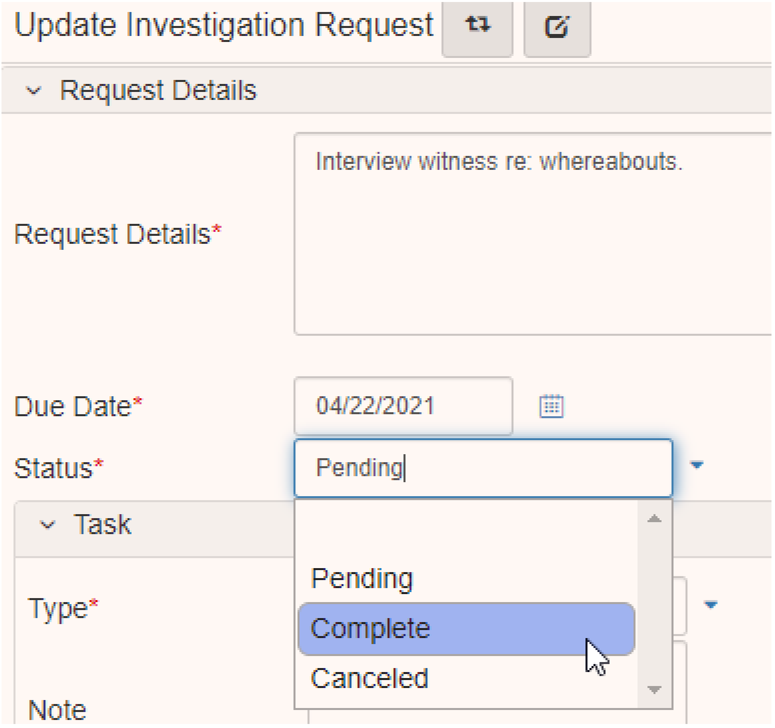
6. You can cancel the investigation request by clicking the results and choosing `Cancel` from the drop down:



7. This action also closes out the workflow and the work queue drops off the queue on refresh:

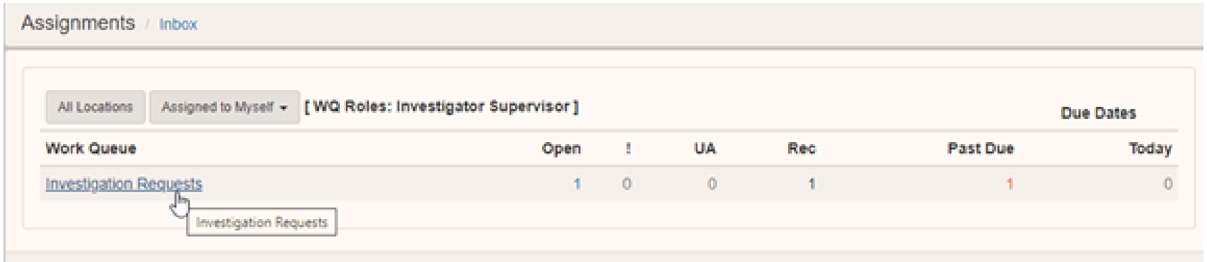


The workflow is also closed out when the status is manually changed to `Completed` or `Canceled` inside the Update Investigation Request form.

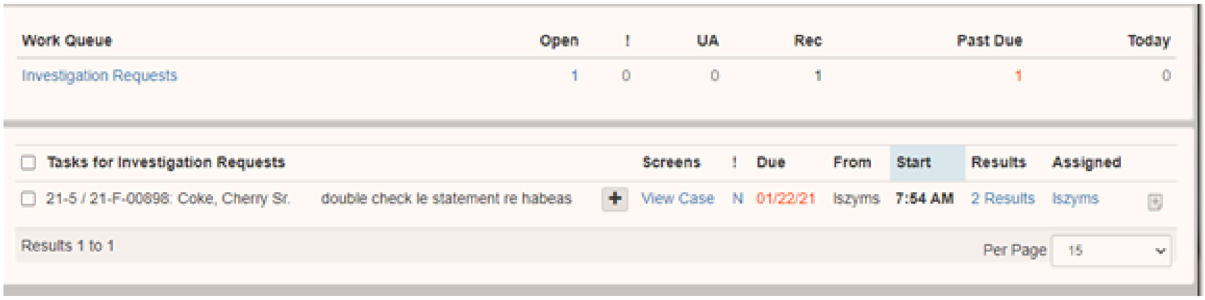


Assigned investigation requests

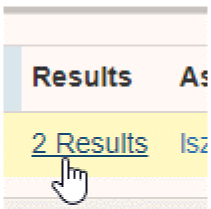
1. Once an assignee is set on an Investigation Request, a work queue called `Investigation Requests` is assigned to the request assignee:

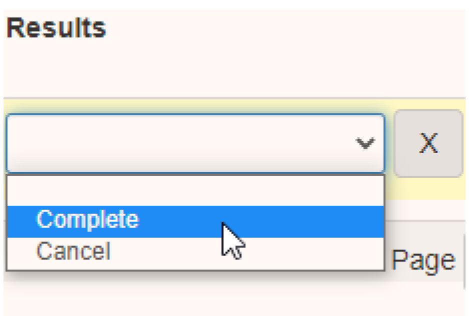


2. Clicks the work queue to view the list of unassigned investigation requests.



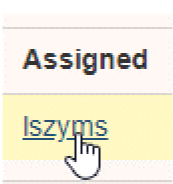
3. When the request is complete, click the results and select **Complete** in the dropdown:



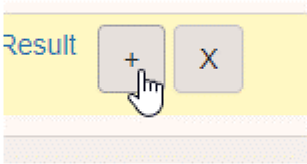


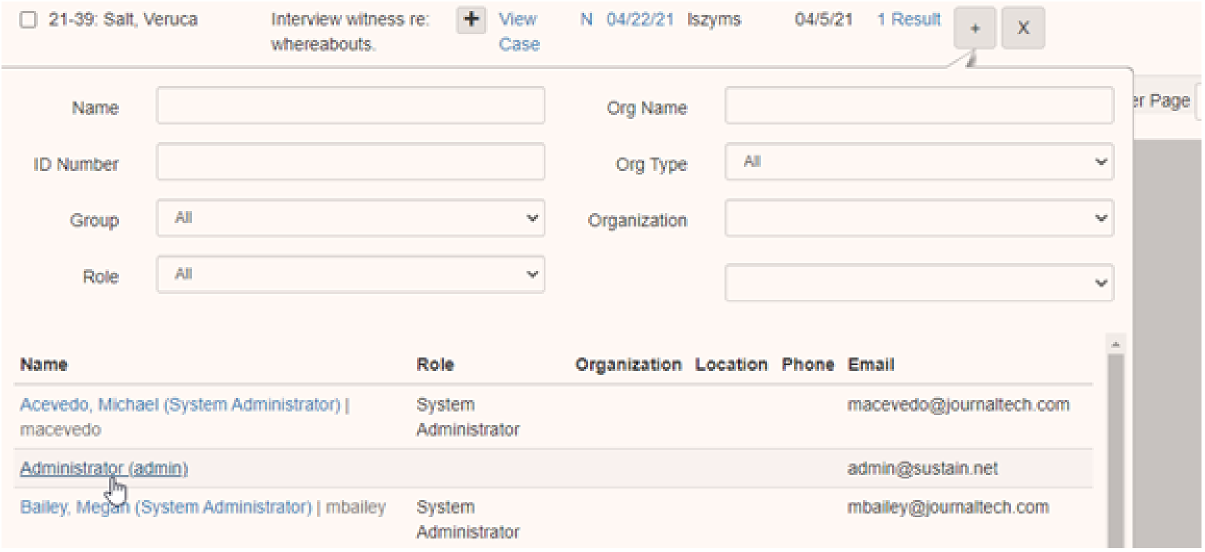
This changes the status of the request to completed and closes out the workflow. The work queue drops off the queue on refresh.

4. You can reassign the request by clicking your username in the `Assigned` column.

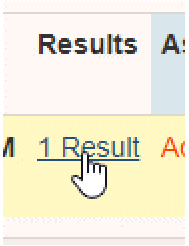


5. Click **[+]** to navigate into a directory search where you can choose the new request assignee:

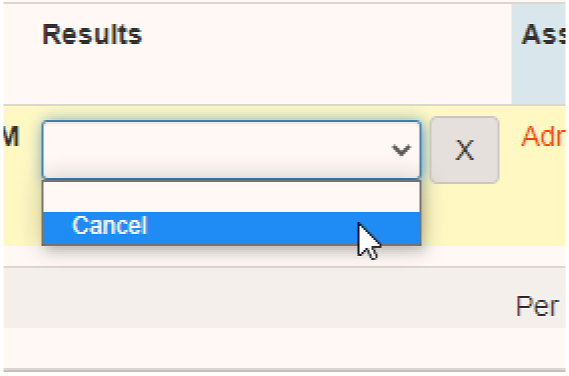




6. You can cancel the investigation request by clicking in the results:

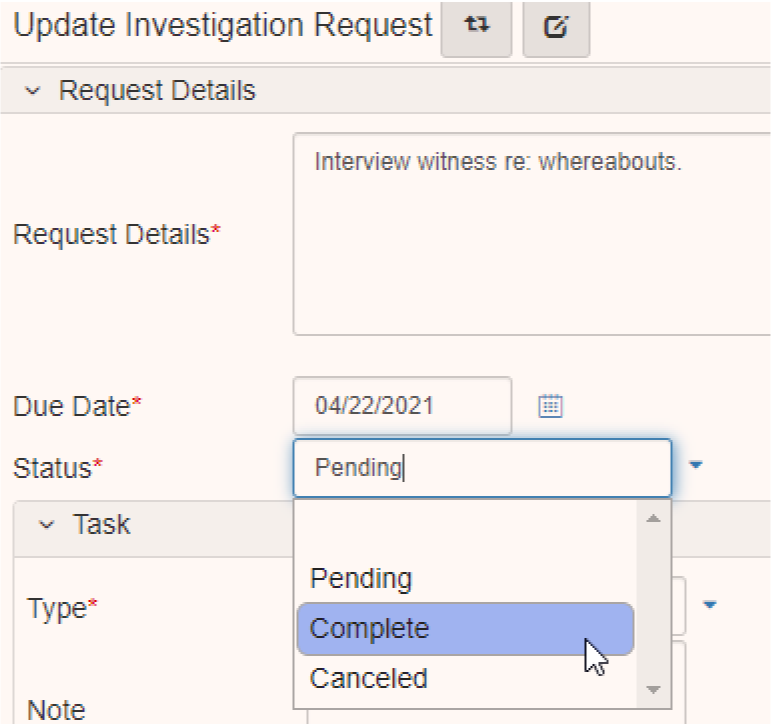


Then choose "Cancel" from the drop down.



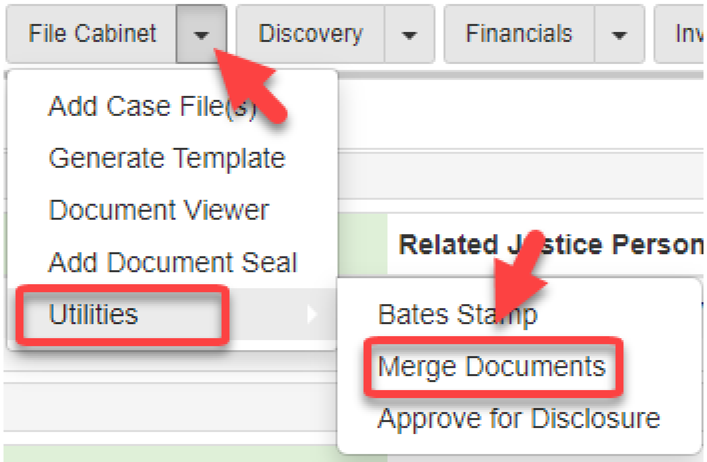
This action also closes out the workflow and the work queue drop offs the queue on refresh.

The workflow is also closed out then the status is manually changed to `Completed` or `Canceled` inside the Update Investigation Request form:

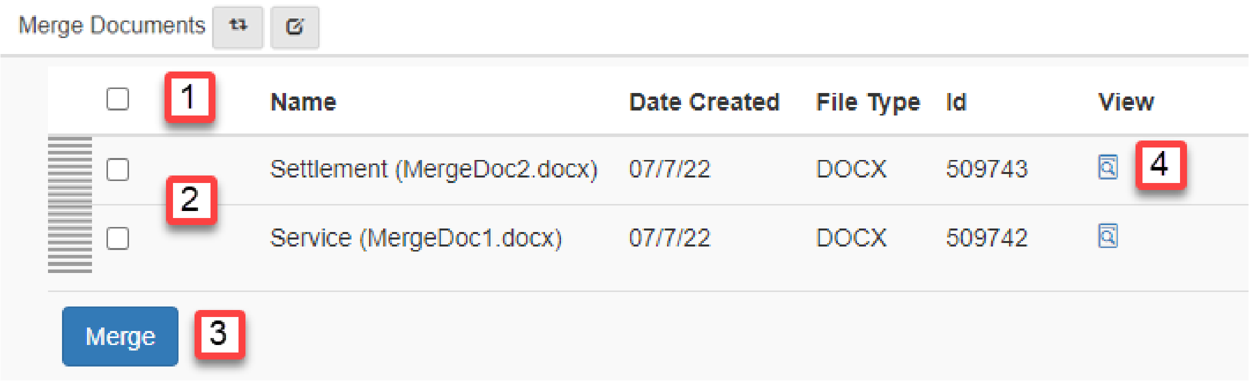


Merge documents

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**.

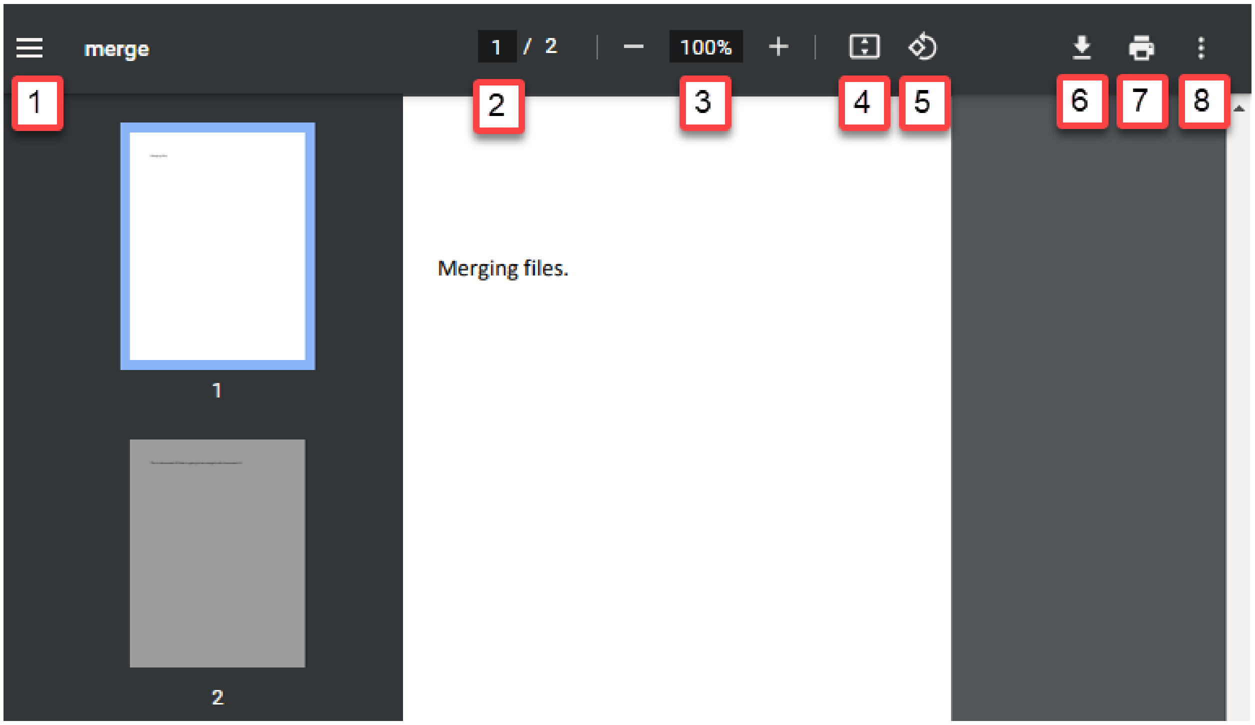


The **Merge Documents** screen shows:



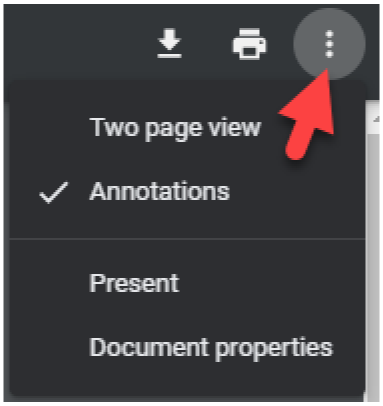
1. You can select all files.
2. Or you can select individual files.
3. Then click **[Merge]**.
4. You can also view your files with the **View Document** icon.

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:

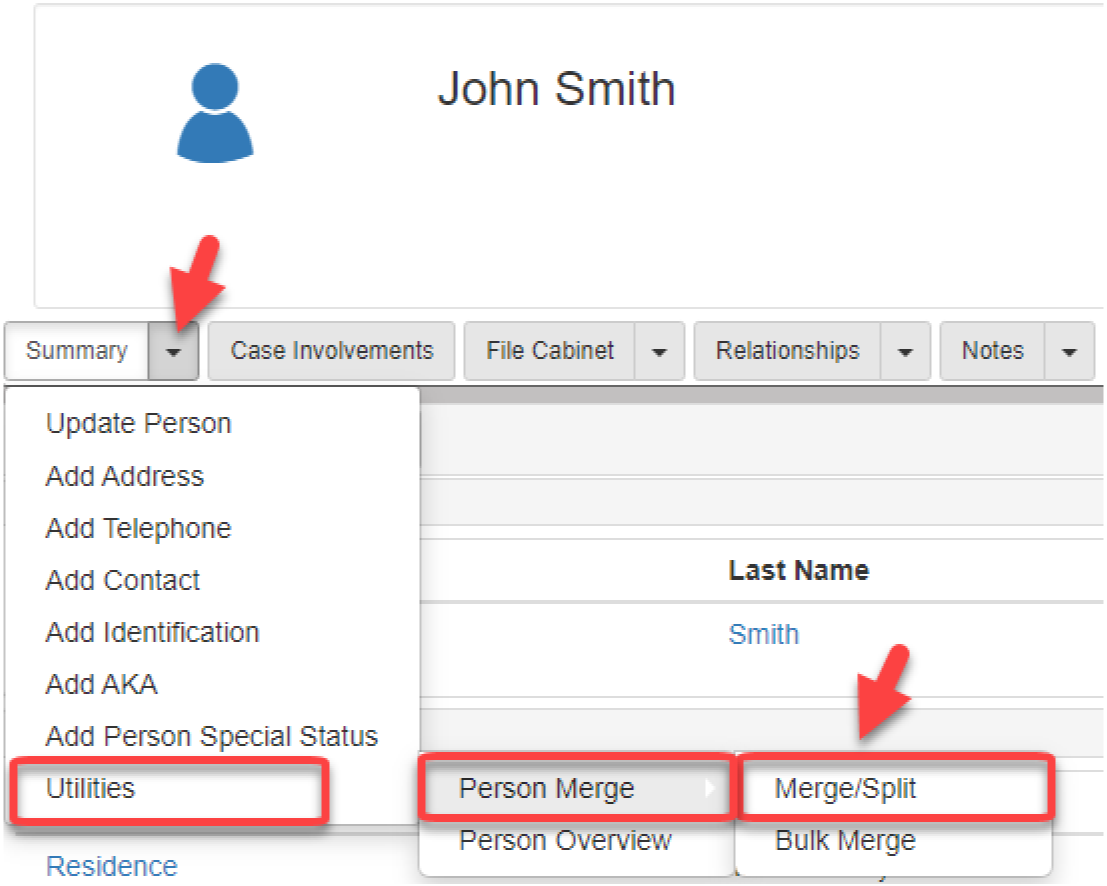


Person merge or split

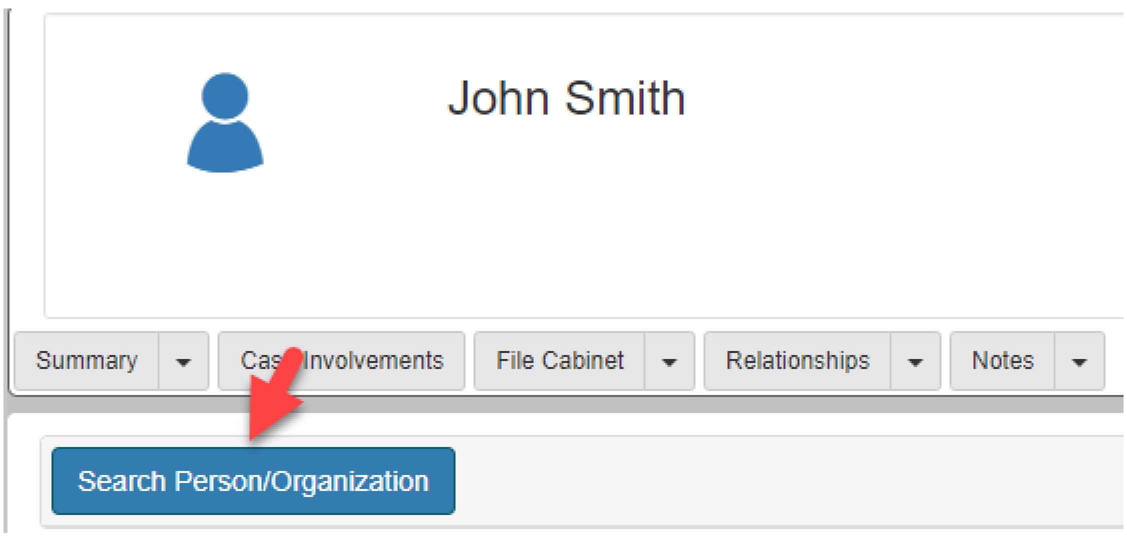
Person merge

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**:

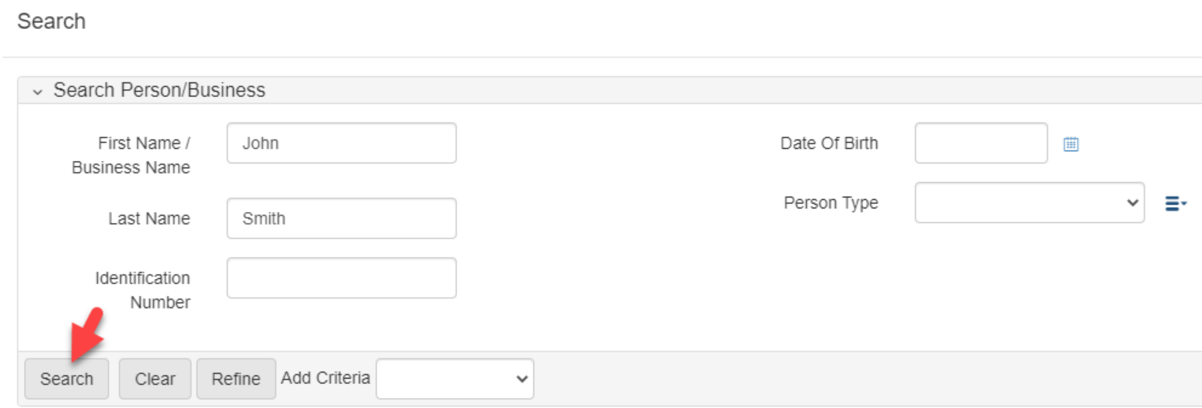


3. In the **Person Summary View**, click **[Search Person Organization]**:

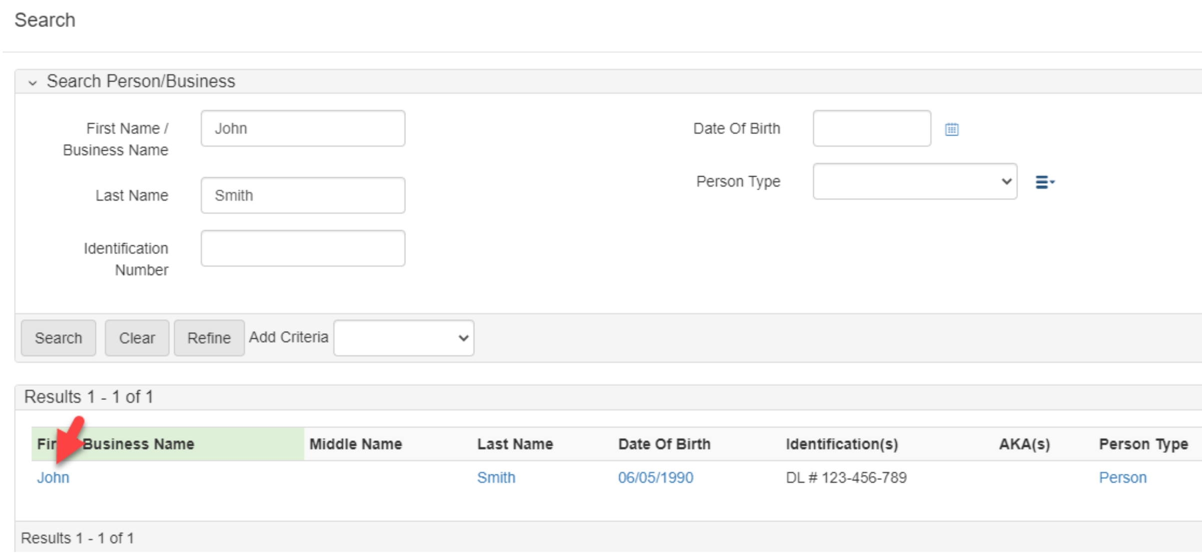


4. In the **Search Person/Business** screen, you can search on **First Name/Business Name**,

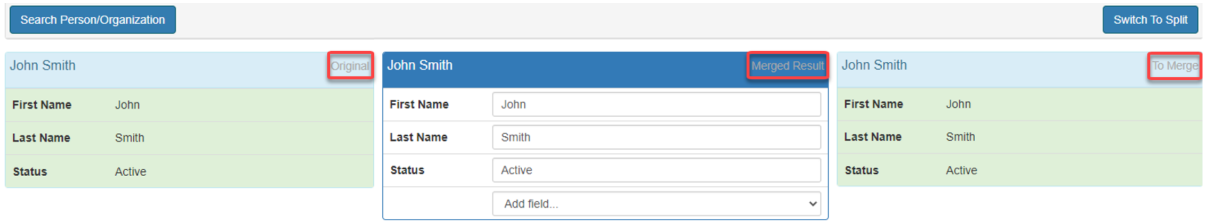
Last Name, **Identification Number**, **Date of Birth**, and **Person Type**. Enter your search criteria, then click **[Search]**:



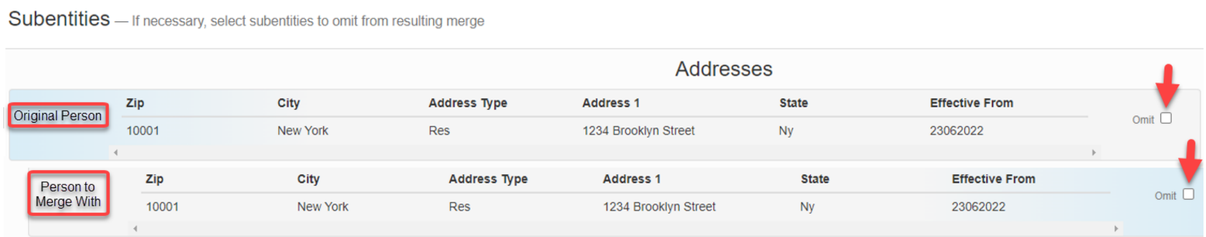
5. In the **Results**, select the person you want to merge:



6. After executing the search, three results show which include your original person, the person to merge with, and the merged result:

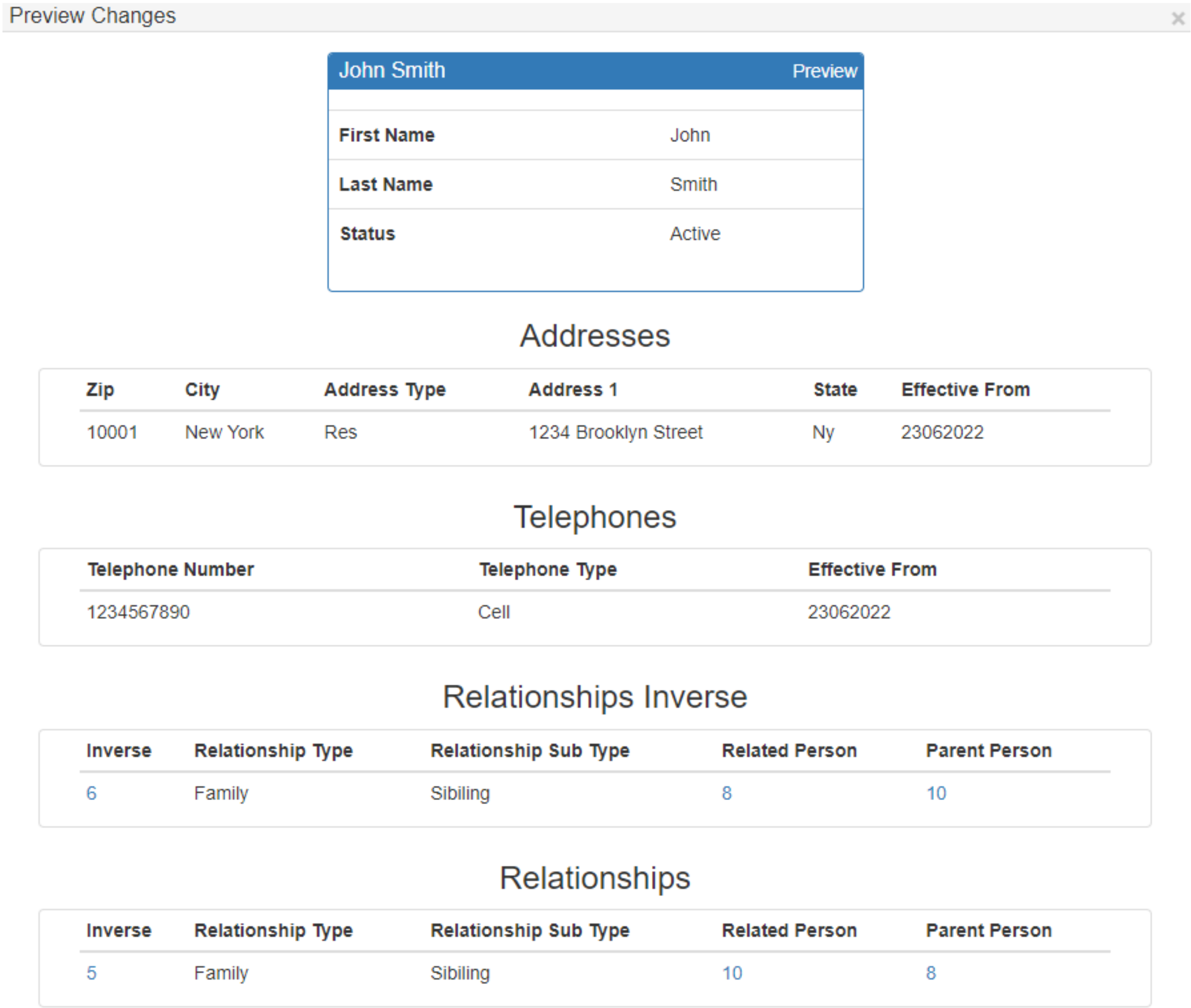


7. To finish your merge, you need to select which subentities you want to omit for your merged result. Select to omit the subentity from the original person or select to omit the subentity from the person to merge with:



8. After you finish selecting the subentities you want to keep, click **[Preview Changes]** at the bottom of your screen:

9. Review your changes from the **Preview Changes** screen. Click **[Save]** to save the changes, or **[Close]** to edit the changes:

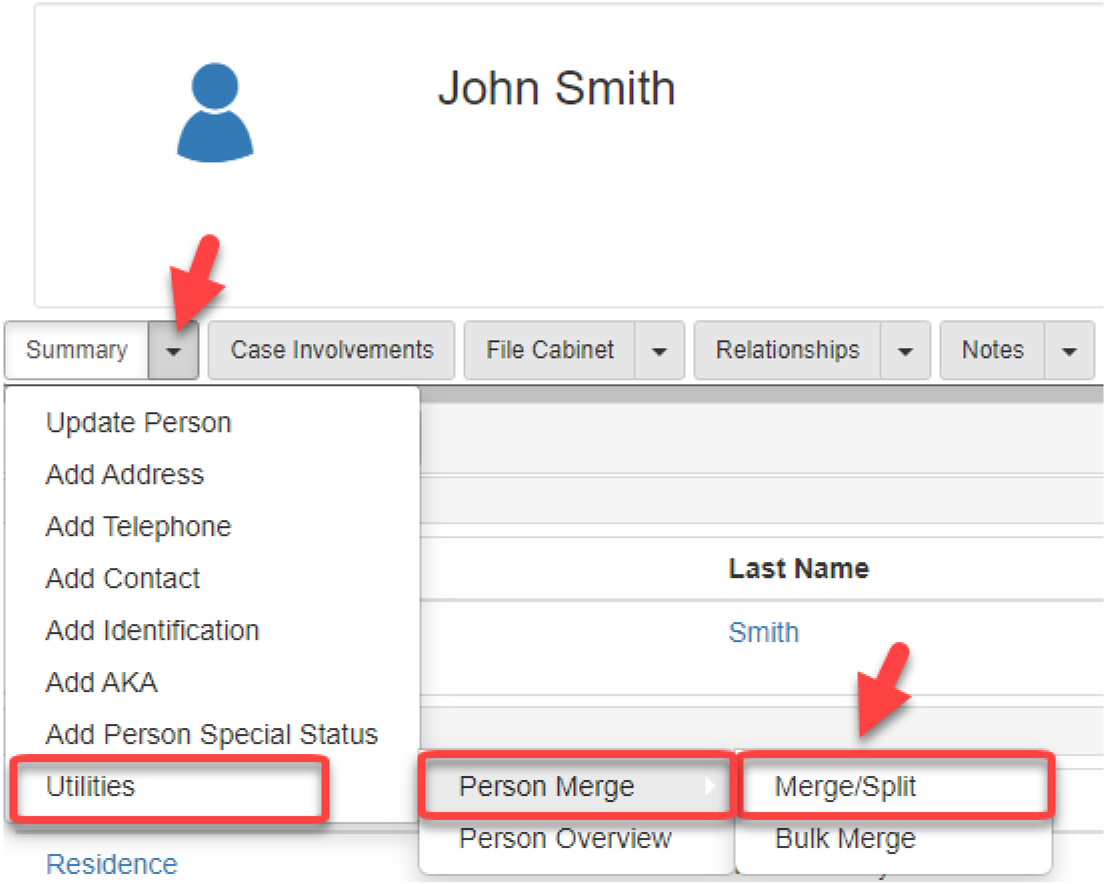


10. Click **[Cancel]** or **[Save]** on your **Person Merge**:

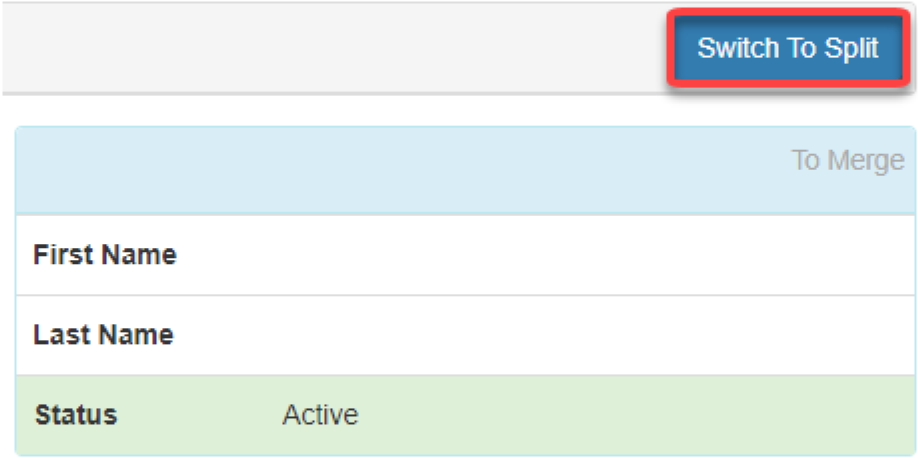
Person split

1. To start a person split, go to the person summary view by clicking the **Open Person View** icon:

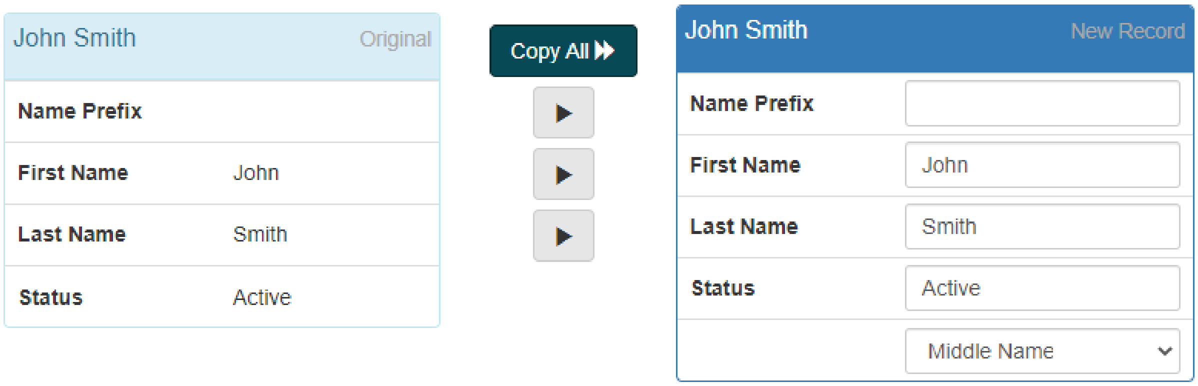
2. Click the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, then select **Merge/Split**:



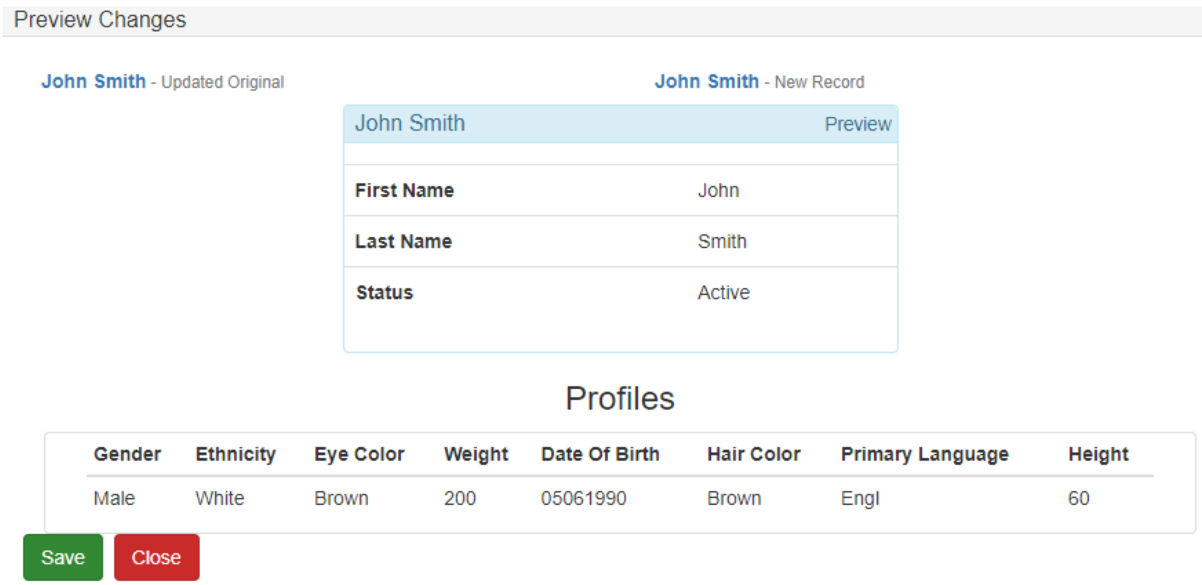
3. Click **[Switch To Split]** to the right of your screen:



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:



5. Preview your changes then click **[Save]**:



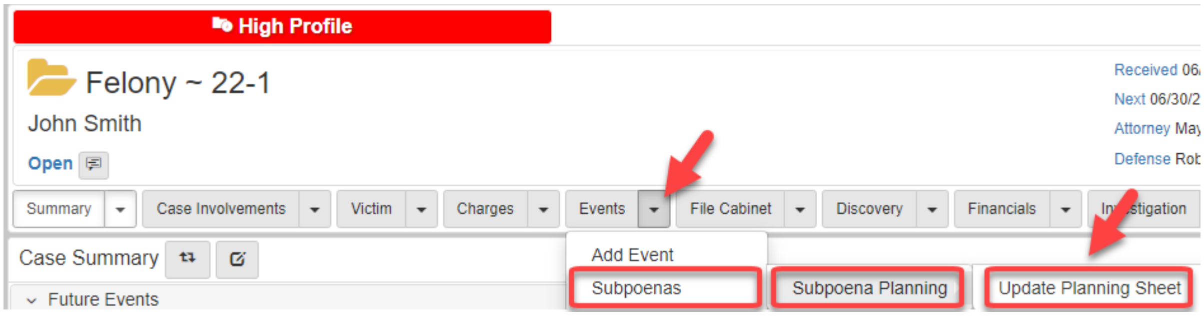
Subpoena process

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.

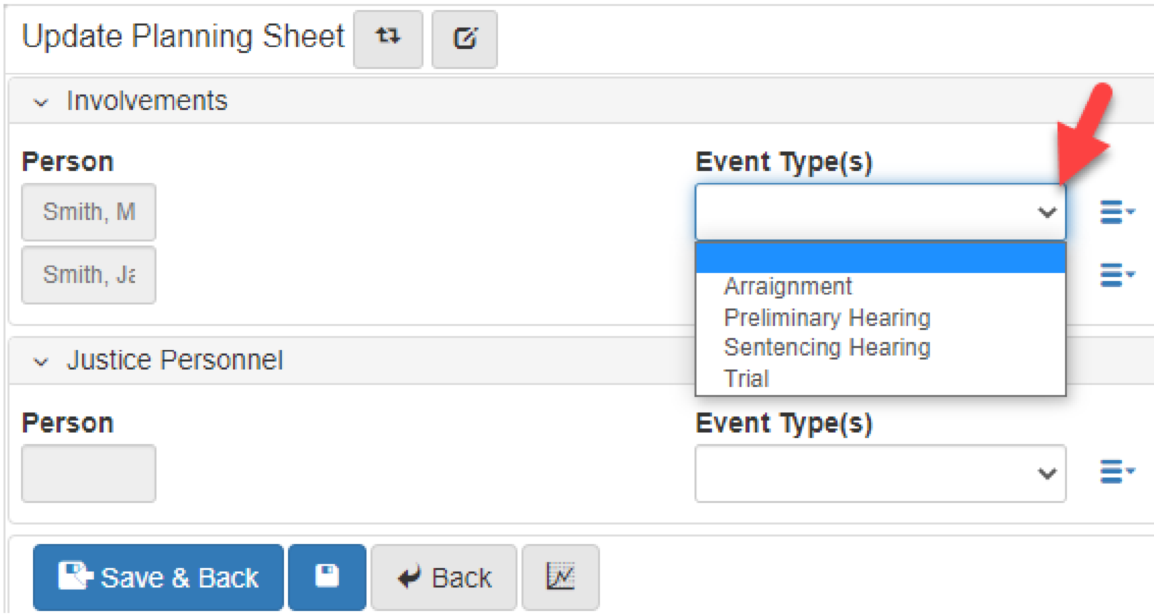
Update planning sheet

1. Start the subpoena process by clicking the Events dropdown arrow, hover over Subpoenas, hover over Subpoena Planning, and click **[Update Planning Sheet]**:

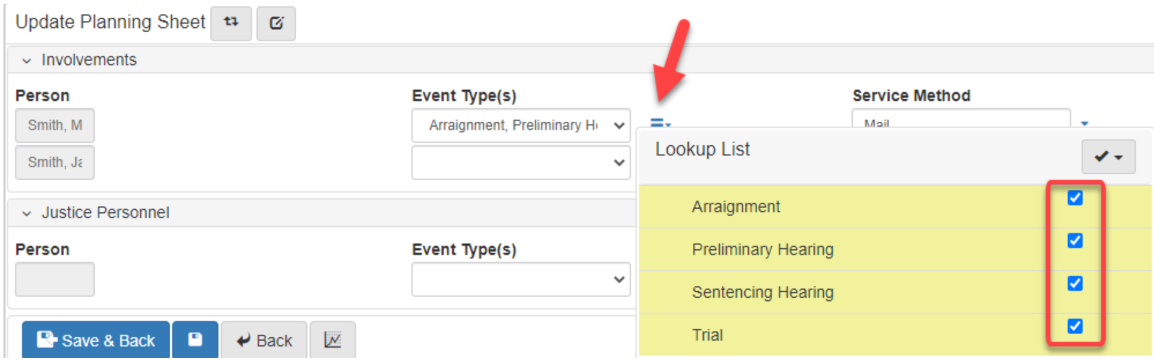


2. On the **Update Planning Sheet** screen, there are two ways to choose an event:

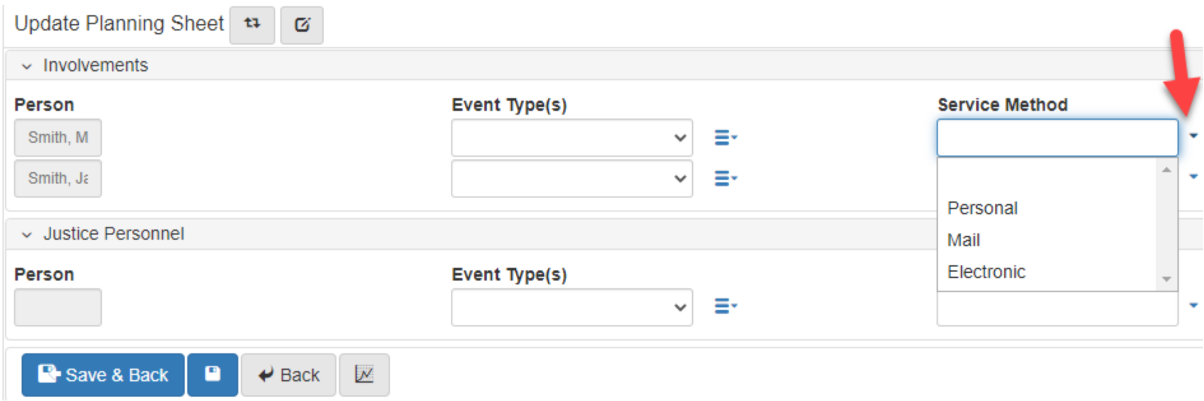
    - Use the **Event Types** dropdown. This allows choosing one event.



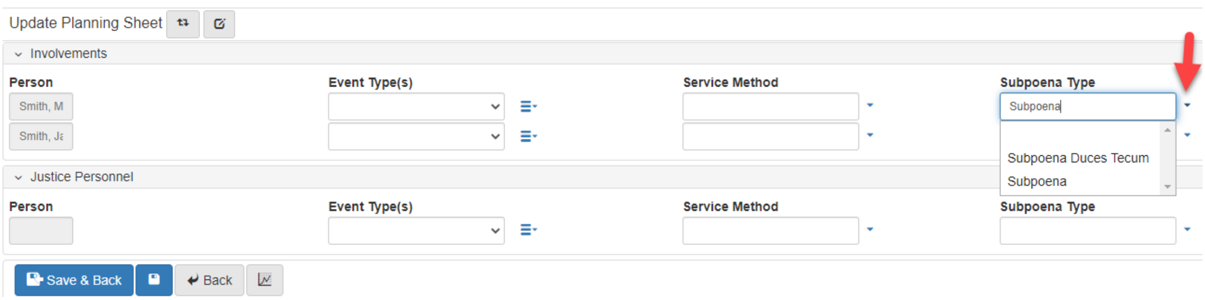
    - Use the lookup list next to **Event Types**. This allows choosing one or many events.



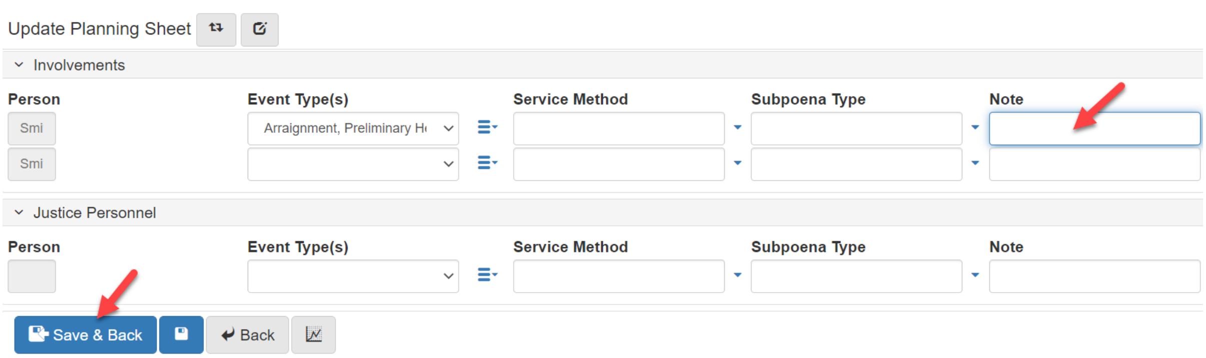
3. Select the **Service Method**:



4. Select the **Subpoena Type**:

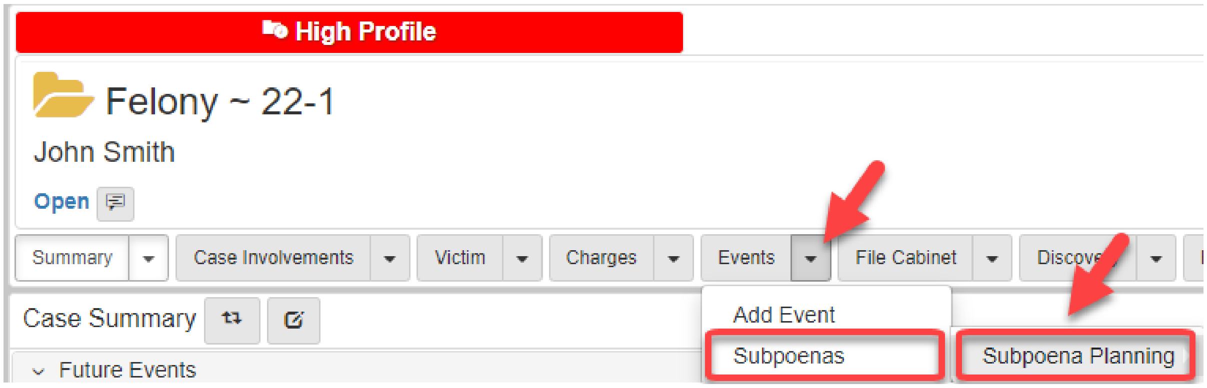


5. Enter a note.
6. When the planning sheet is finished, click **[Save and Back]**:

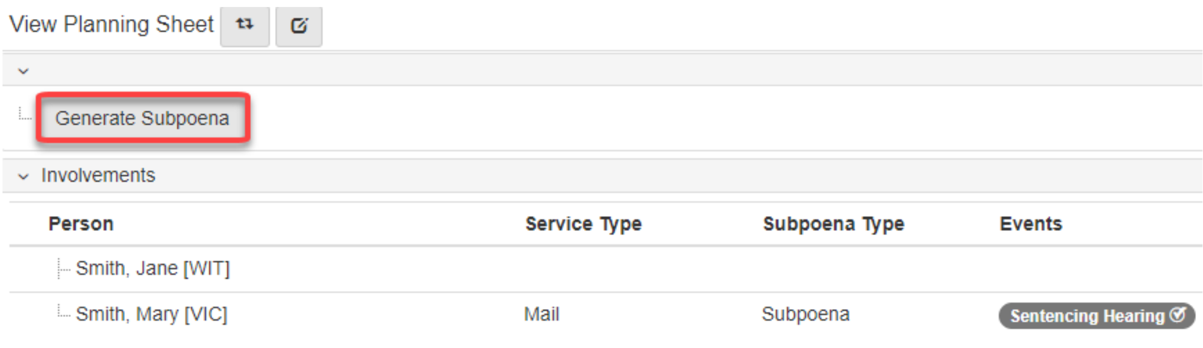


Subpoena planning

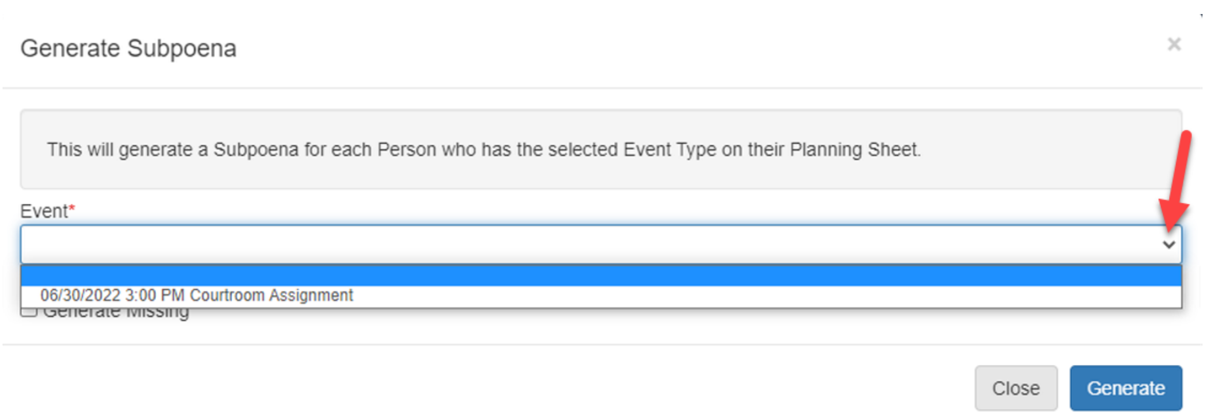
1. Generate a subpoena by clicking the **Events** dropdown, hovering over **Subpoenas**, then selecting **Subpoena Planning**:



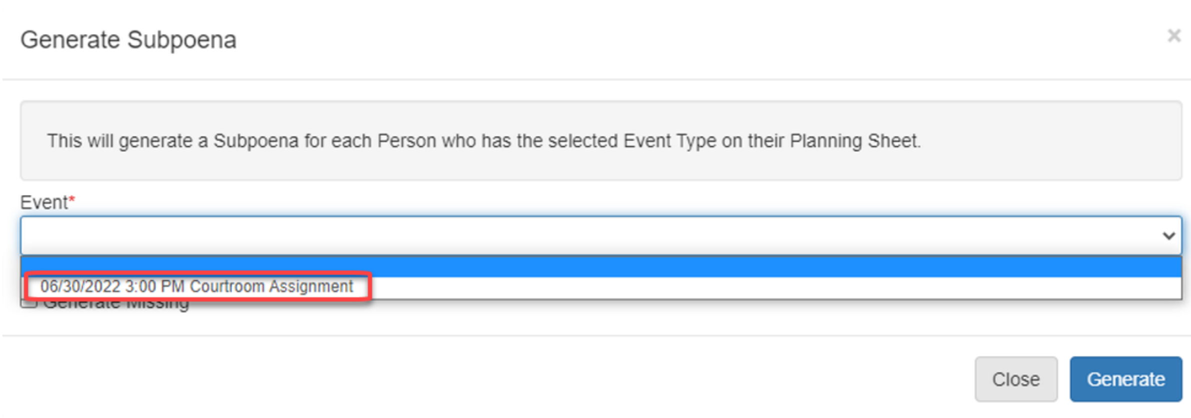
2. In the **View Planning Sheet Folder View**, click **[Generate Subpoena]**:



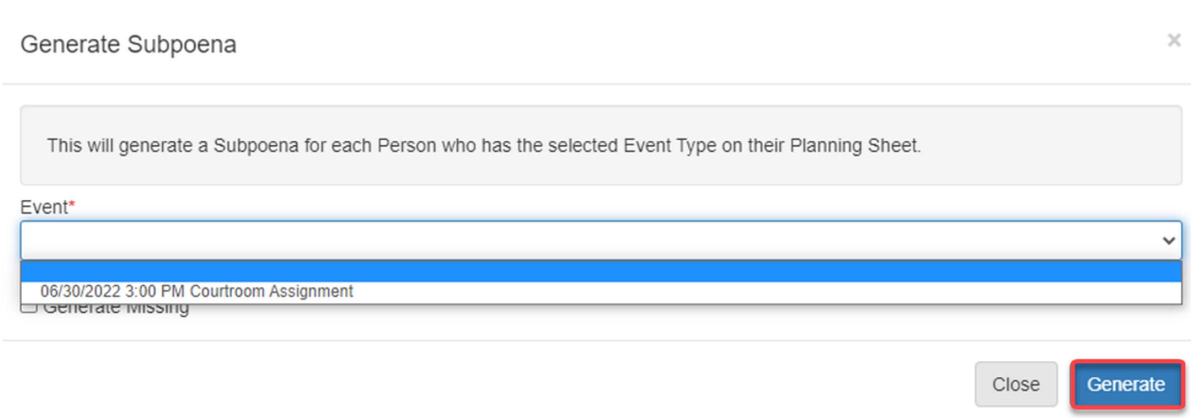
3. In the **Generate Subpoena** popup, click the **Event** dropdown:



4. Select the event for the Subpoena:

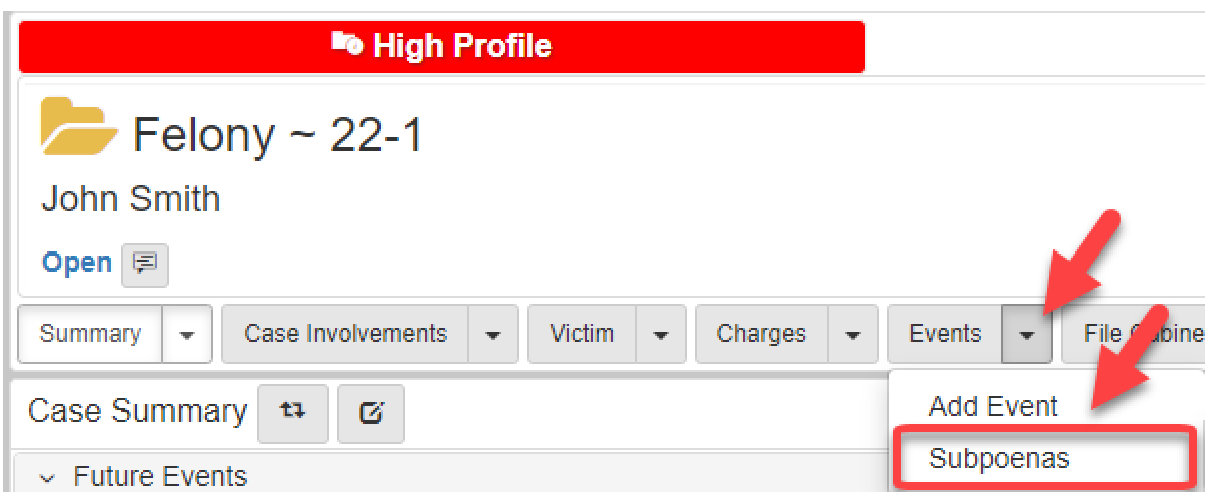


5. Click **[Generate]**:



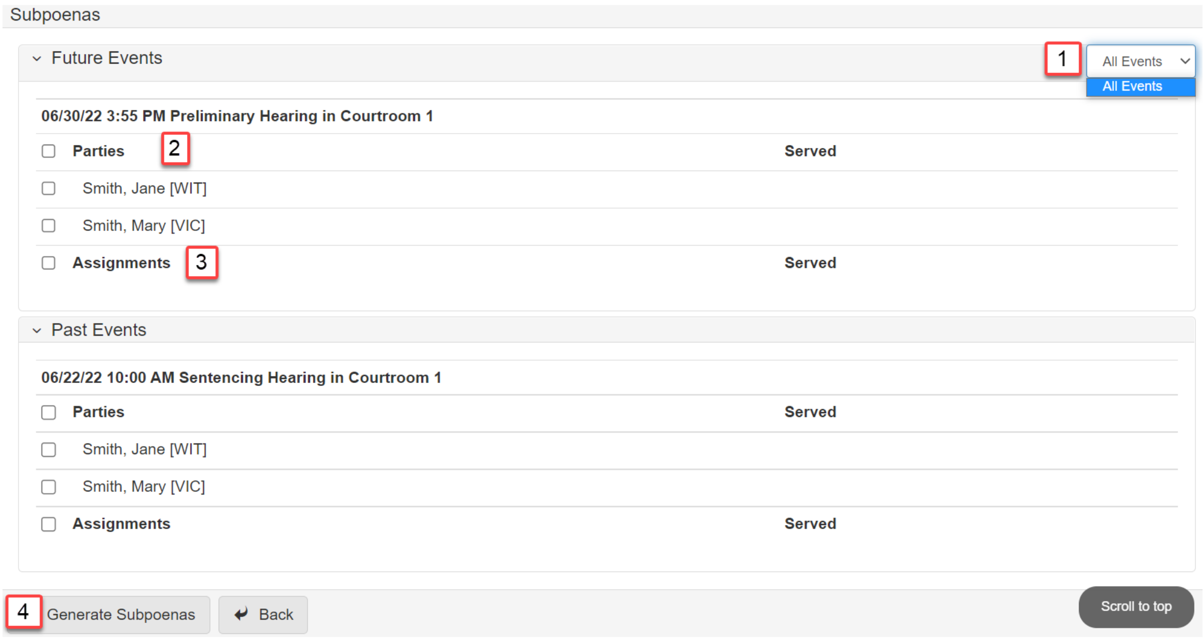
Subpoenas future and past events

You can also generate a subpoena by clicking the Events dropdown arrow then clicking the **[Subpoenas]** button:



1. Select the events that need subpoenas generated.

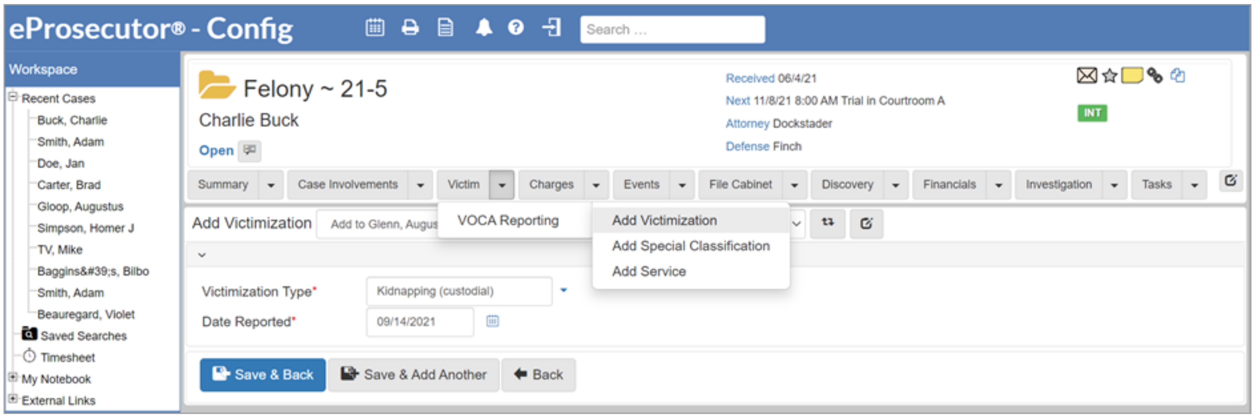
2. Select the parties that need to be served.
3. Select the assignments that need to be served.
4. Click **[Generate Subpoenas]**:



VOCA reporting

Add VOCA report items

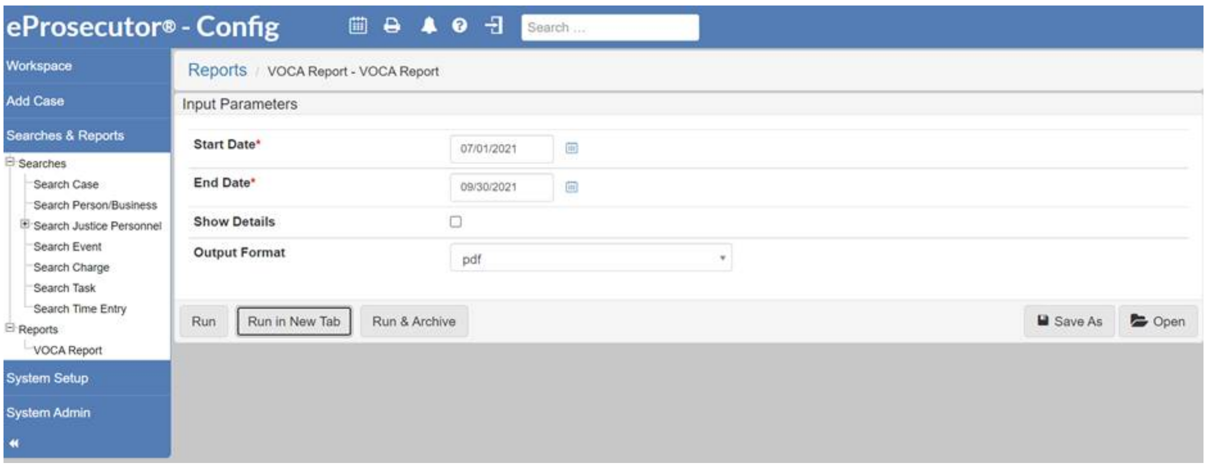
The Federal Victims of Crime Act Report (VOCA) includes victimizations, special classifications, and services. Adding these items are found in the **Victim** dropdown in a case. The added items are viewable from the **Victim Folder View**:



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

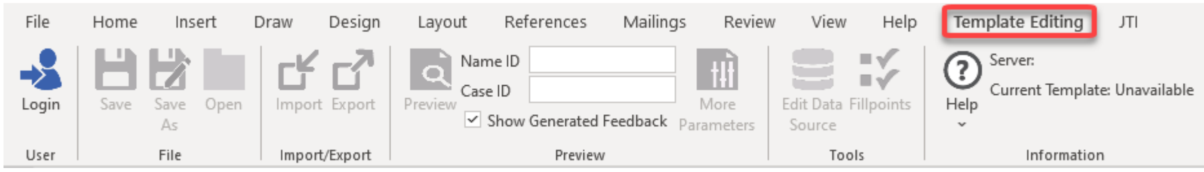
I. Population Demographics

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

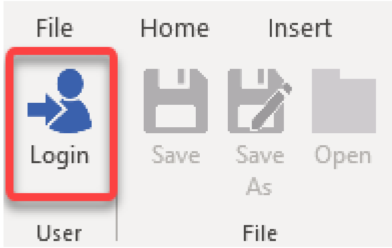
4. JDA documentation

Login process

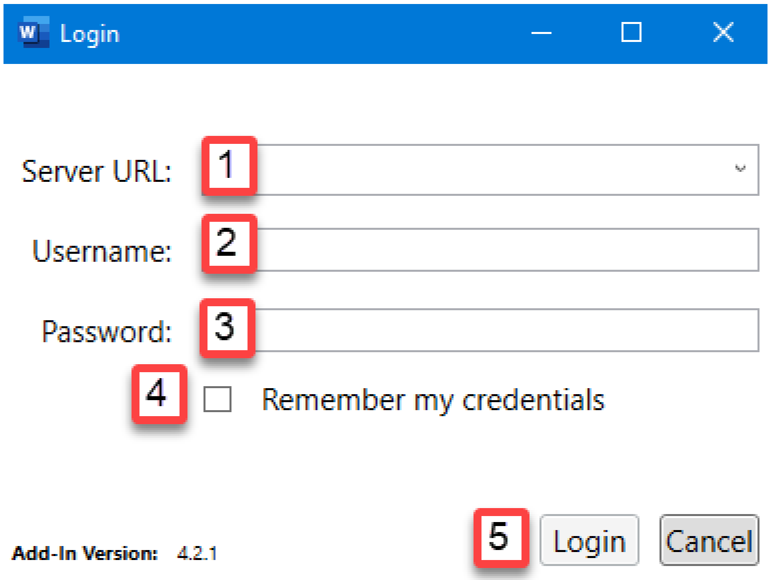
1. To access your JDA documentation, open Microsoft Word and click the Template Editing Menu.



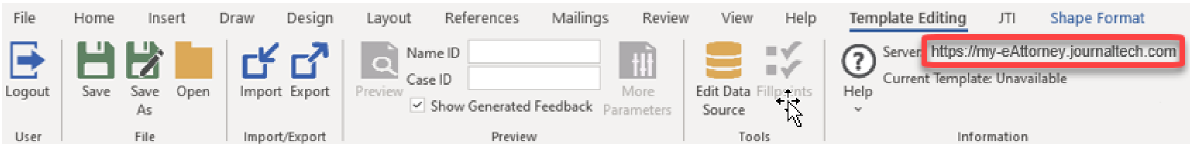
2. Select `Login`.



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]**.

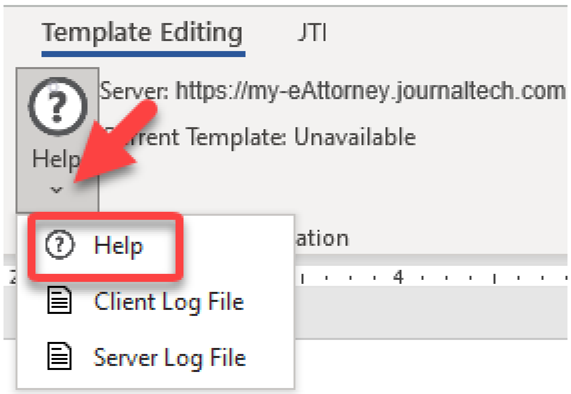


4. After you complete the login process, your server URL is included in the Template Editing ribbon.

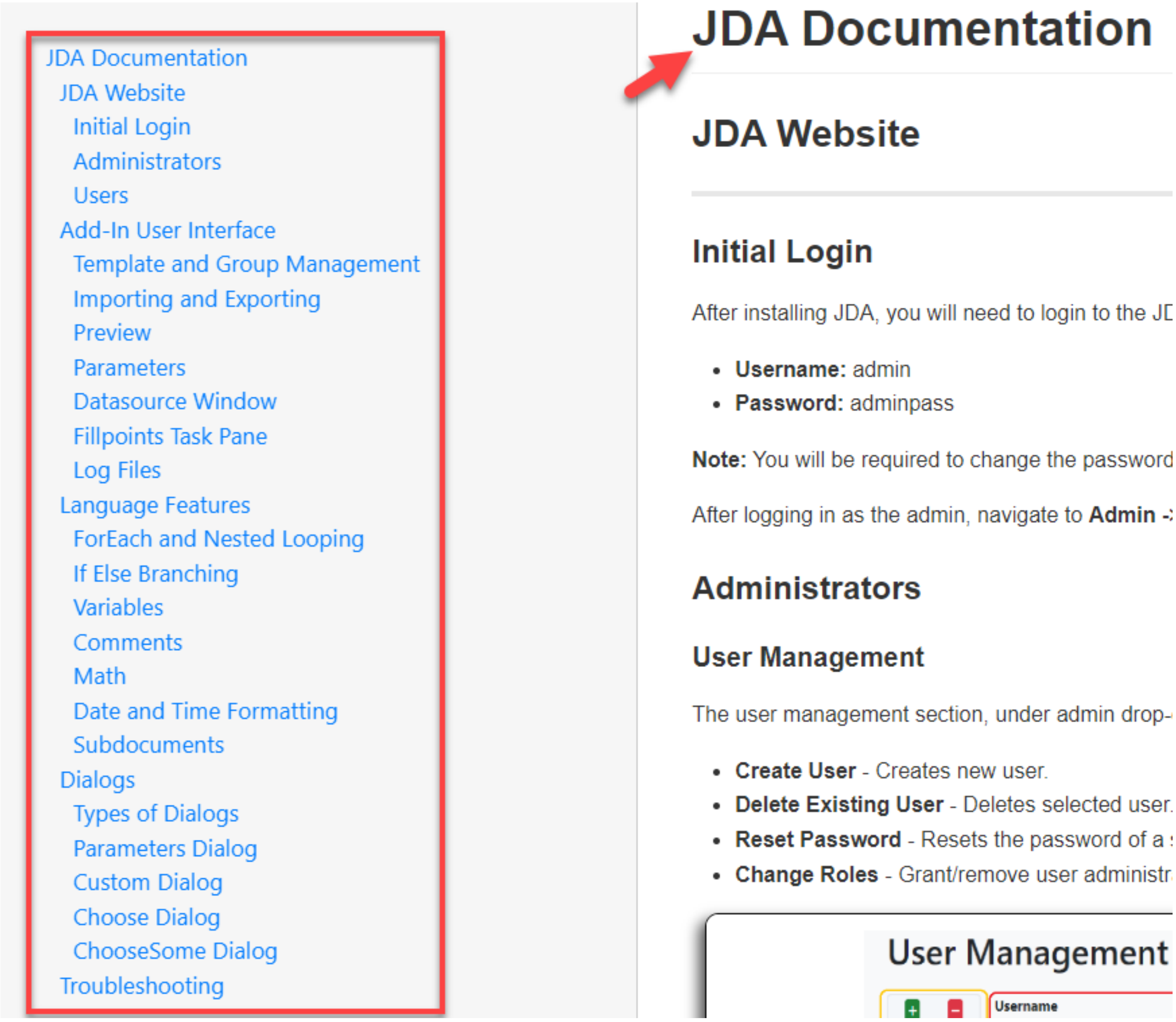


Accessing JDA help documentation

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 JD
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
User Management
Username