eProsecutor Online 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 eProsecutor Online.

Business processes guide

Learn about eProsecutor Online processes and workflows.

Administrator guide

Learn how to administer an instance of eProsecutor Online.

Video library

Review eProsecutor Online training videos.

2. User guide

What is eProsecutor Online?

A web-based case and matter management system with integrated document management.

Features

eProsecutor Online includes the following features:

Case management

- **Supports Civil and Criminal Case Types**.
- **Basic Investigation Task Assignments**.
- **Codefendant or joined defendant and plaintiff tracking**. When 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 eProsecutor Online.
- 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.

Prerequisites

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

Access eProsecutor Online

Overview

eProsecutor Online is a web app securely managed by Journal Technologies, Inc. in the AWS GovCloud [https://aws.amazon.com/govcloud-us/]. The web app can be accessed from:

- Desktop computers: Windows, Mac, or Linux.
- Smartphones: iPhone or Android.
- Mobile devices: iPad, Galaxy, Surface.

Users only need a web browser to securely access the system.

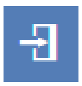
Log in

Your administrator provides a link to eProsecutor Online and a set of user credentials to log in with.

1. Enter your username and password.
2. Click **[Login]** to log in to eProsecutor Online.
3. Select **Stay Logged In** to stay logged in across browser sessions.
4. If you forget your password, click **[**`I forgot my password`**]**. You may be prompted to

answer security questions. An email is sent to you with further steps to reset your password.

Log out

To log out, click  in the top navigation bar.

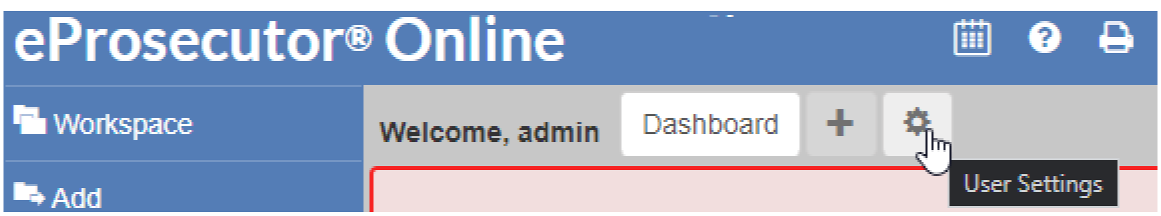
Manage your user password

A user can change their password after logging in.

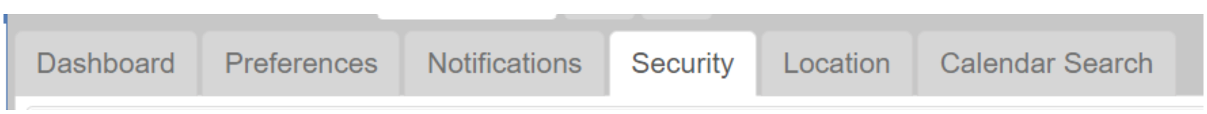
Procedure

1. If you are on a page other than the **Dashboard**, click the product identifier at the top left to show the **Dashboard**:

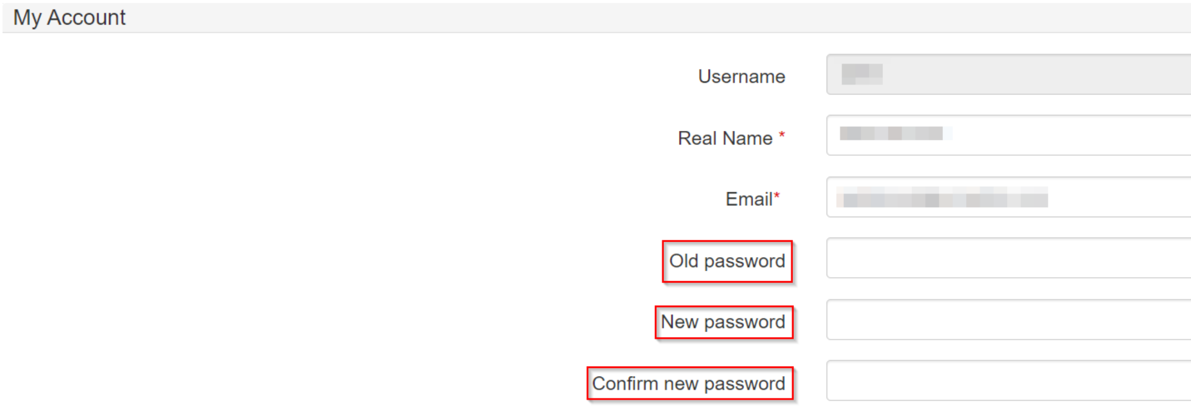
2. Click the **User Settings** icon, to the right of the **Dashboard** tab.



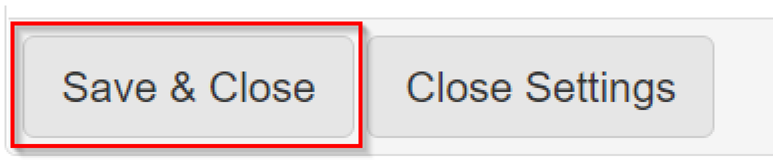
3. Click the **Security** tab on the Dashboard.



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



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



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 top 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.

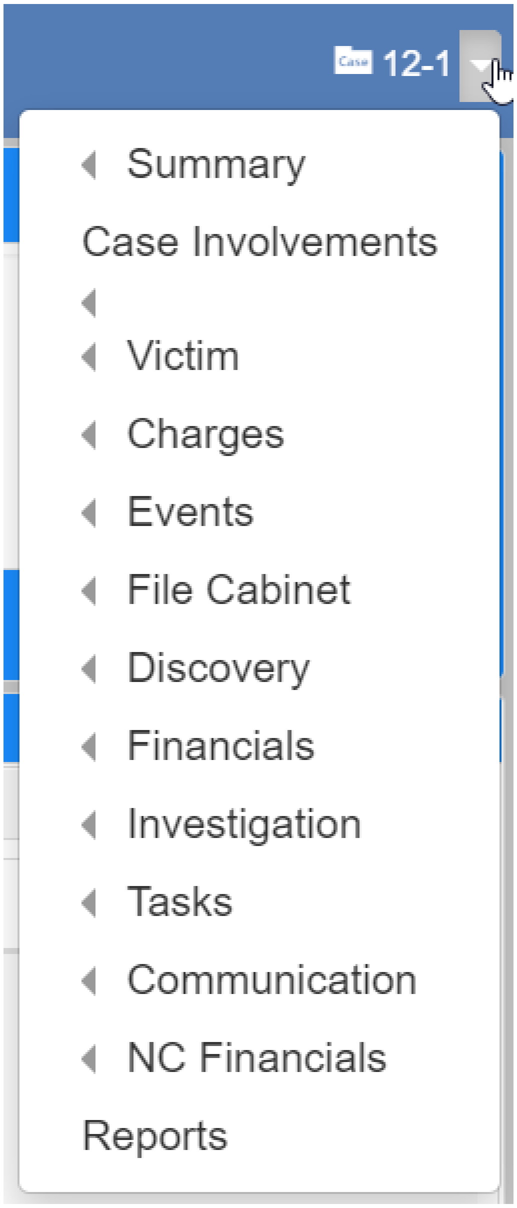
Item	Action
Bell Icon	Click to check your notifications.
Question Icon	Click to show help documentation.
Door Exit Icon	Click to log out.
Top navigation search bar	Click to search all entities and resources.

Right side

The right side of the top navigation Bar includes links for recent case navigation.

- Click the **CaseId Folder** icon to show the most recent **Case** you accessed:

- Click the down arrow to show more quick-access **Case** actions:

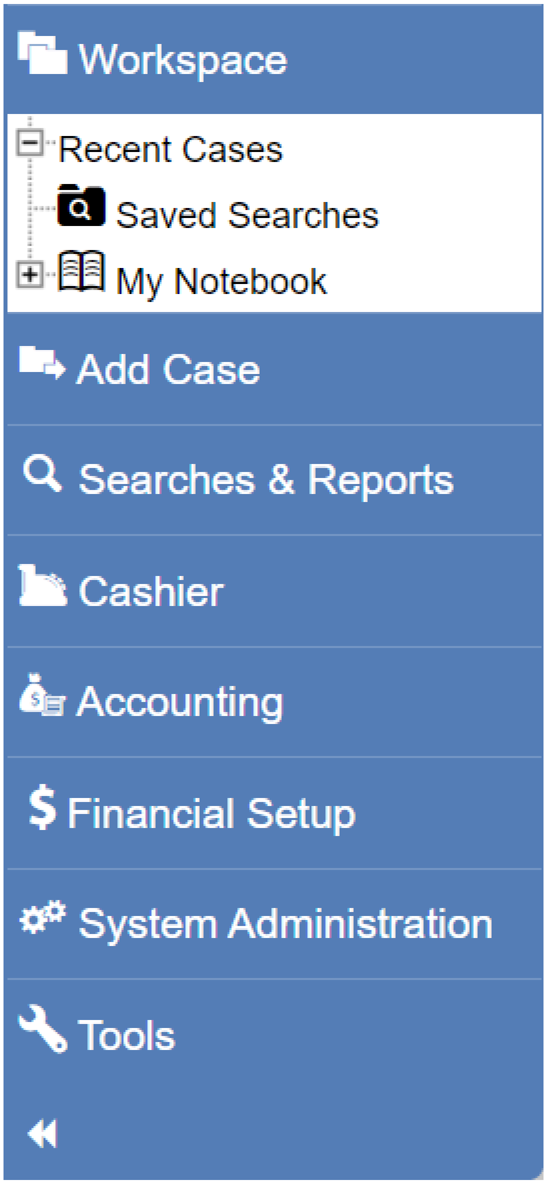


Left navigation

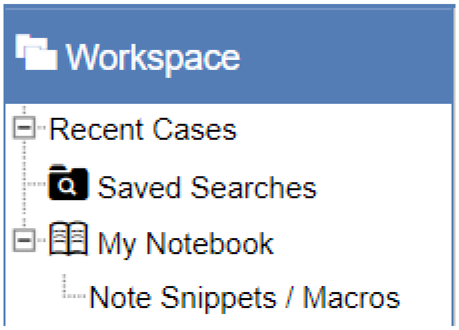
Different security groups affect the existence of items in the left navigation pane. For more information, refer to User navigation.

Sections

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



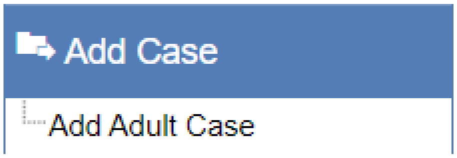
Workspace



- **Recent Cases**: Shows links to a few of your recent cases for quick access to the case view.

- **Saved Searches**: Review, run or edit your saved searches. Refer to Saved search gadget for more information.
- **My Notebook**: Manage your notes and Shared Notes.
  - **Note Snippets / Macros**: Manage text snippets for fast data entry or writing prompts.

Add case

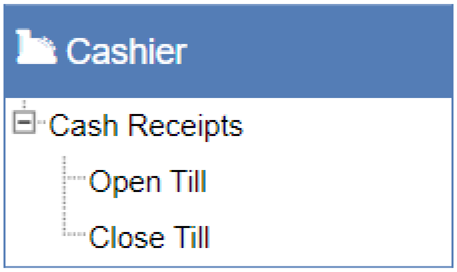


- **Add Adult Case**: Shows the **Add Case** screen. Refer to Create a case for more information.

Searches and reports

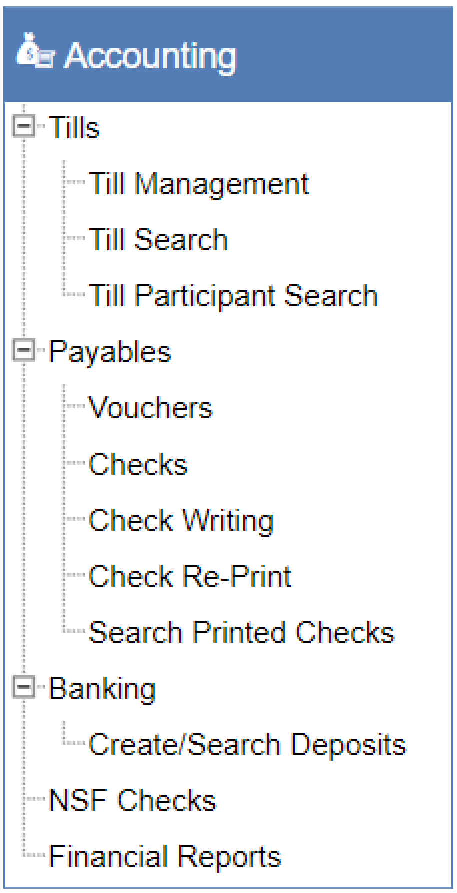
- **Search Case**: Search for cases.
- **Search Person/Business**: Search for a Person or Business.
- **Search Justice Personnel**: Search for Justice personnel.
  - **Caseload**: Search for Justice Personnel caseload.
- **Search Scheduled Event**: Search for Scheduled Events.
- **VOCA Report**: Search for VOCA data.

Cashier



- **Cash Receipts**: Show the Cash receipts screen.
  - **Open Till**: Open a Till for the current user.
  - **Close Till**: Close the open Till for the current user.

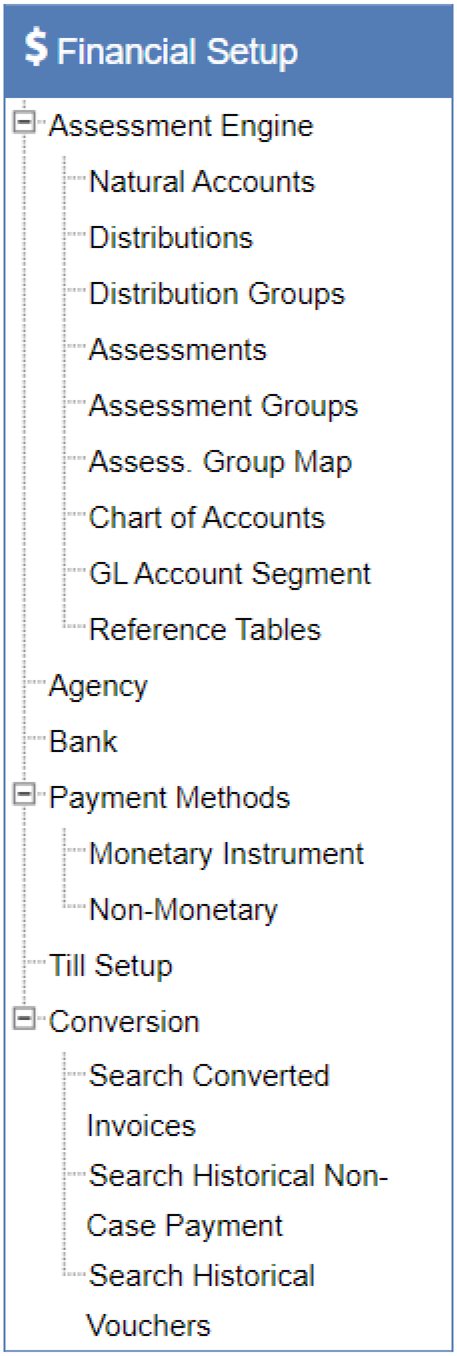
Accounting



- **Tills**: Search Tills and Till users.
  - **Till Management**: Search for and manage Tills.
  - **Till Search**: Search and view existing Tills.
  - **Till Participant Search**: Search for users with Tills.

- **Payables**: Search Vouchers, Payables, and Checks.
  - **Vouchers**: Search Vouchers and Payables.
  - **Checks**: Search Vouchers or Search Checks.
  - **Check Writing**: Search for money available to write a check.
  - **Check Re-Print**: Reprint checks.
  - **Search Printed Checks**: Search printed checks.
- **Banking**: Search and manage Deposits.
  - **Create/Search Deposits**: Create or Search for existing Deposits.
- **NSF Checks**: Search for "not sufficient funds" checks.
- **Financial Reports**: Show various SSRS financial reports.

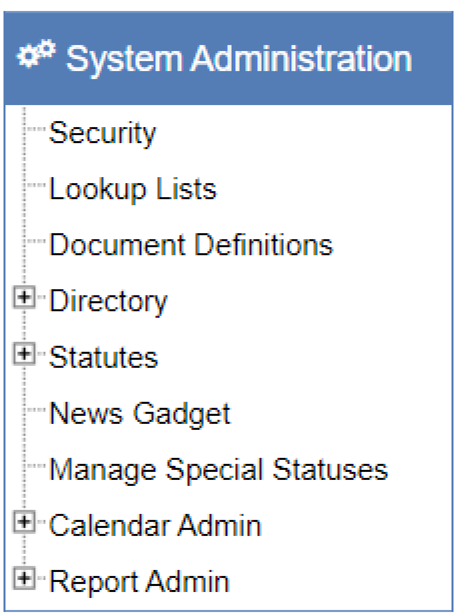
Financial setup



- **Assessment Engine**: Search and manage General Ledger data.
    - **Natural Accounts**: Search for and create natural accounts.
    - **Distributions**: Search for and create distributions.
    - **Distribution Groups**: Search for and create distribution groups.
    - **Assessments**: Search for and Add Assessment Items.
    - **Assessment Groups**: Search for and add assessment groups.

    - **Assess. Group Map**: Manage assessment group mappings.
    - **Chart of Accounts**: Search for and add **Case** jurisdiction to natural account connections.
    - **GL Account Segment**: Add GL account segment items.
    - **Reference Tables**: Create financial reference tables.
- **Agency**: Manage agency accounts.
- **Bank**: Manage bank accounts.
- **Payment Methods**:
    - **Monetary Instrument**: Manage monetary payment types, like 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 a data conversion.
    - **Search Historical Non-Case Payment**: Search Non-**Case** payments from a data conversion.
    - **Search Historical Vouchers**: Search vouchers from a data conversion.

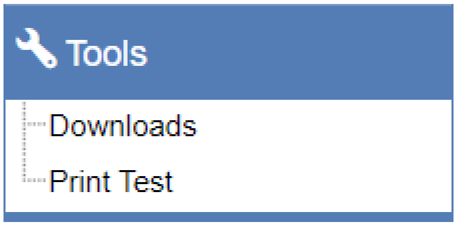
System administration



- **Security**: Manage User accounts and Security groups.
- **Lookup Lists**: Manage Lookup lists.

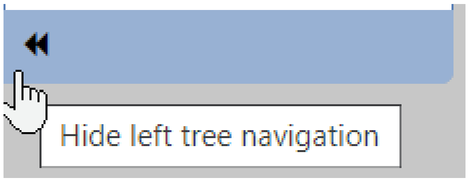
- **Document Definitions**: Manage Document definitions.
- **Directory**: Manage Directory Persons and Organizations.
  - **People**: Manage Directory Persons.
  - **Organizations**: Manage Directory Organizations.
- **Statutes**: Search Statutes.
  - **Search Statute Text**: Search Statute text.
- **News Gadget**: Manage content for the **Dashboard** News gadget.
- **Manage Special Statuses**: Manage Case and Person Special statuses.
- **Calendar Admin**: Manage Holidays and Test Calendar Sync.
  - **Holiday Calendar**: Manage agency holidays.
  - **Calendar Sync Test**: Test calendar synchronization with Google or Exchange.

Tools



- **Downloads**: Download tools and Microsoft add-ins.
- **Print Test**: Test the printing service.

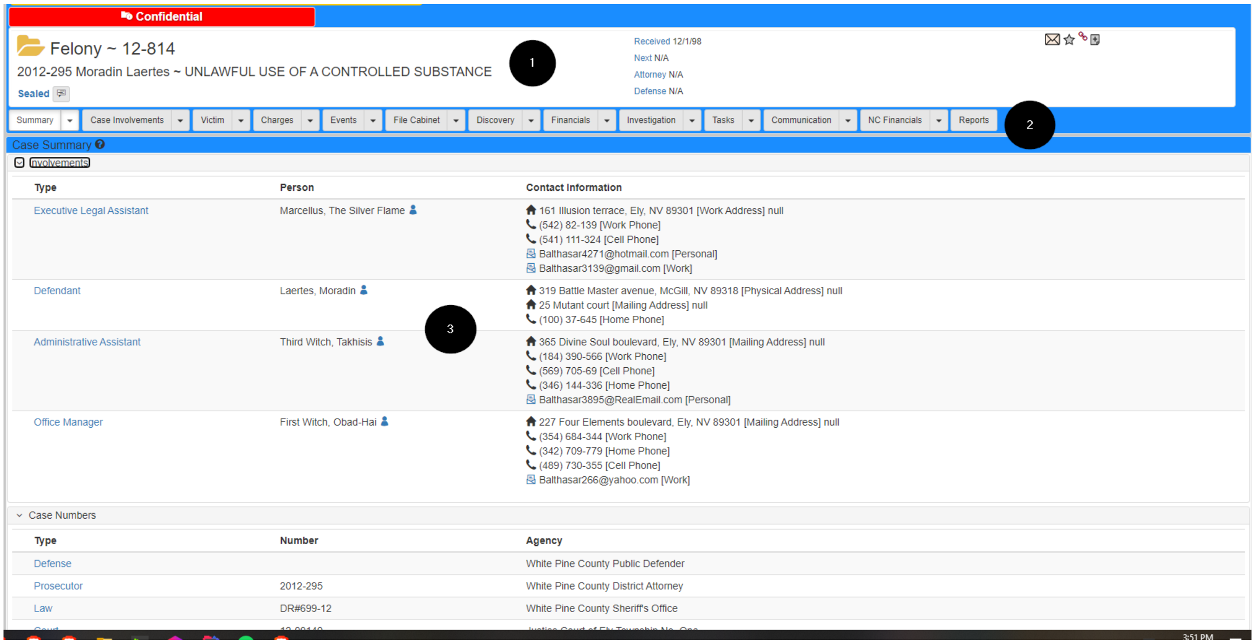
Double arrow



Click to hide the Left navigation panel for more screen space.

Case navigation

A **Case Navigation** screen:



1. A header.
2. Navigation buttons.
3. The Case Folder View.

Header

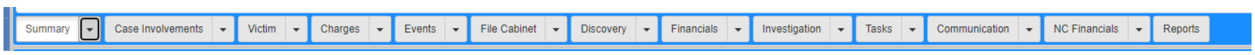
The **Case Header** shows a lot of information and allows you to make quick updates to the case.

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.

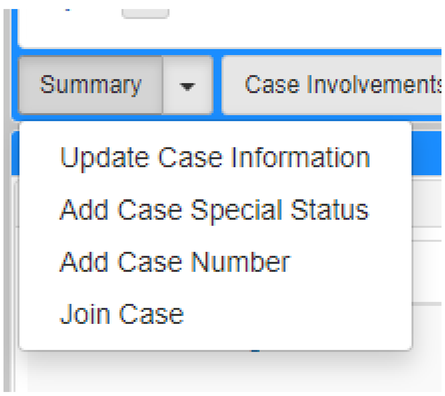
7. Widgets:
    - The **Send Email** widget: opens an email popup.
    - The **Case Watch** widget: adds this case to your watched cases list.
    - The **Joined Case** widget: opens a popup that shows joined case information.
    - The **Case Note** widget: opens a popup window that allows quick adding 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.



Case summary

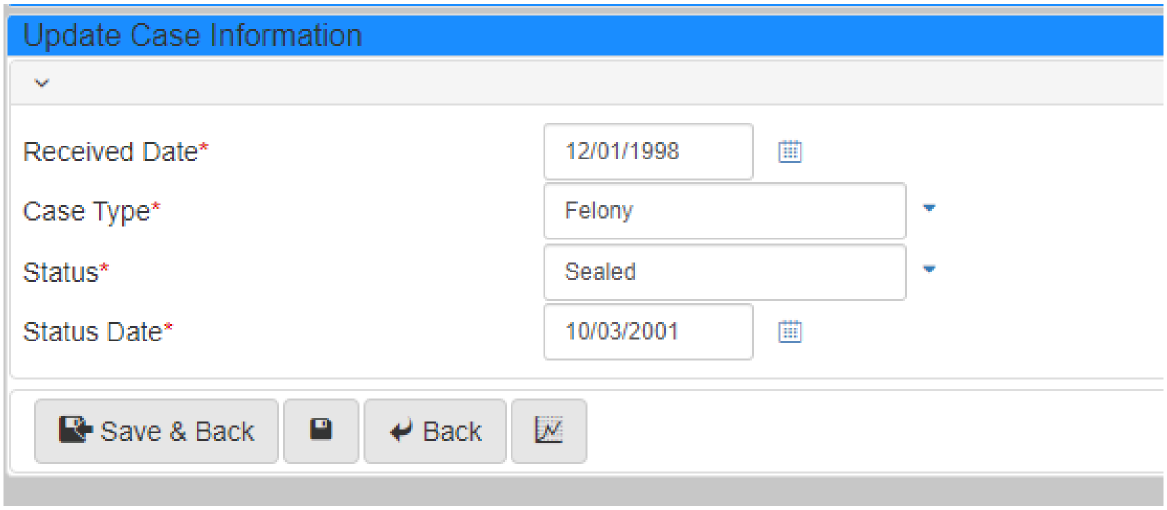


The **Summary** dropdown has options to update case information, add a special status or case number, or join cases.

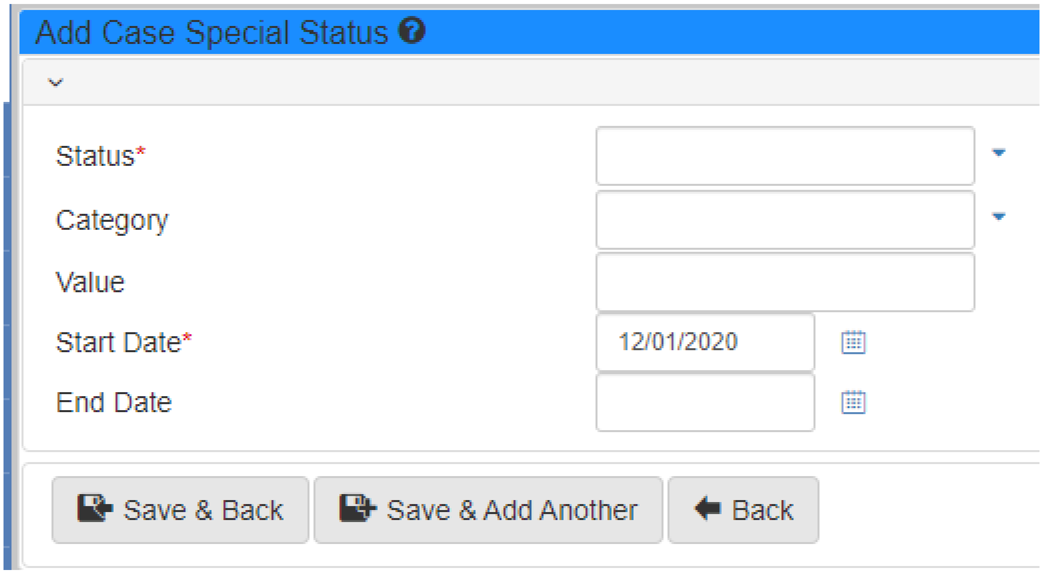
- Select **Update Case Information** to update the received date of the case, the case type, the case status, and the status date.

  NOTE

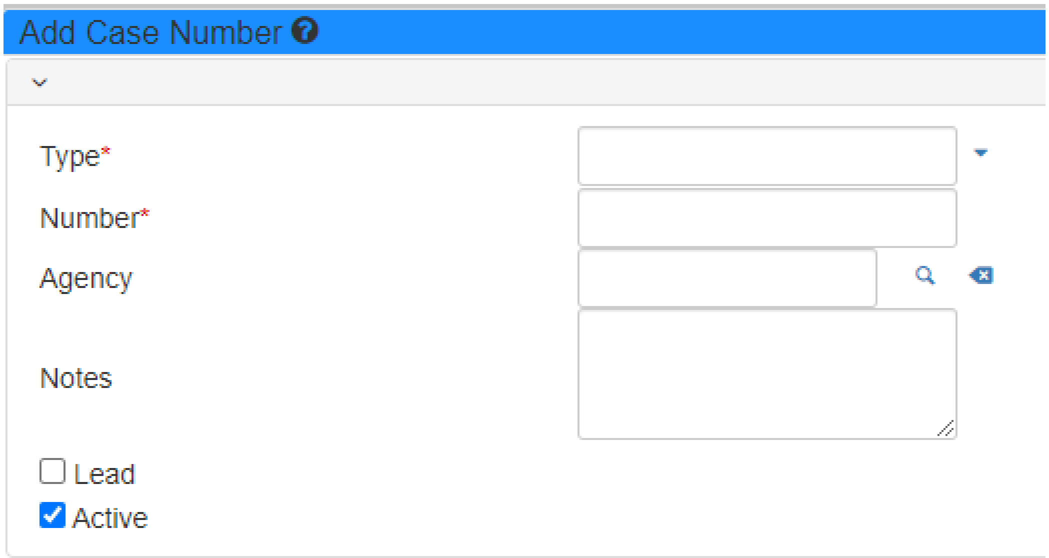
  All fields on this form are required for submission.



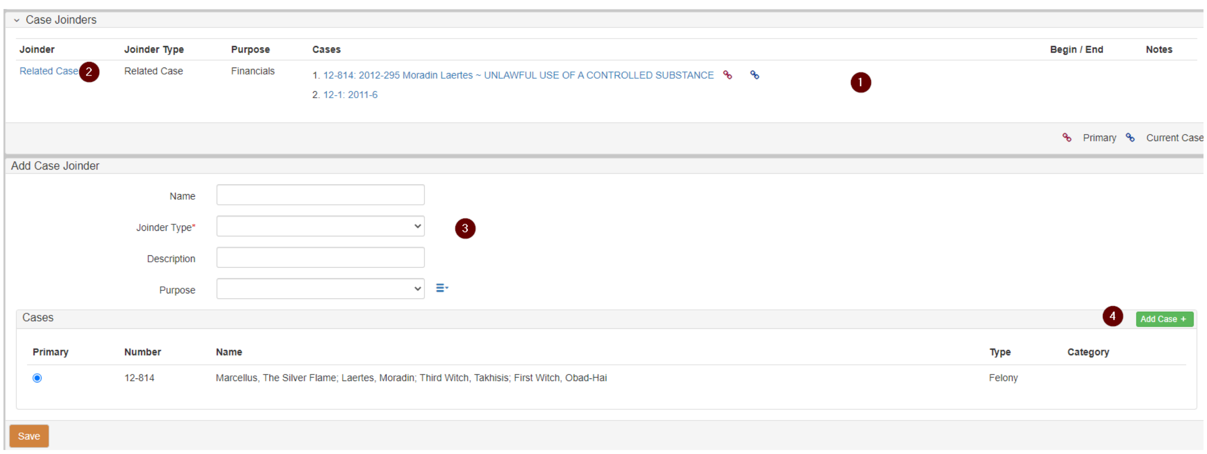
- Select **Add Case Special Status** to add a special status to a case. The form has only two required fields, **Status** and **Start Date**. The other included, optional fields are **Category**, **Value**, and **End Date**. The **Category** and **Status** fields are dropdowns, so they show their available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



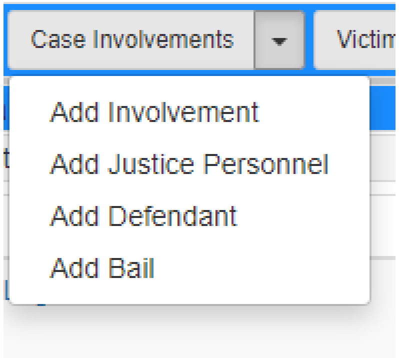
a. The **Case Joinders** panel shows **Joinders** associated with the case. A red icon shows next to the **Joinder** main case and a blue icon shows beside the current case.

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

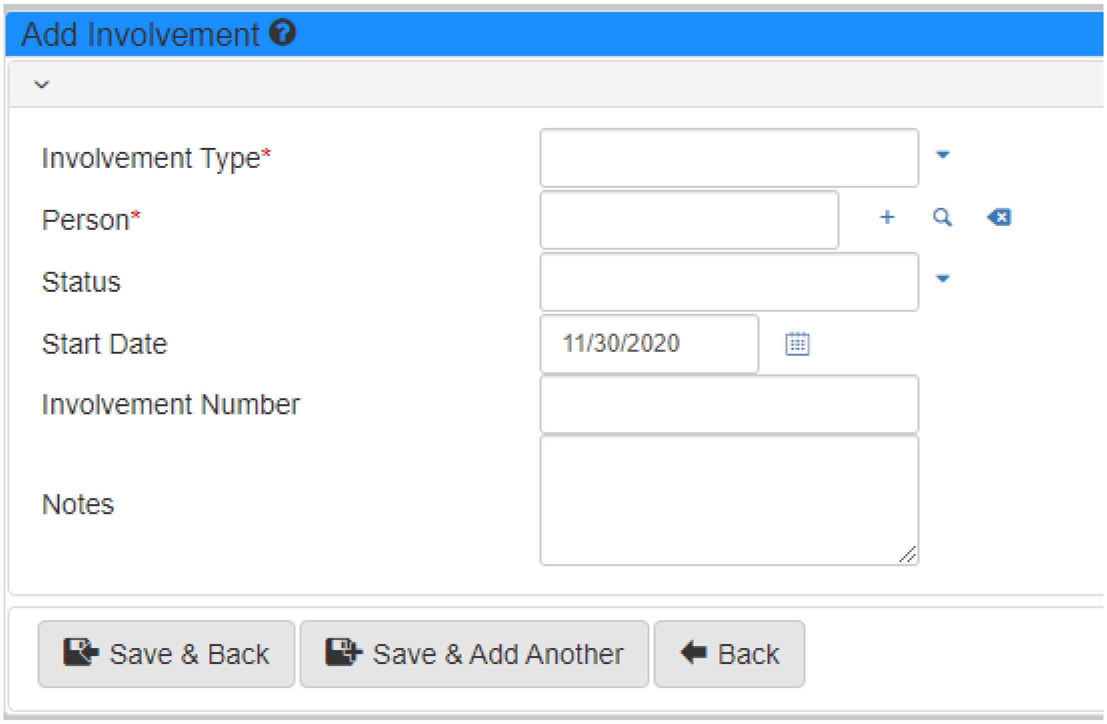
c. The **Add Case Joinder** panel creates a new **Case Joinder** associated with the selected case.

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

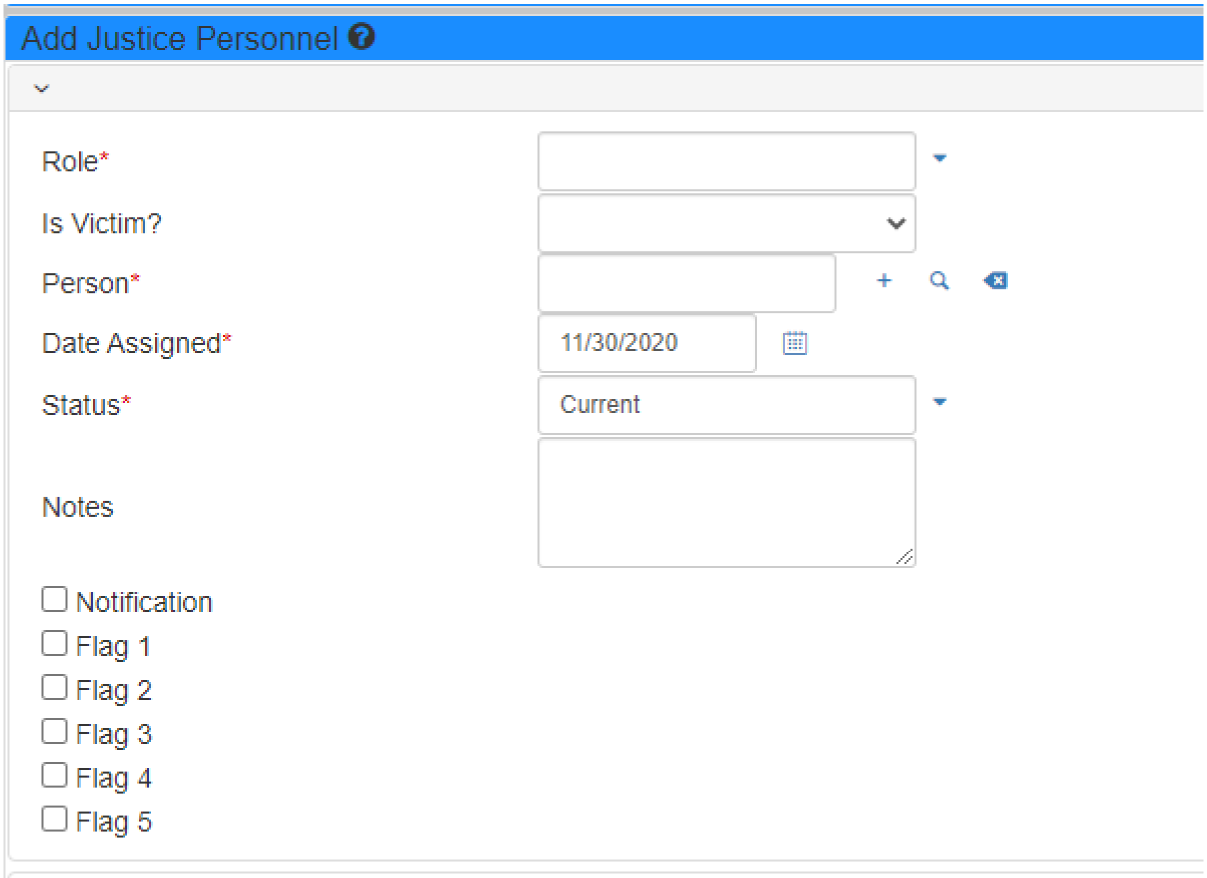
Case involvement [https://documentation.journaltech.com/eProsecutorOnline/user/cases/involvements.html]



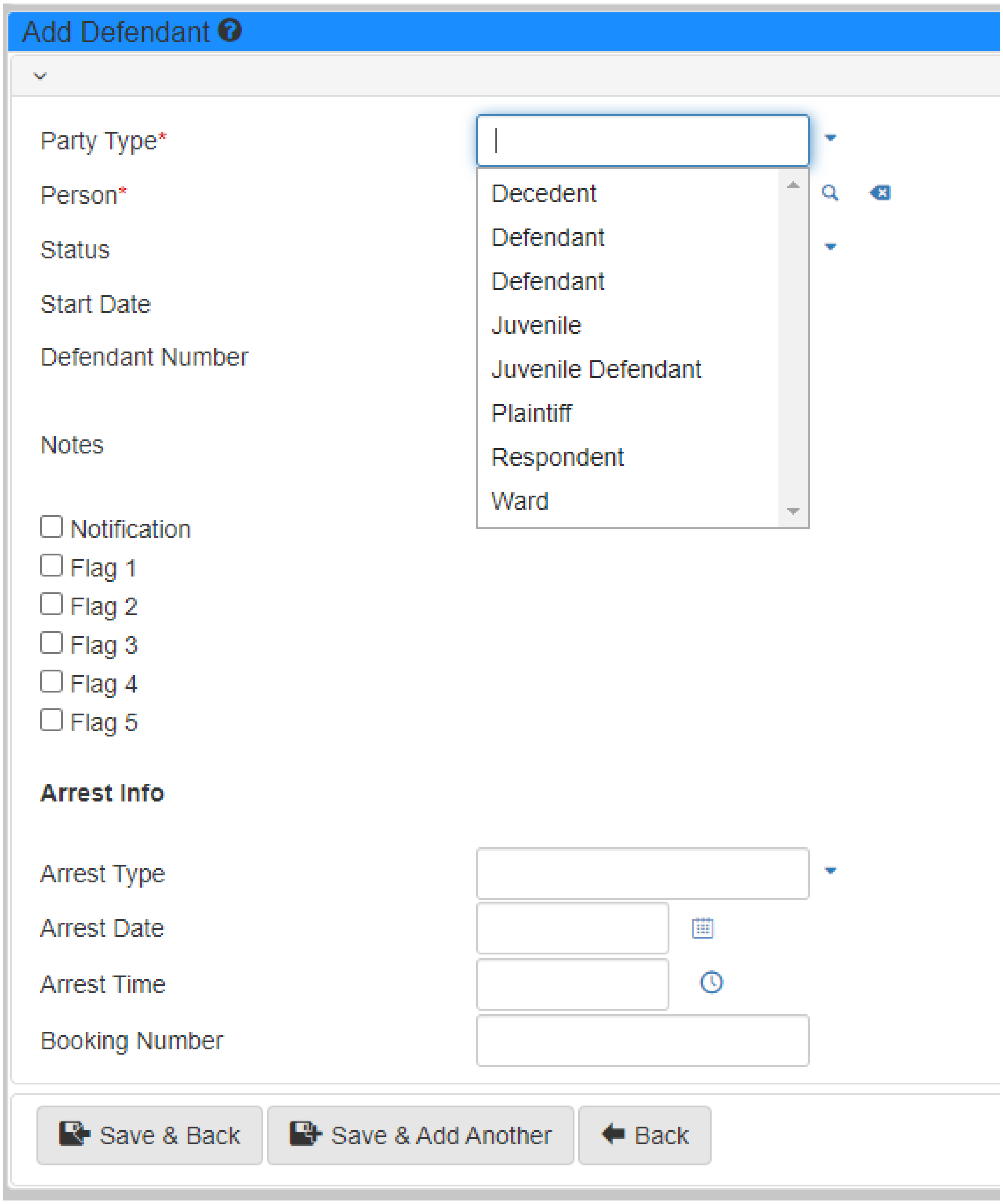
- Select **Add Involvement** to add an existing/new person and involvement type, including **Complainant**, **Witness**, or **Victim**, to the selected case.



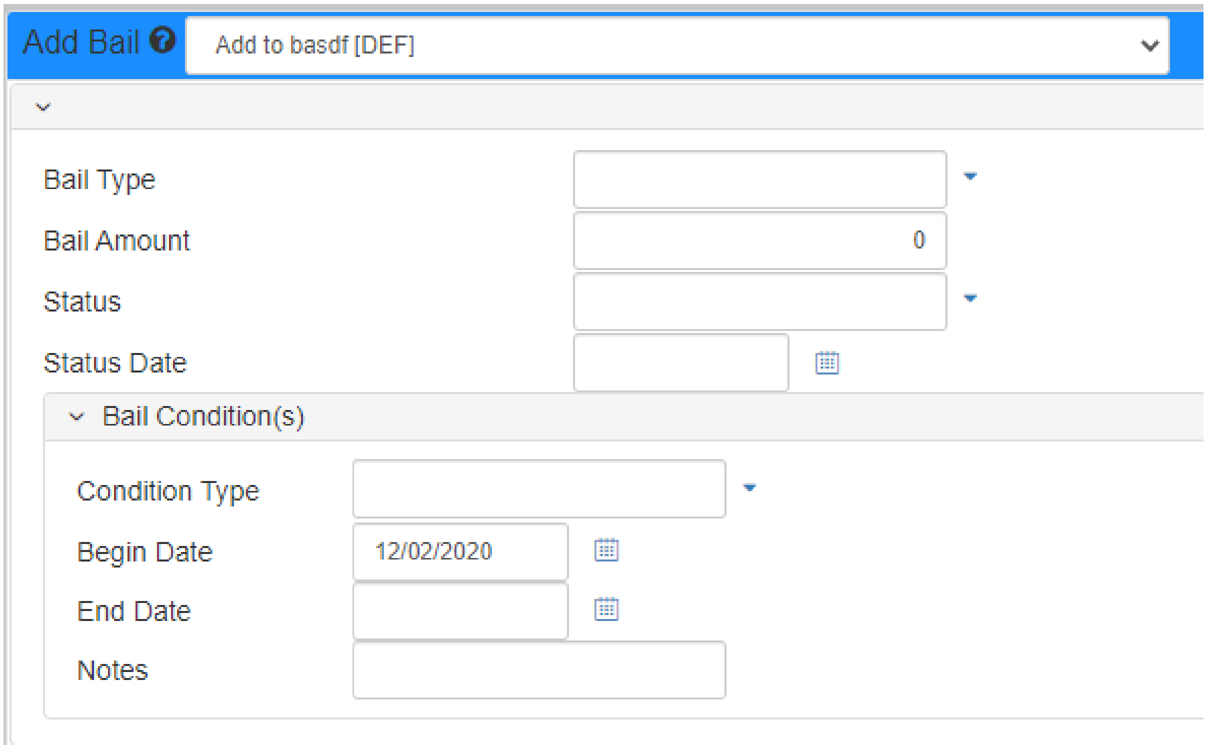
- Select **Add Justice Personnel** to add the case to the **My Recent Cases** gadget for the corresponding justice personnel.



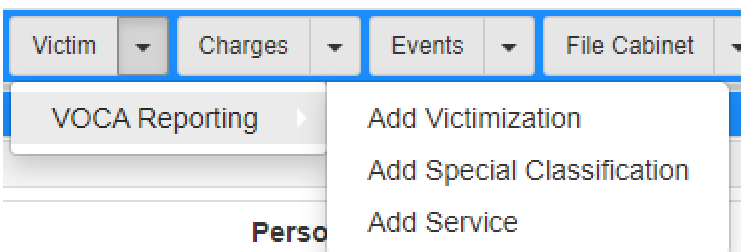
- Select **Add Defendant** to create a subcase and a party to the case. The subcase is added to aid financials.



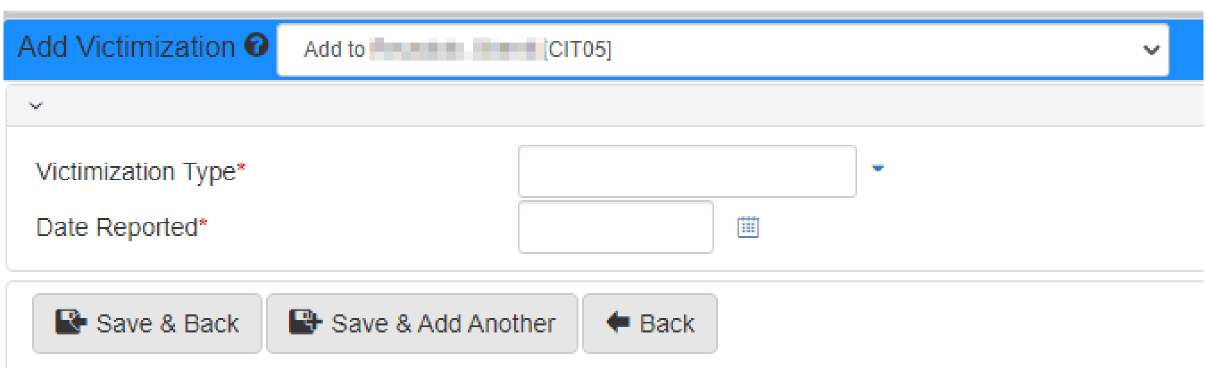
- Select **Add Bail** to add **Bail** information and conditions for the selected case involvement.



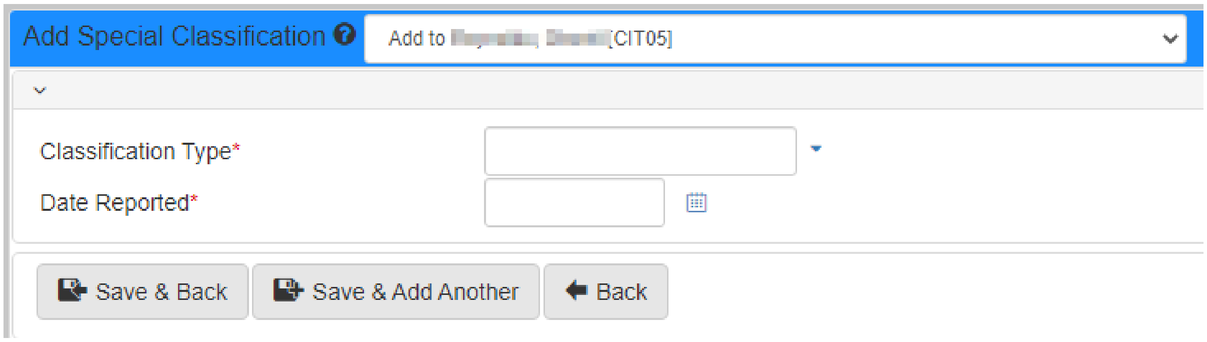
Victim and VOCA reporting



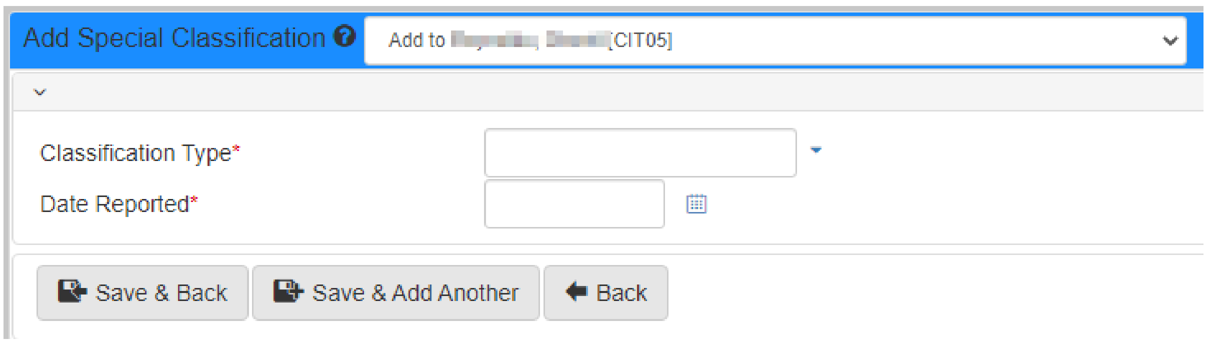
- Select **Add Victimization** to add a victimization type to a victim. Adding a victimization type requires a victim in **Case Involvements**.



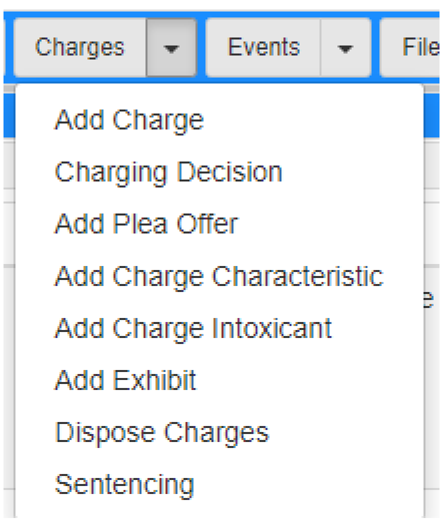
- Select **Add Special Classification** to add a special classification for a victim. The special classifications are used in VOCA reports.



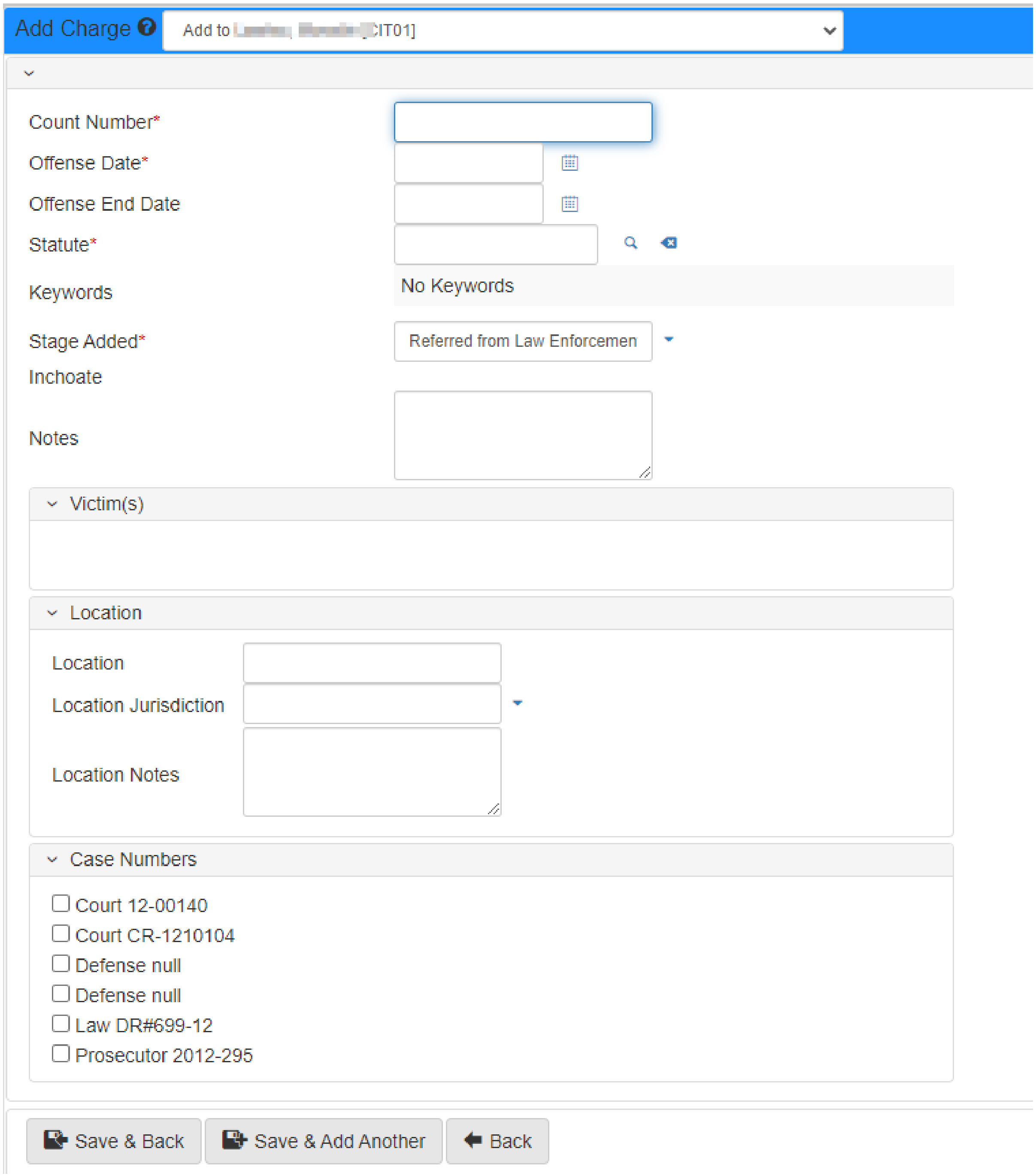
- Select **Add Service** to record a service provided to a victim. The services show in VOCA reports.



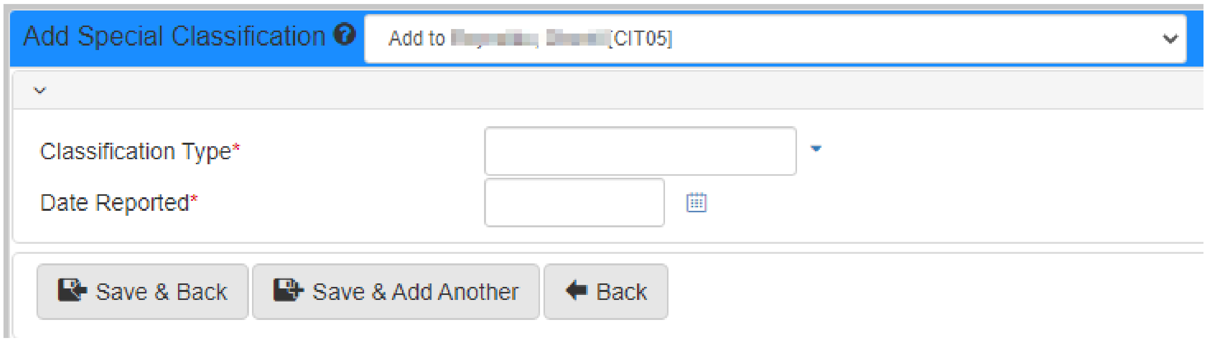
Charges



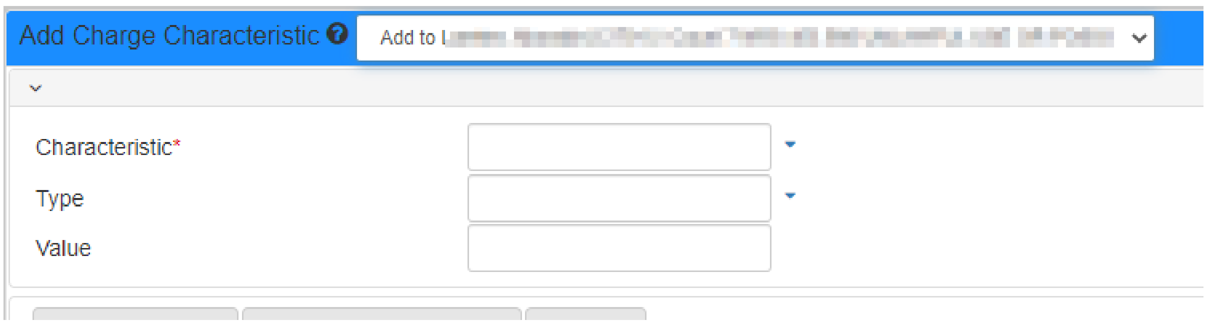
- Select **Add Charges** to add charge information to the involvement.



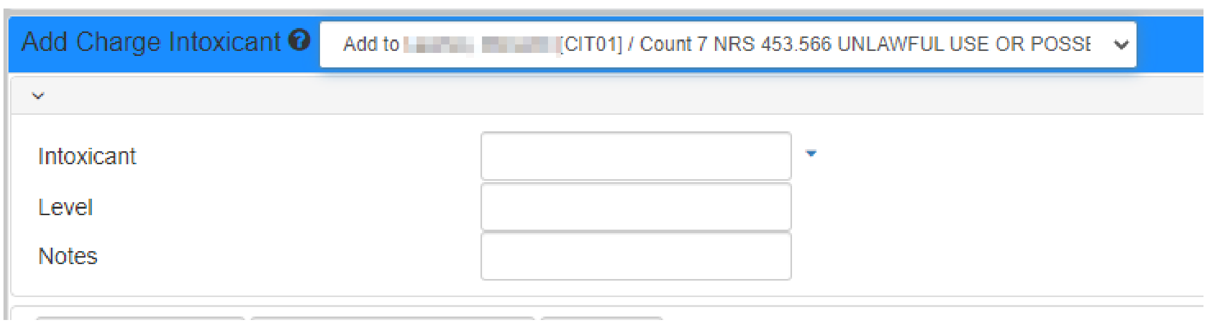
- Select **Add Plea Offer** to add plea offer information to the involvement.



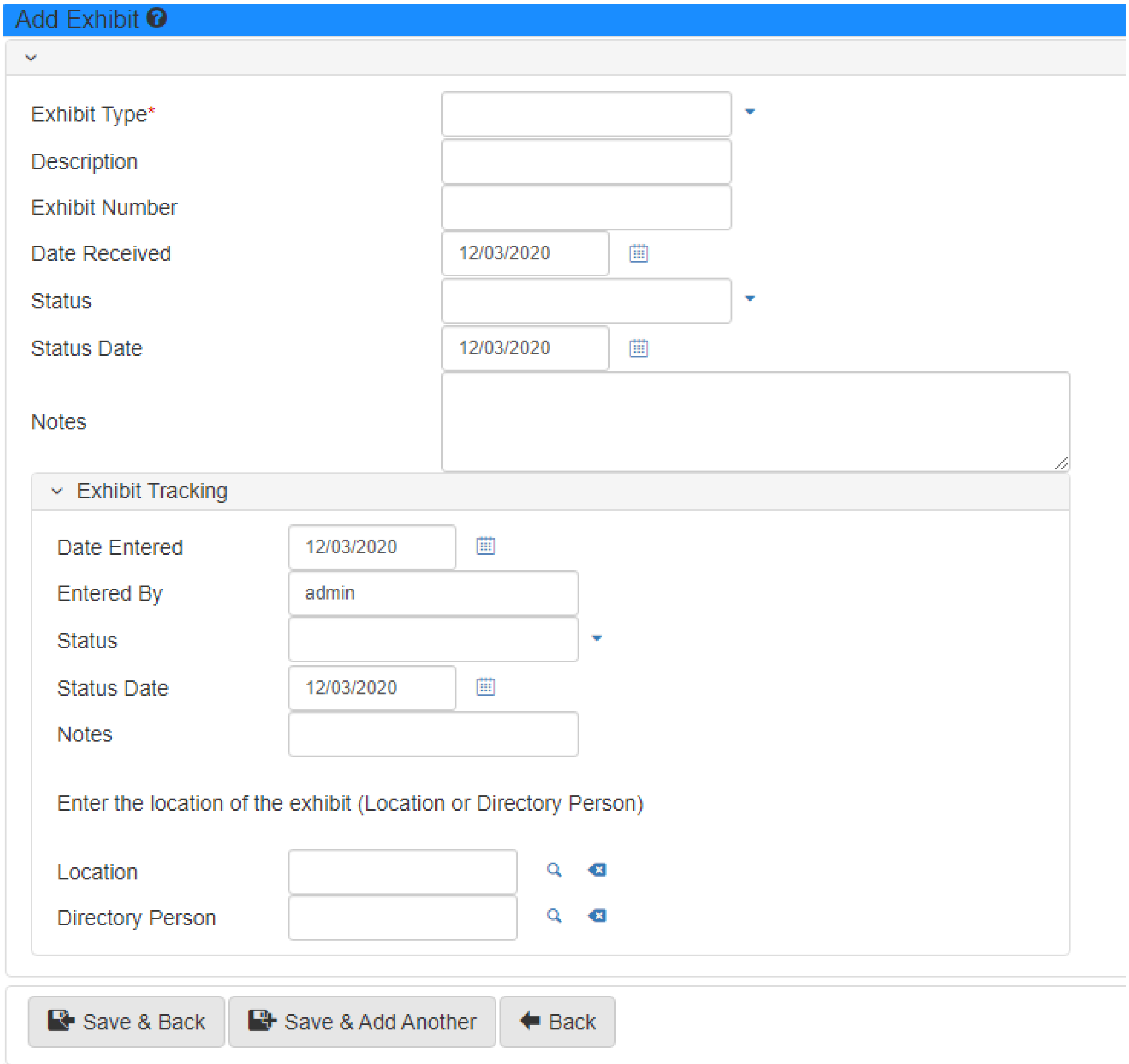
- Select **Add Charge Characteristic** to add a **Case** charge characteristic, like **Misdemeanor** or **Felony**.



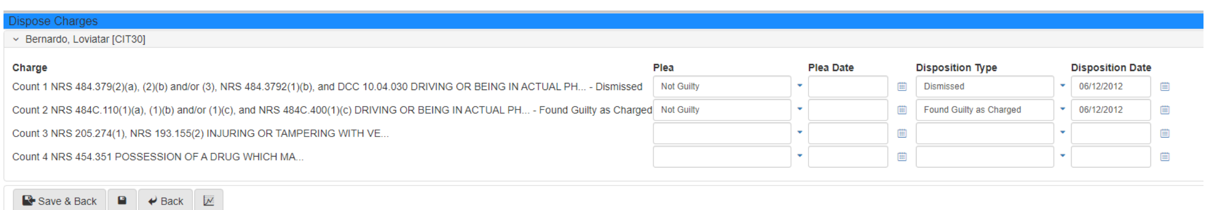
- Select **Add Charge Intoxicant** to add an intoxicant to the selected individual.



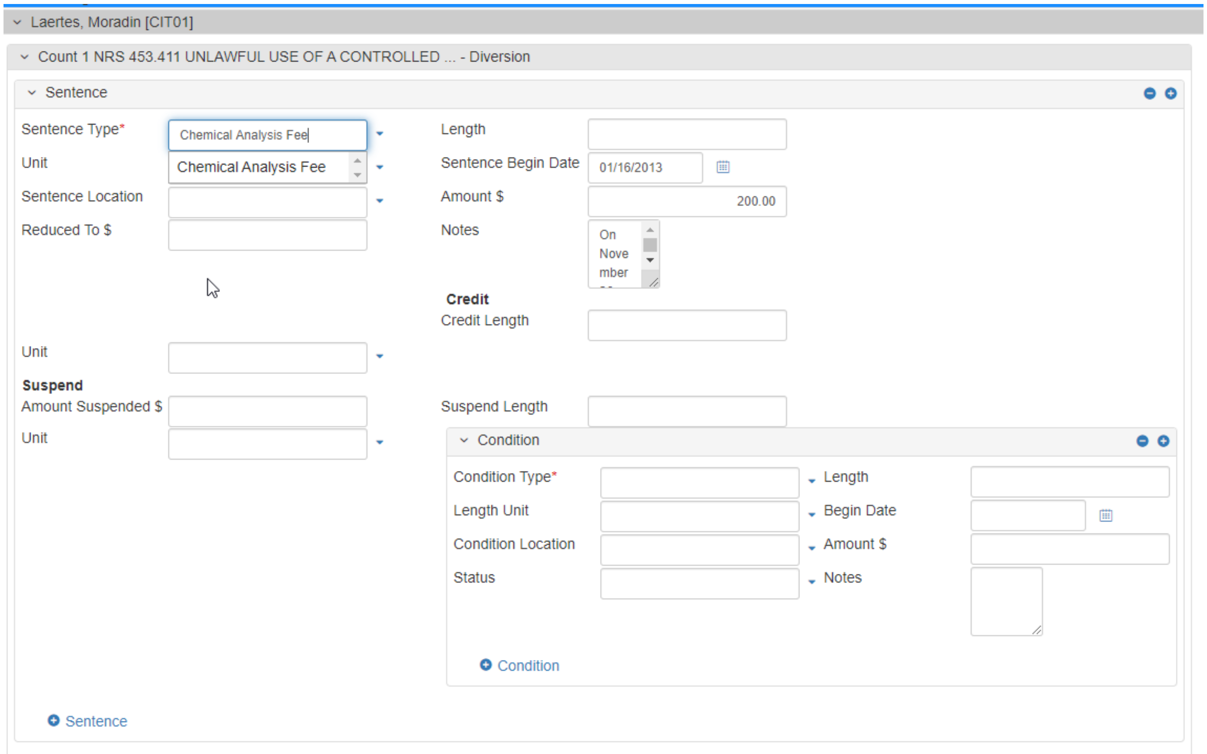
- Select **Add Exhibit** to document and track history.



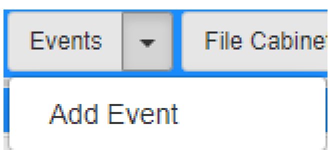
- Select **Dispose Charges** to dispose charges. Select the **Plea** and **Disposition Type** for each charge to dispose.



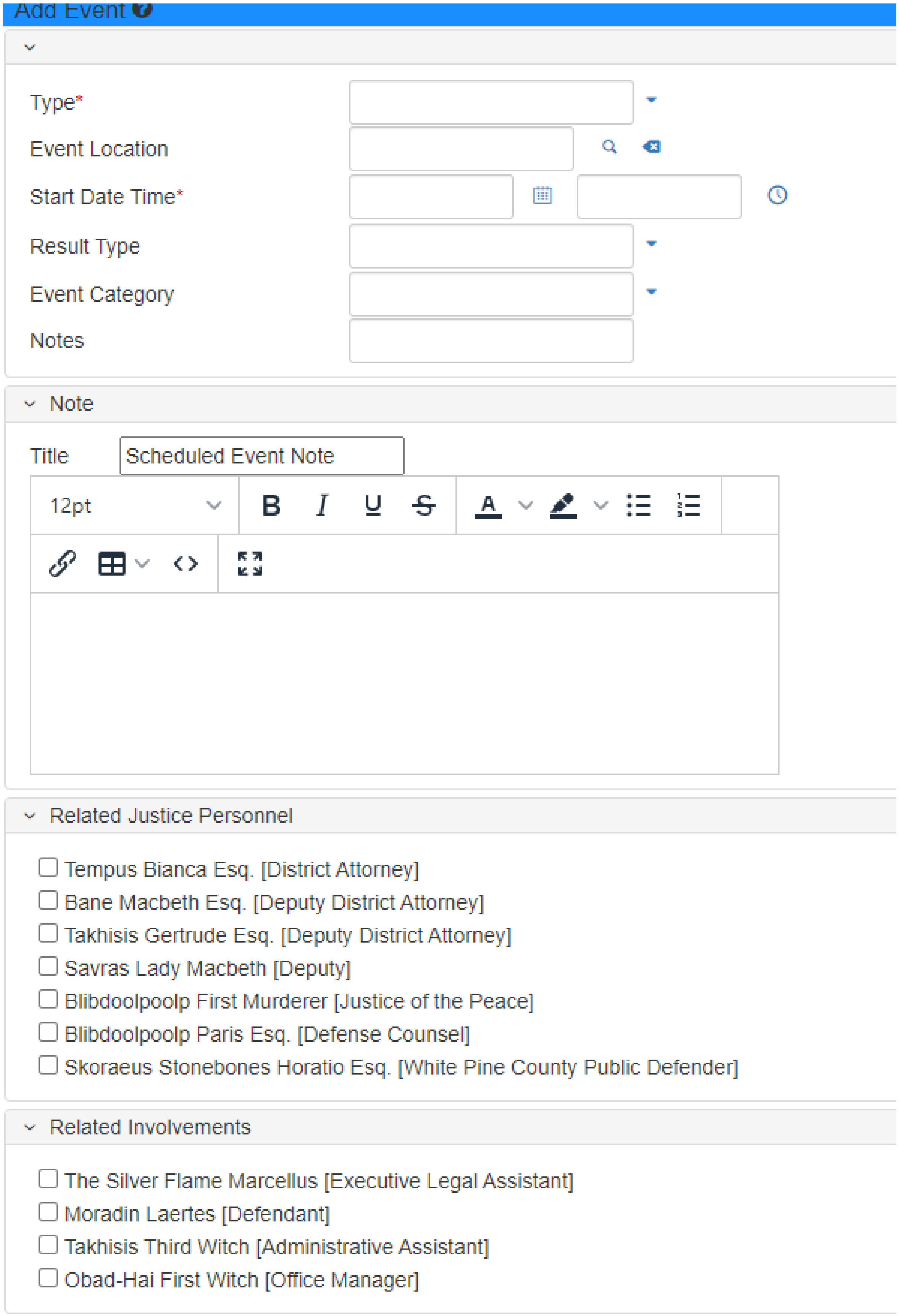
- Select **Sentencing** to add a sentence to a charge, organized by count.



Events



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



Add Event

Type*

Event Location

Start Date Time*

Result Type

Event Category

Notes

Note

Title Scheduled Event Note

12pt

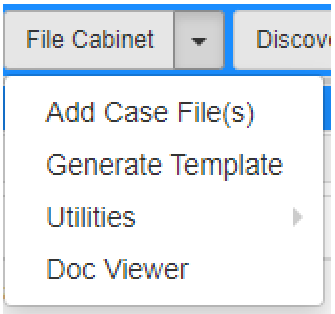
Related Justice Personnel

- [ ] Tempus Bianca Esq. [District Attorney]
- [ ] Bane Macbeth Esq. [Deputy District Attorney]
- [ ] Takhisis Gertrude Esq. [Deputy District Attorney]
- [ ] Savras Lady Macbeth [Deputy]
- [ ] Blibdoolpoolp First Murderer [Justice of the Peace]
- [ ] Blibdoolpoolp Paris Esq. [Defense Counsel]
- [ ] Skoraeus Stonebones Horatio Esq. [White Pine County Public Defender]

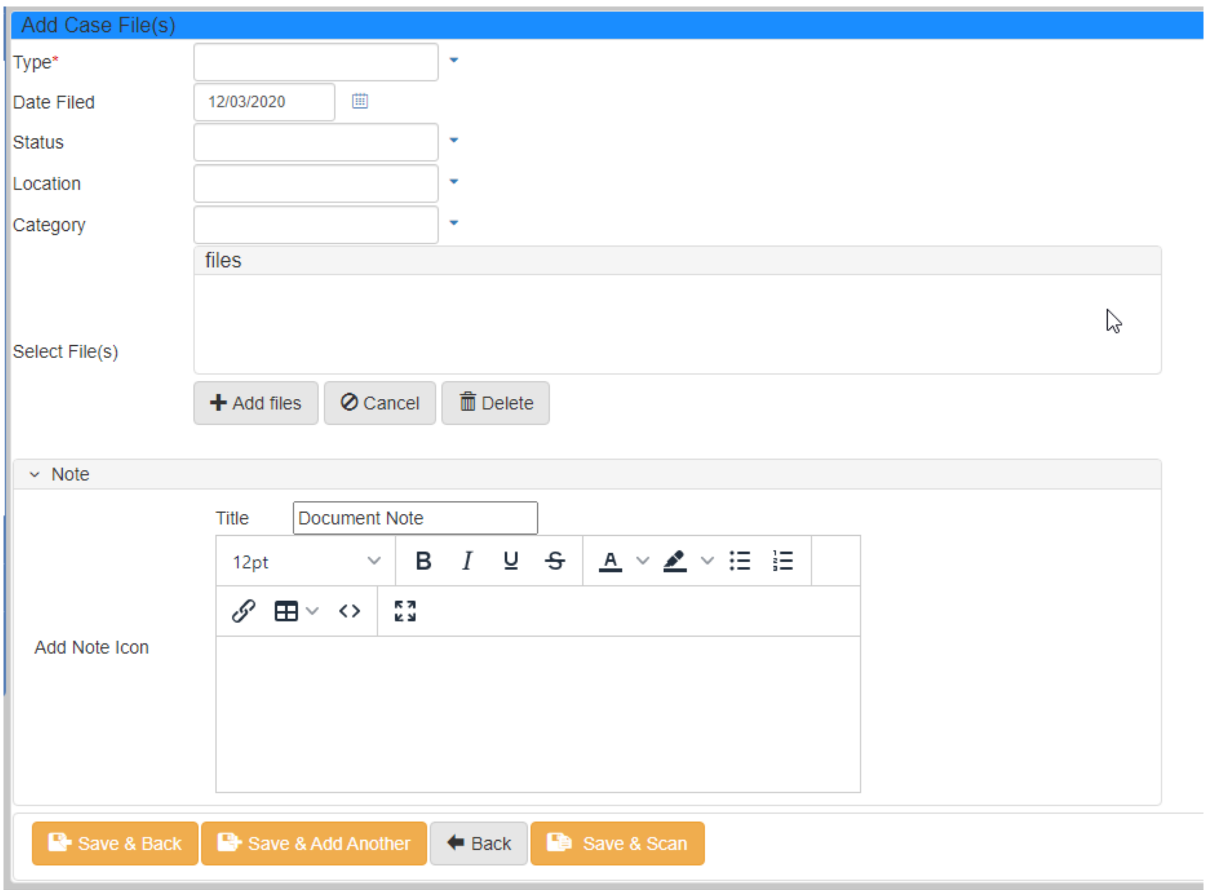
Related Involvements

- [ ] The Silver Flame Marcellus [Executive Legal Assistant]
- [ ] Moradin Laertes [Defendant]
- [ ] Takhisis Third Witch [Administrative Assistant]
- [ ] Obad-Hai First Witch [Office Manager]

File cabinet



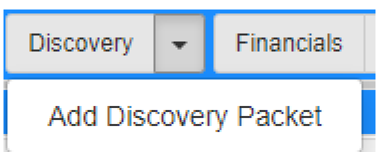
- Select **Add Case File(s)** to add files for the **Case** by uploading or choosing to scan. Notes can be added to the file at the same time.



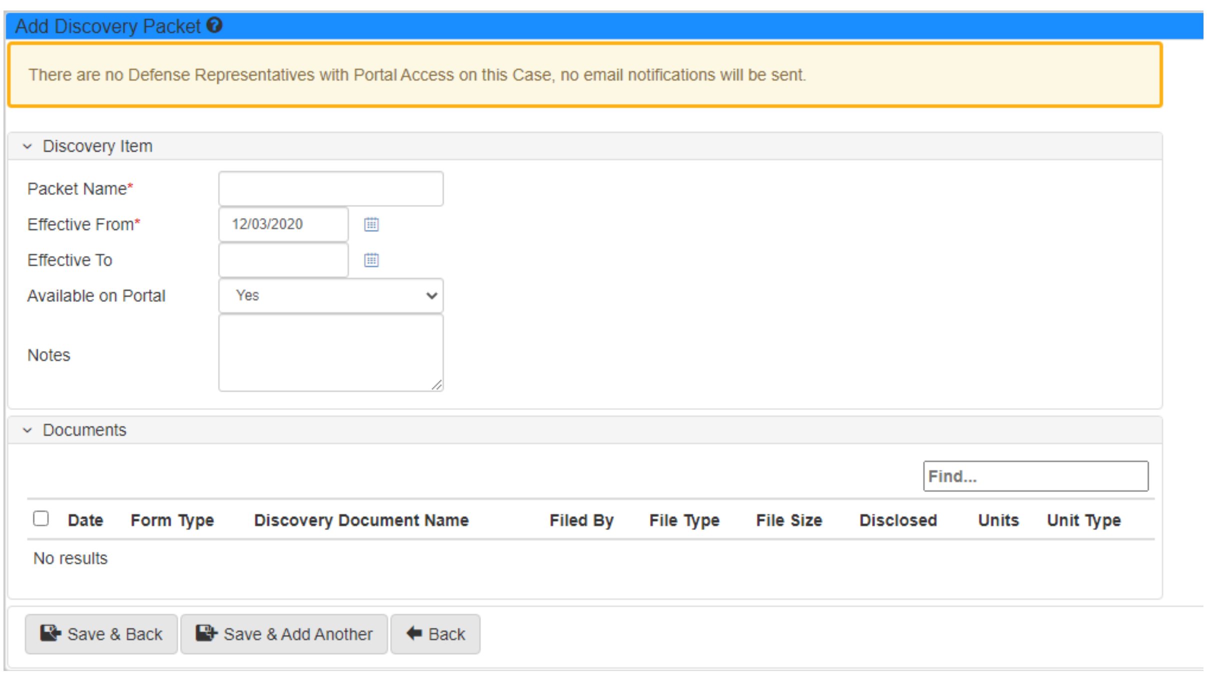
- Select **Generate template** to generate a document from a template.

- 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.

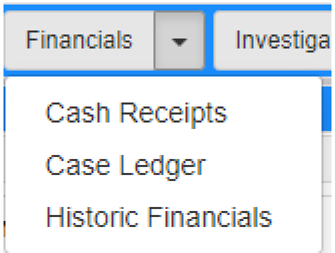
Discovery



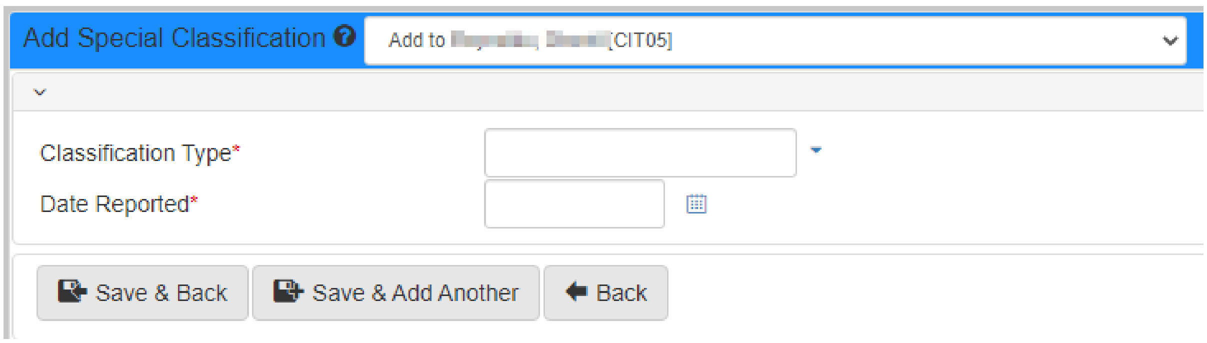
- Select **Add Discovery Packet** to add documents to a packet that can be shared for some time. Learn more about Discovery Packets and how to create them.



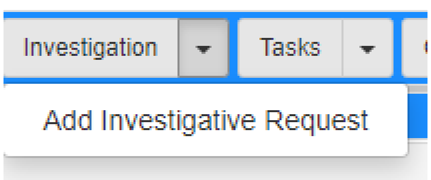
Financials



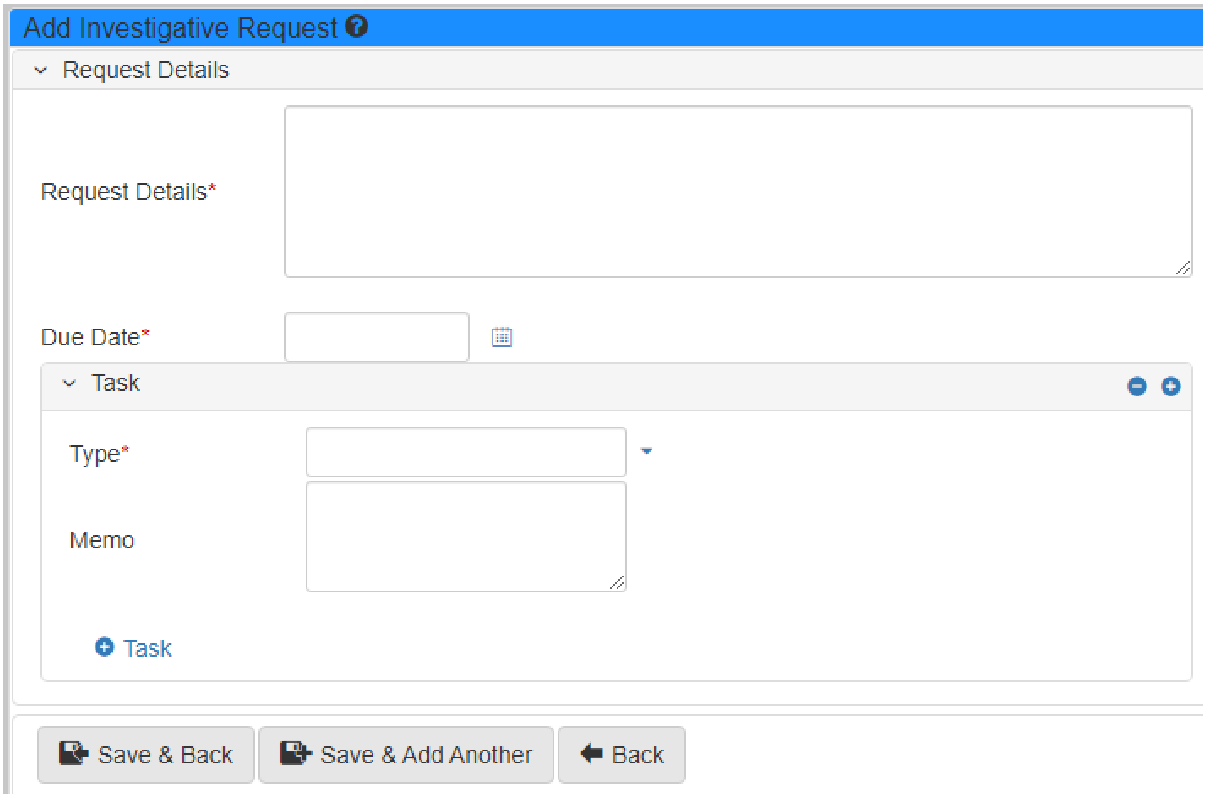
- Select **Cash Receipts** to manage the **Case** Cash Receipts.
- Select **Case Ledger** to review the Case Ledger.



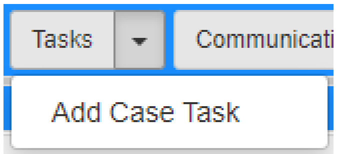
Investigation



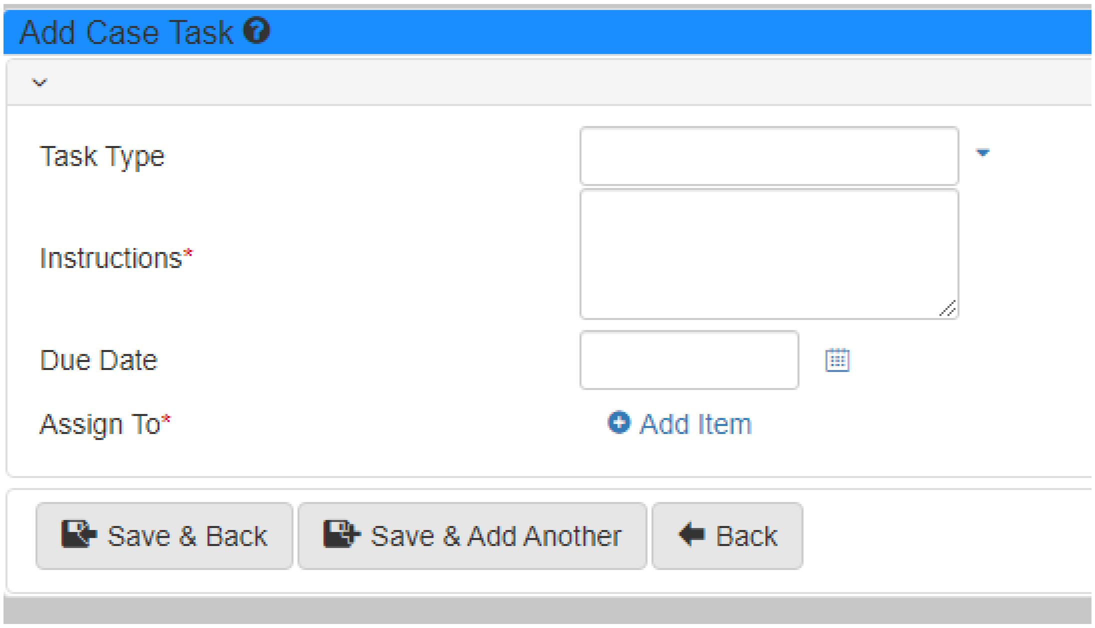
- Select **Add Investigative Request** to add an investigative request to the **Case**.



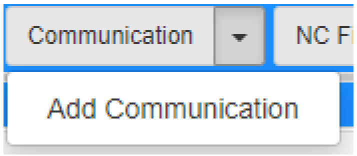
Tasks



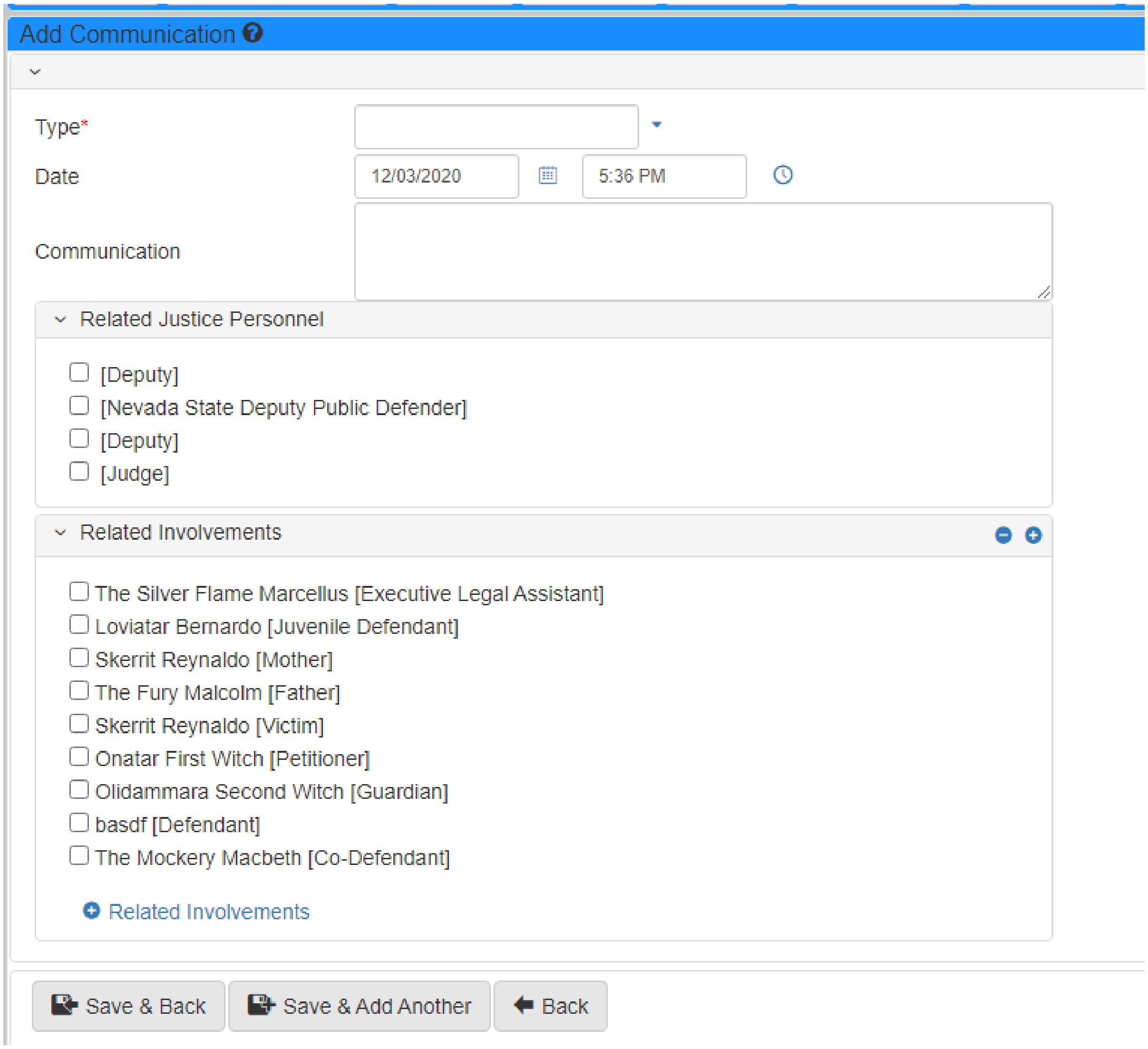
- Select **Add Case Task** to add a task to the **Case**. Case tasks show in the manual work queue for individuals added to the **Assign To** field.



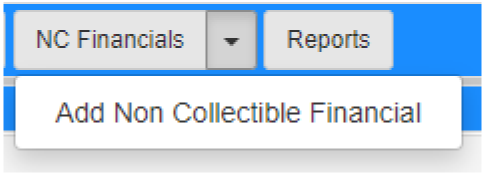
Communication



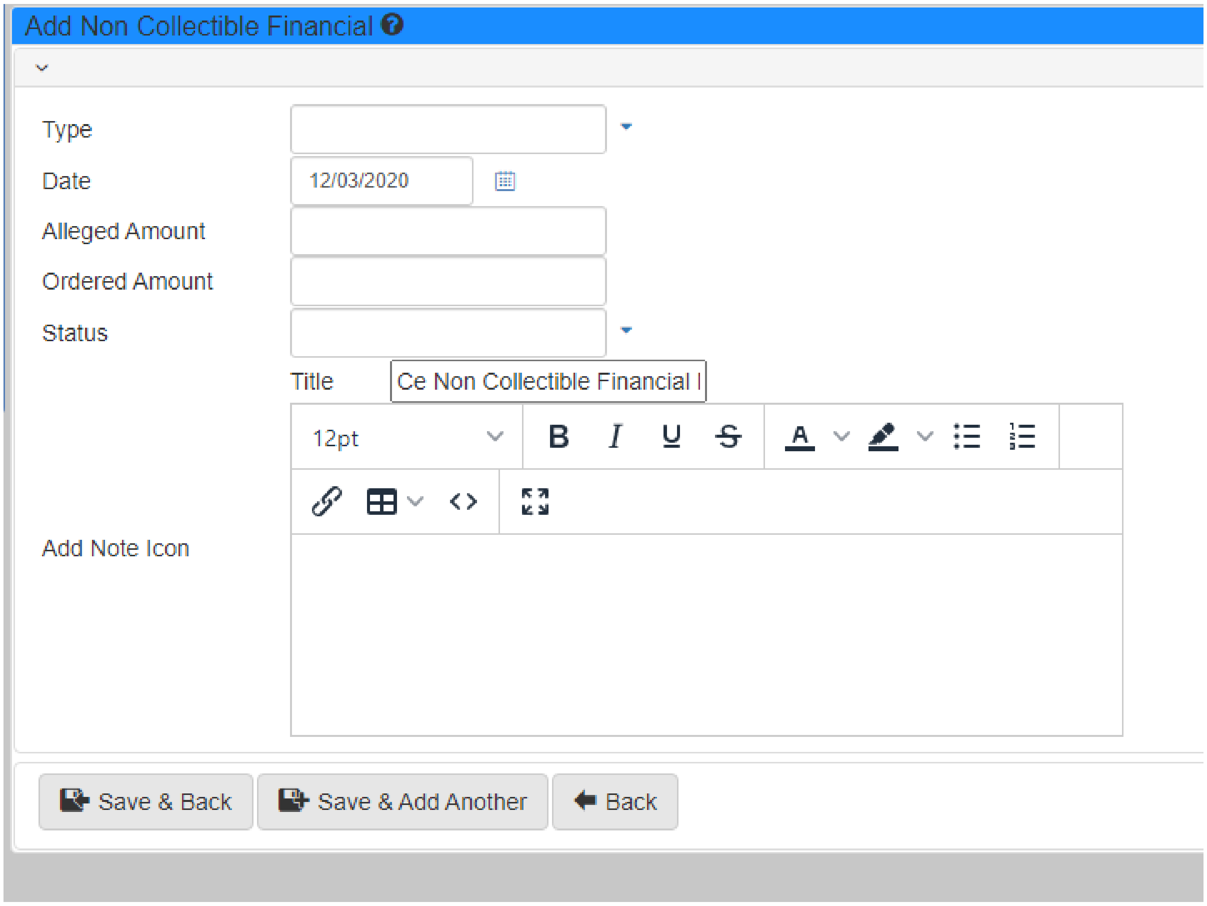
- Select **Add Communication** to document and store communication between case involvements.



Non-collectible financials



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



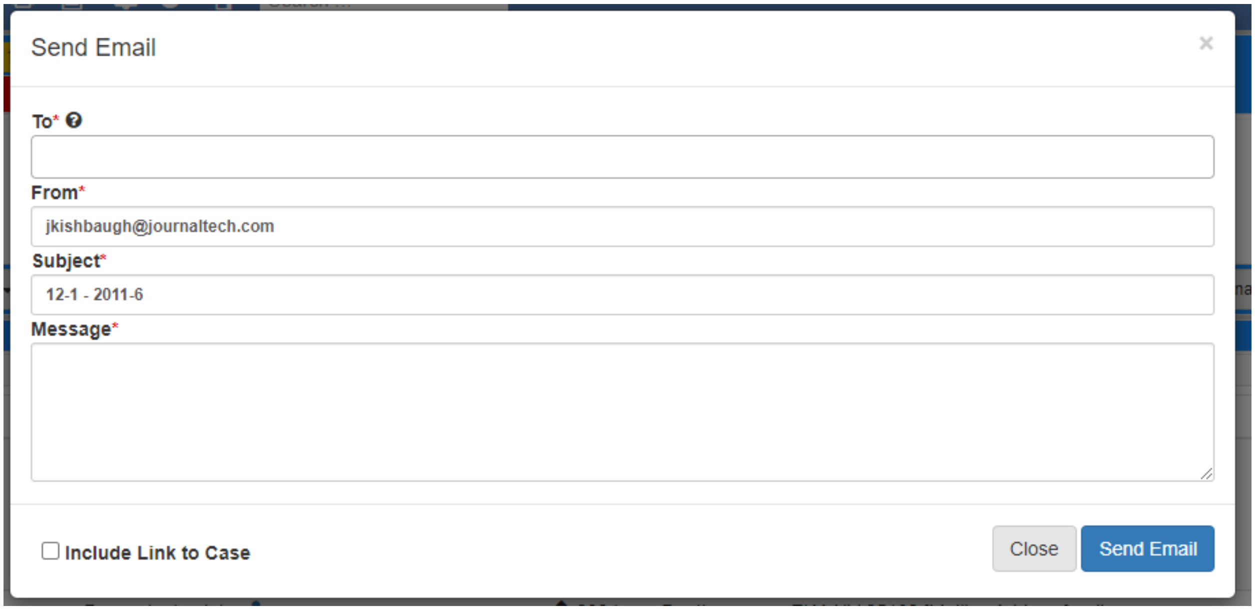
Case folder

The body of the **Case** page shows case data in panels, determined by the active tab.

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 involvements	Use the **Case Involvement Folder View** to show case information about involvements, justice personnel, and bail, and to add or edit notes for individuals on the case.
Victim	Use the **Victim Folder View** to edit **Case** victims, special victim classifications, and services provided to victims.

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

Send email widget

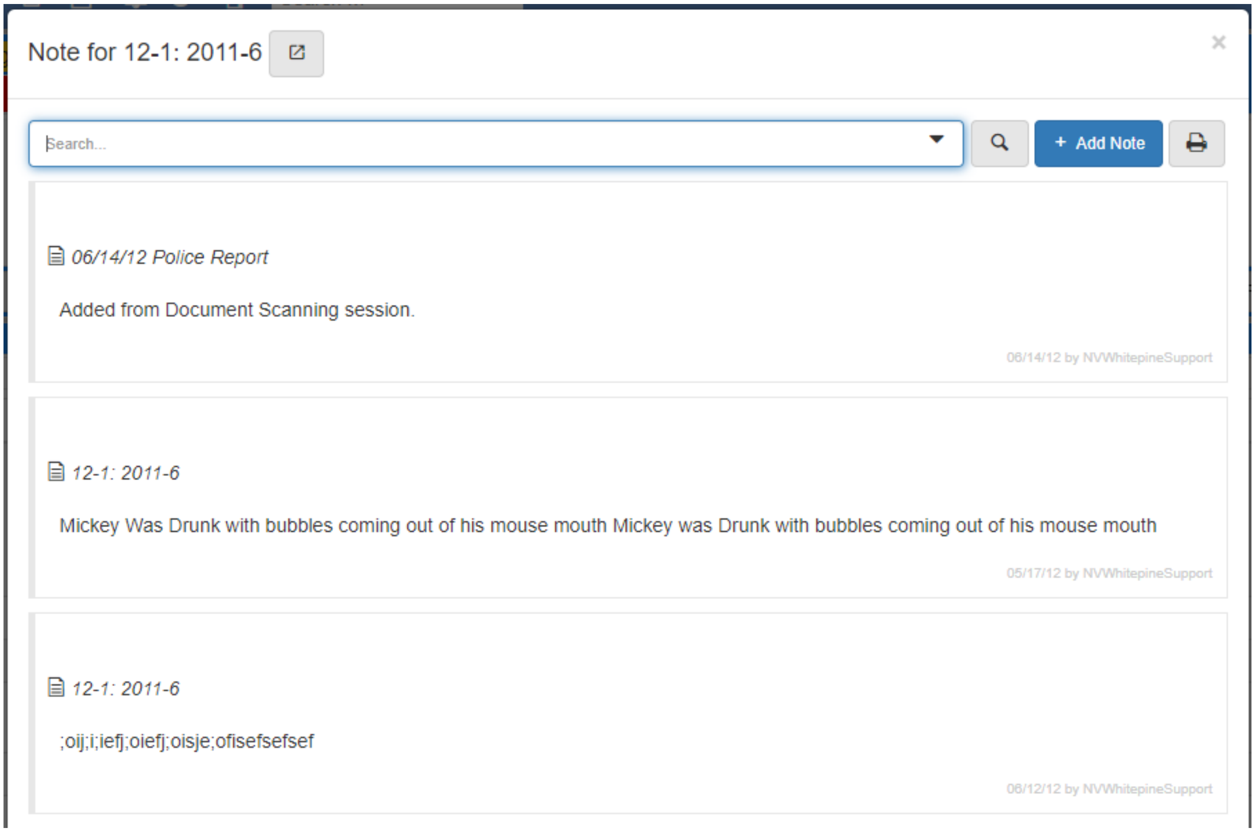


Use the **Send Email** widget to send an email regarding the **Case**. Select **Include Link to Case** to include a link to the case in the email.

Joined case widget

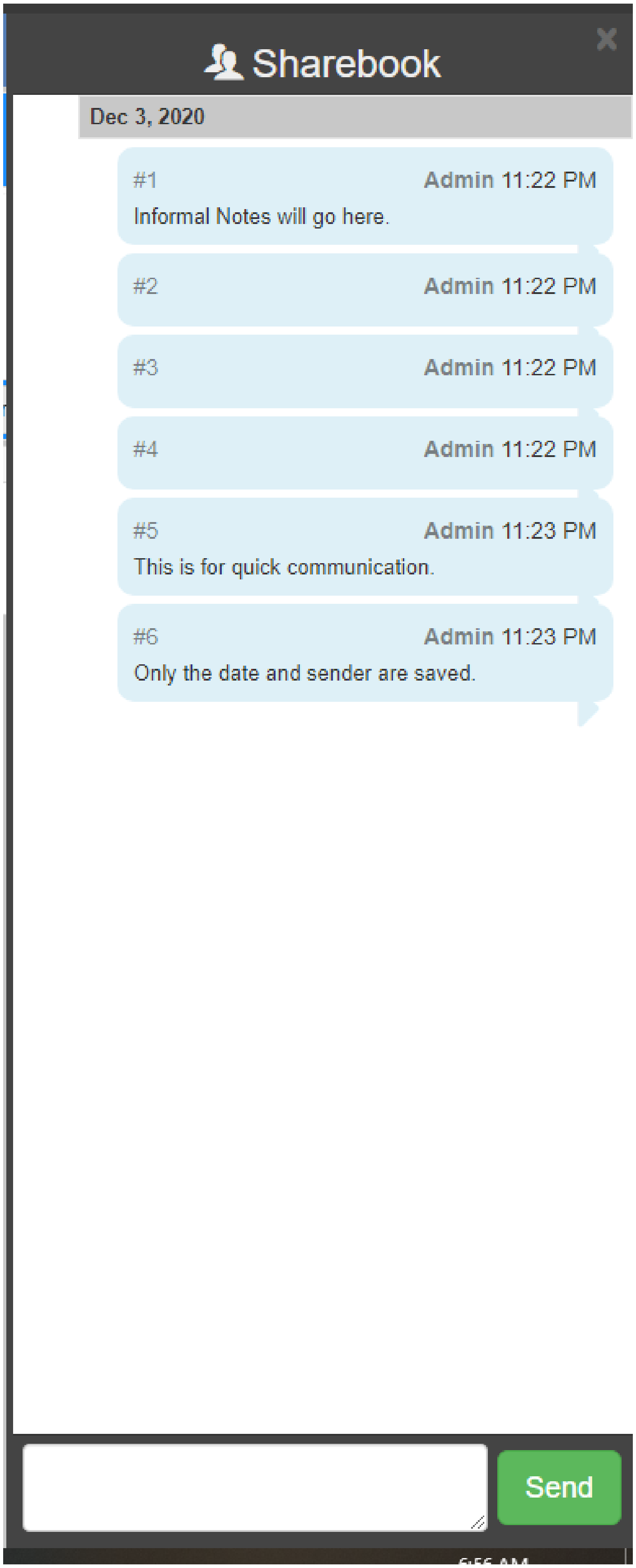
Use the **Joined Case** widget to show cases related to the current case. Click the **Case** number or title to show the lead or related cases.

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.

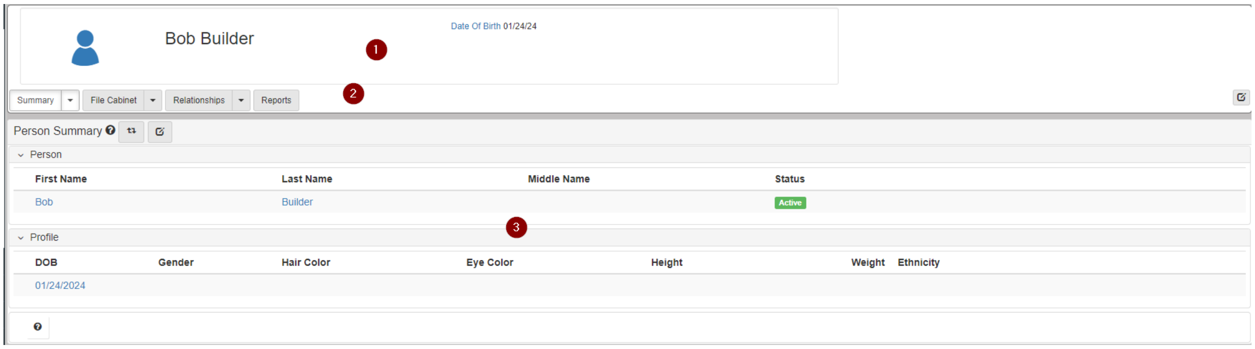
Sharebook widget


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

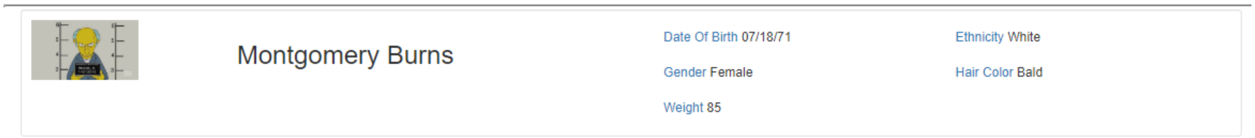
Like the Case View [https://documentation.journaltech.com/eProsecutorOnline/user/navigation/case.html], the **Person View** shows a header and a body. Use this screen to show and change all **Person** information, including involvements, contact information, and documents.



1. A header.
2. Navigation buttons.
3. Folder view.

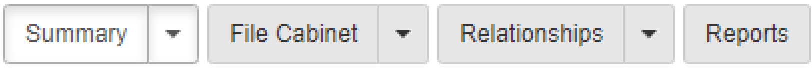
Header

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



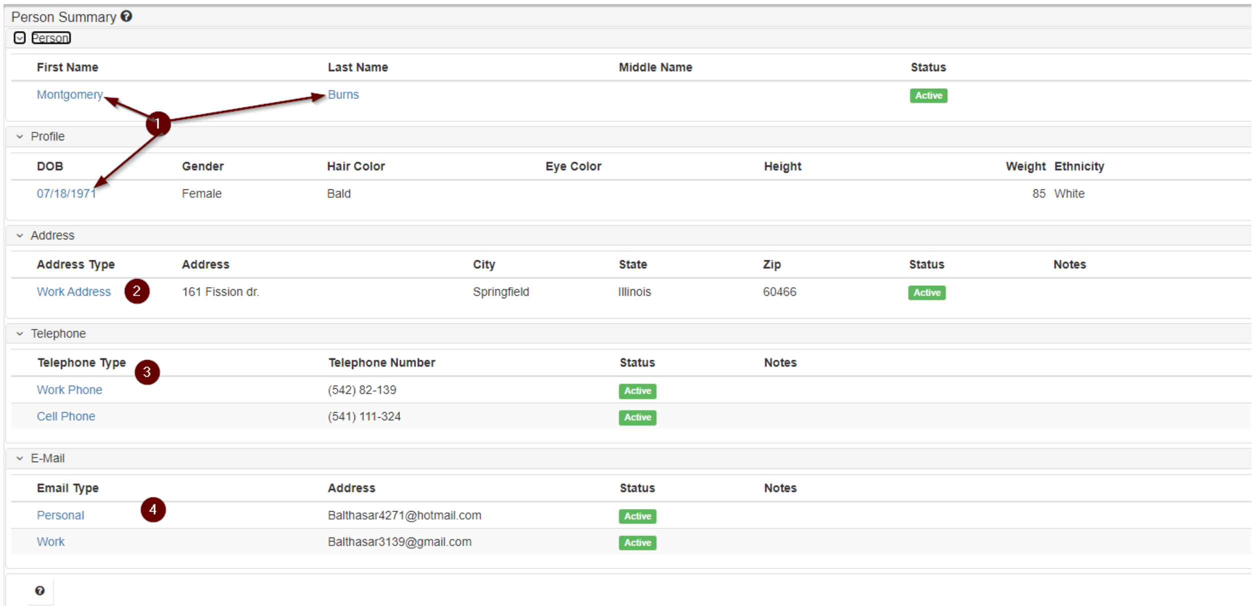
Navigation buttons

Under the header is a row of buttons. Each button, when clicked, changes the data shown in the page 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 person.

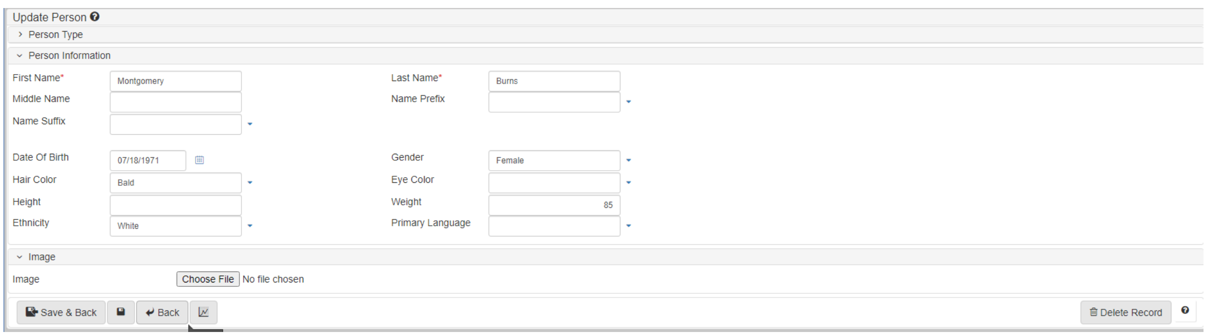


Summary

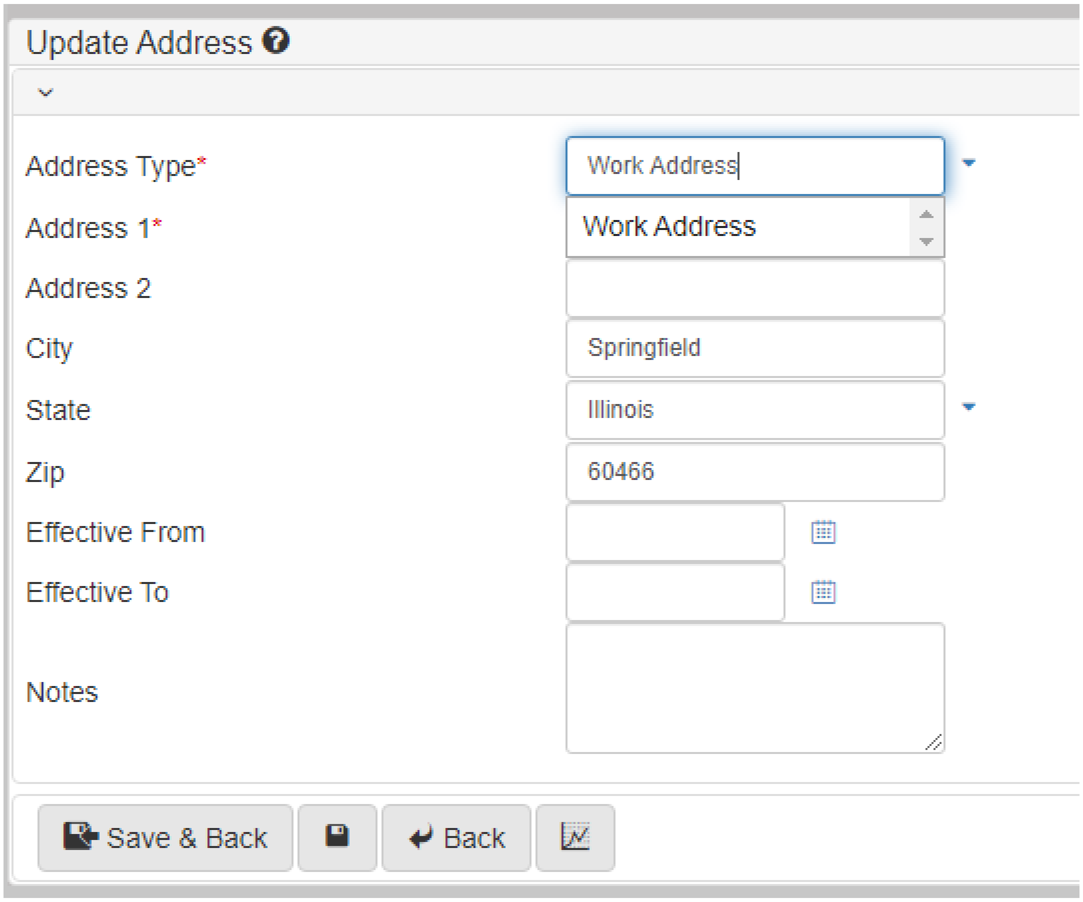
Click **[Summary]** to show the **Person Folder View**. The form shows all information associated to the selected **Person**, including links to edit the information. Refer to Person for more information.



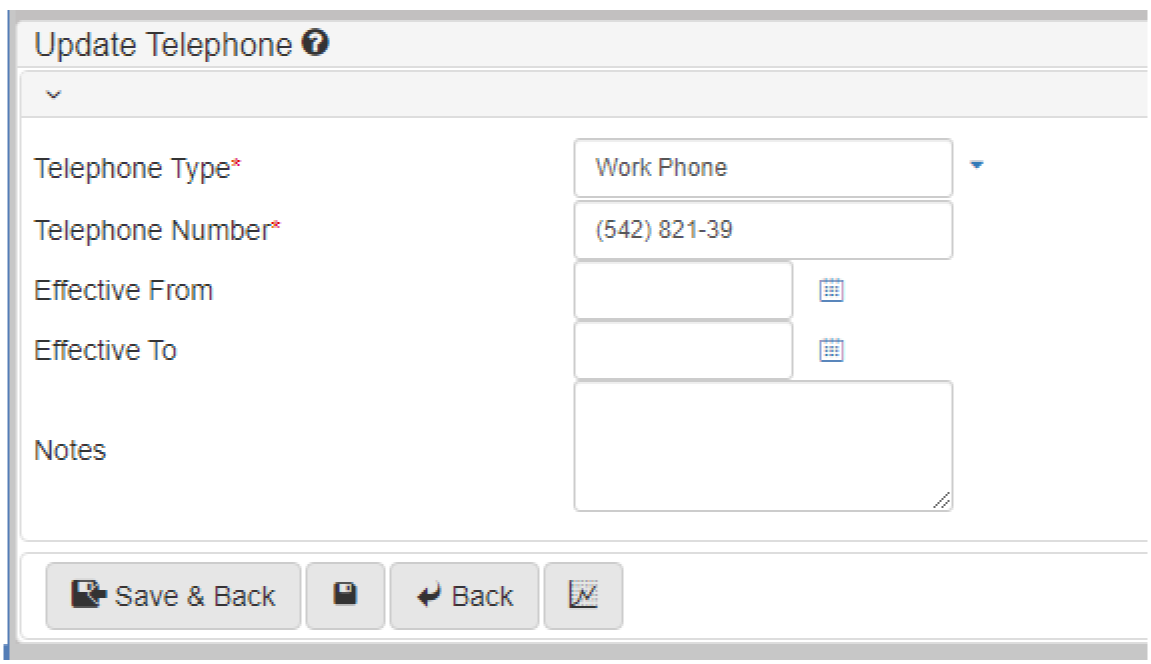
1. Click to show the **Update Person** form.



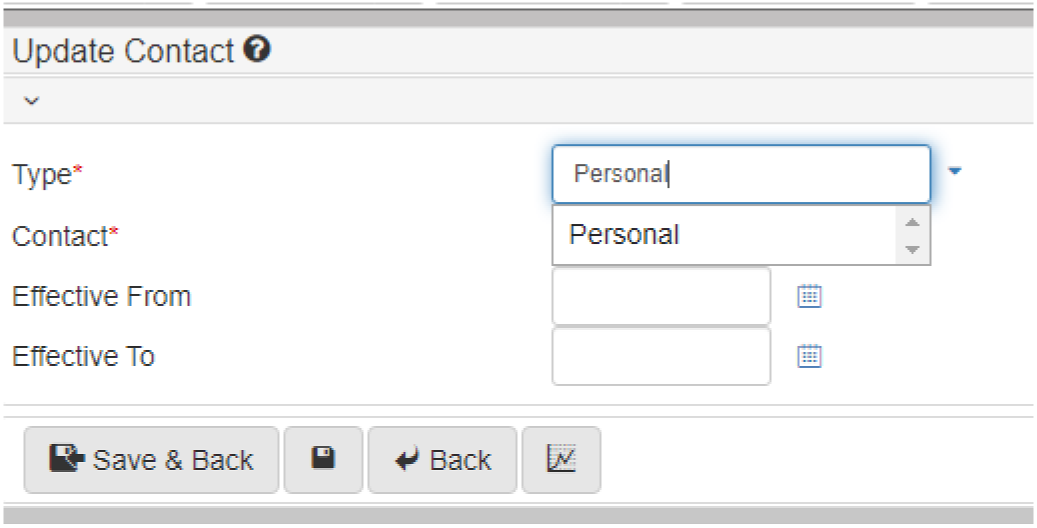
2. Click to show the **Update Address** form.



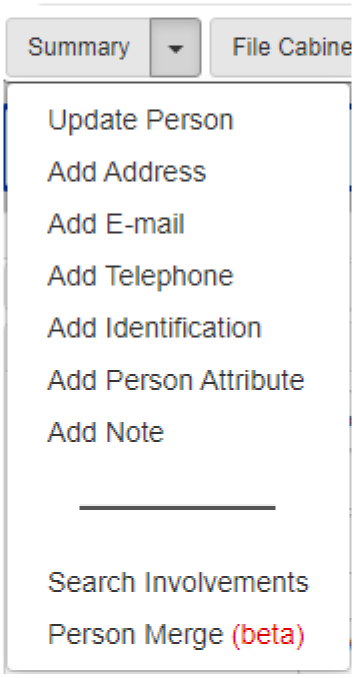
3. Click to show the **Update Telephone** form.



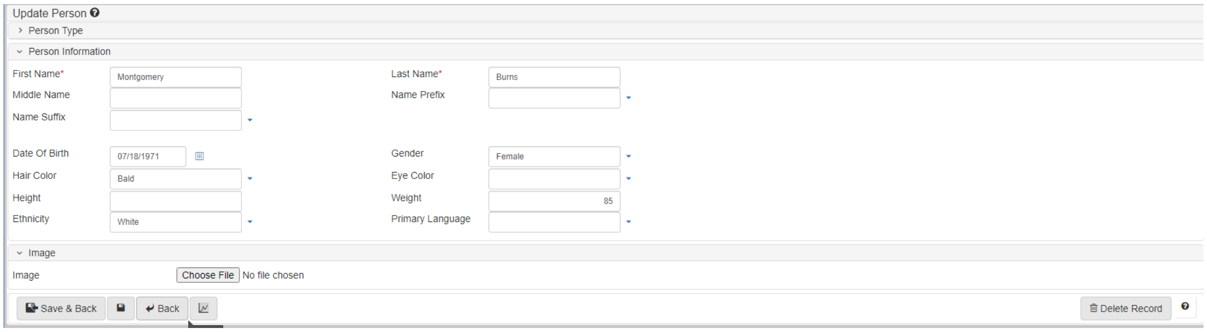
4. Click to show the **Update Email** form.



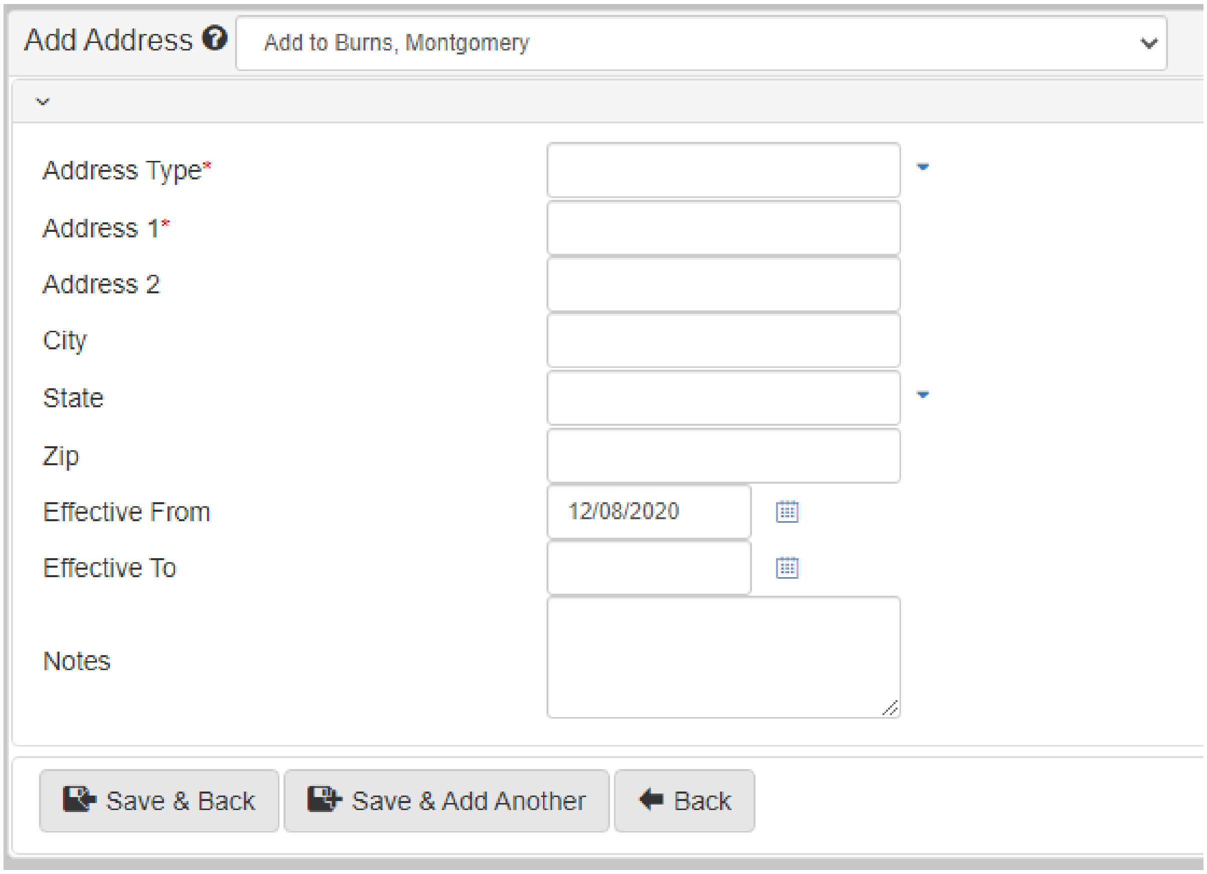
The Summary dropdown



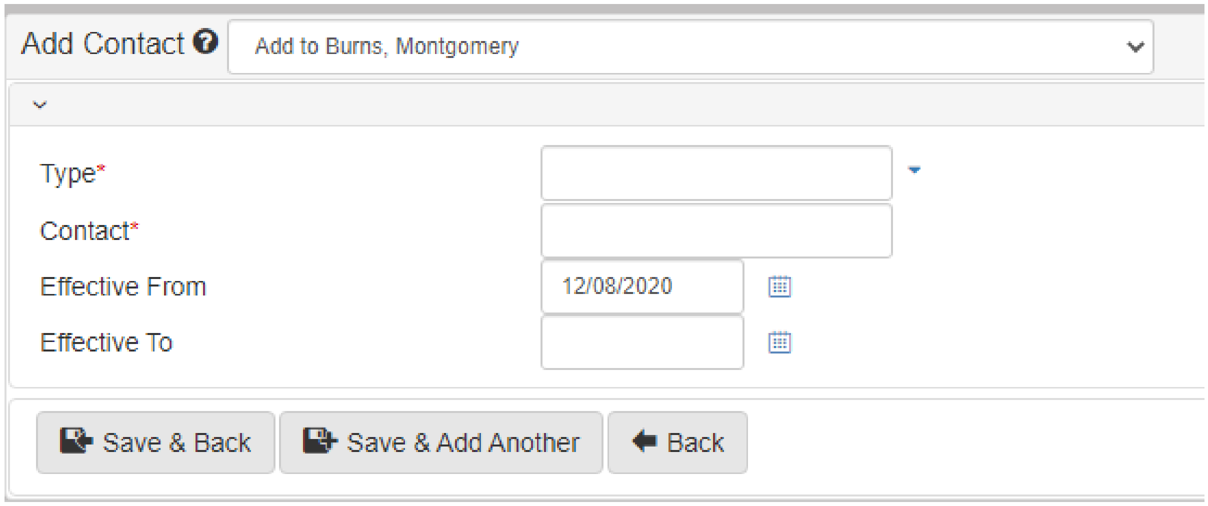
- Select **Update Person** to manage information, including name, date of birth, appearance, and a Header photo.



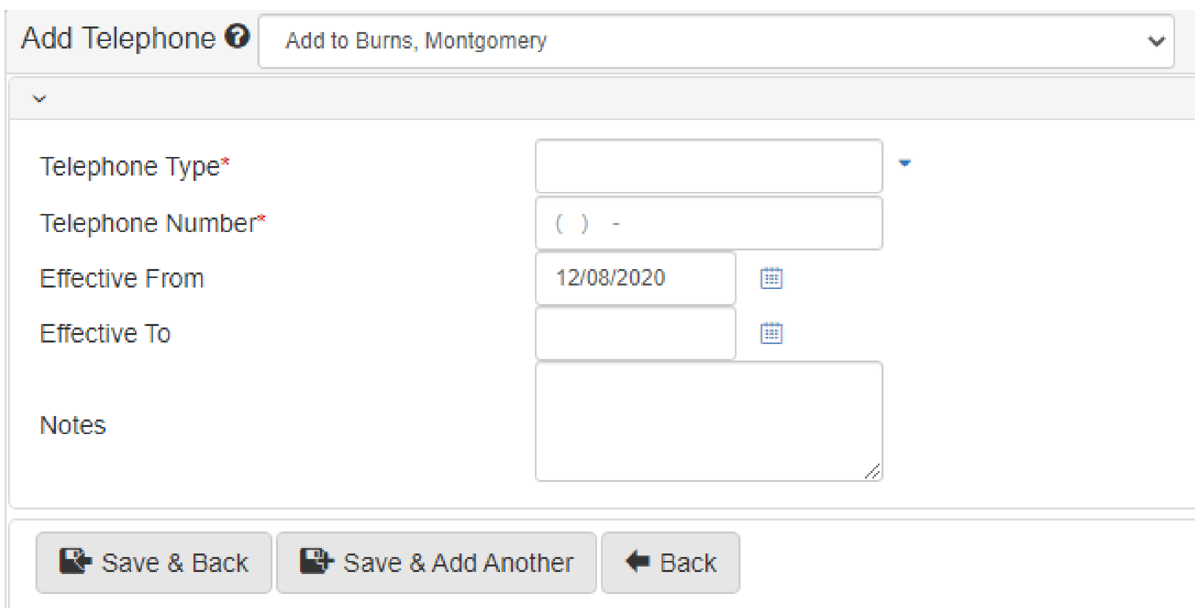
- Select **Add Address** to add an address for the **Person**.



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

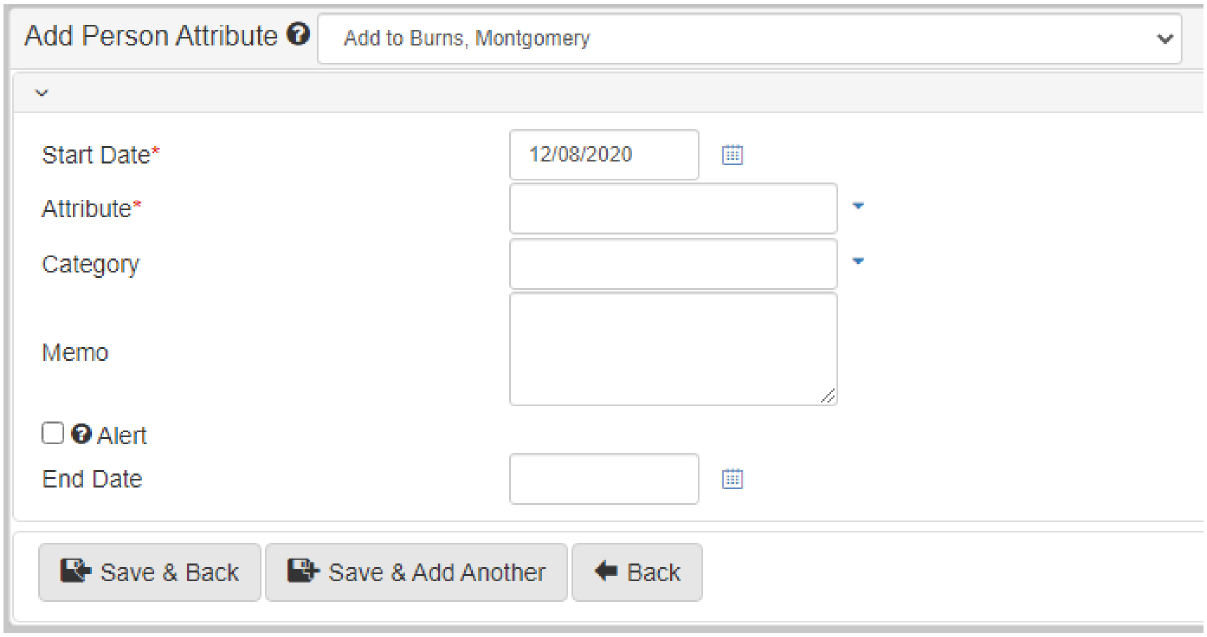


- Select **Add Telephone** to add a telephone number for the **Person**.

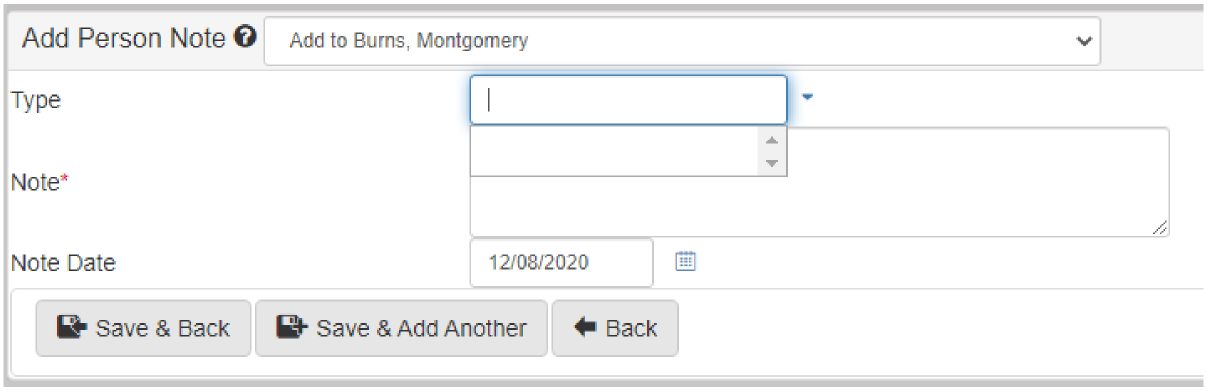


- Select **Add Identification** to add identifying documents for the **Person**.

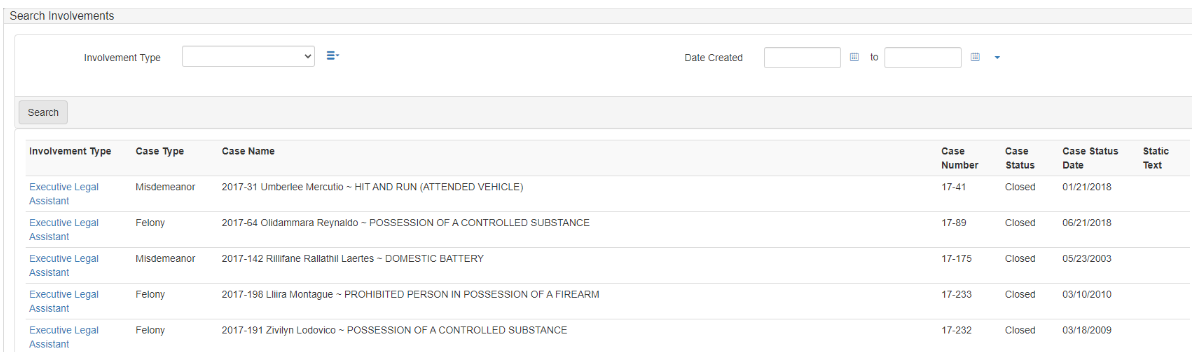
- Select **Add Person Attribute** to add descriptive attributes for the **Person**.



- 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.



Involvement Type	Case Type	Case Name	Case Number	Case Status	Case Status Date	Static Text
Executive Legal Assistant	Misdemeanor	2017-31 Umberlee Mercutio ~ HIT AND RUN (ATTENDED VEHICLE)	17-41	Closed	01/21/2018	
Executive Legal Assistant	Felony	2017-64 Olidammara Reynaldo ~ POSSESSION OF A CONTROLLED SUBSTANCE	17-89	Closed	06/21/2018	
Executive Legal Assistant	Misdemeanor	2017-142 Rillifane Rallathil Laertes ~ DOMESTIC BATTERY	17-175	Closed	05/23/2003	
Executive Legal Assistant	Felony	2017-198 Lliira Montague ~ PROHIBITED PERSON IN POSSESSION OF A FIREARM	17-233	Closed	03/10/2010	
Executive Legal Assistant	Felony	2017-191 Zivilyn Lodovico ~ POSSESSION OF A CONTROLLED SUBSTANCE	17-232	Closed	03/18/2009	

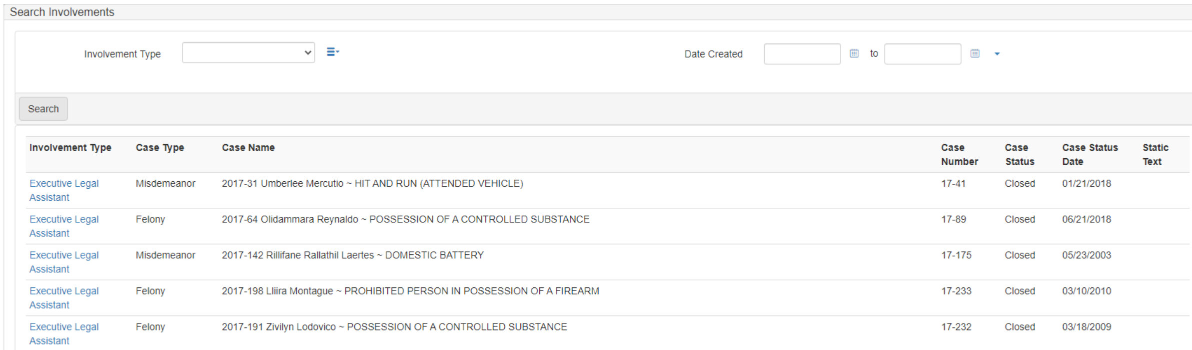
- Select **Person Merge (beta)** to Merge.

File cabinet

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

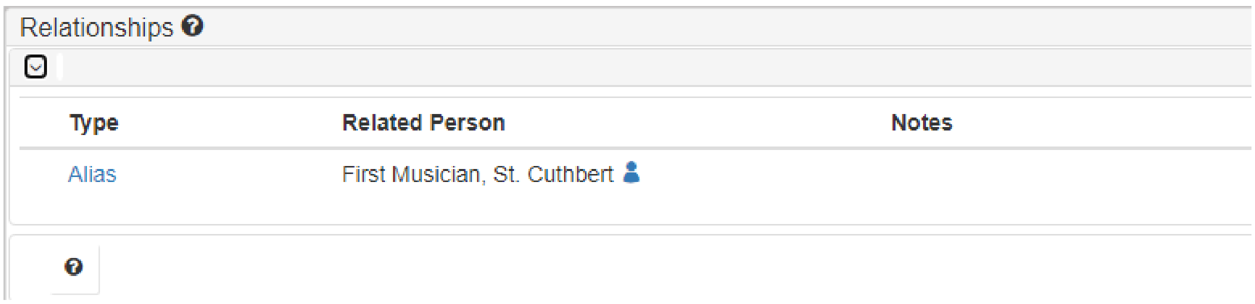
The File Cabinet dropdown

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

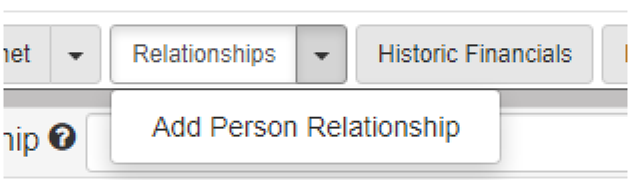


Relationships

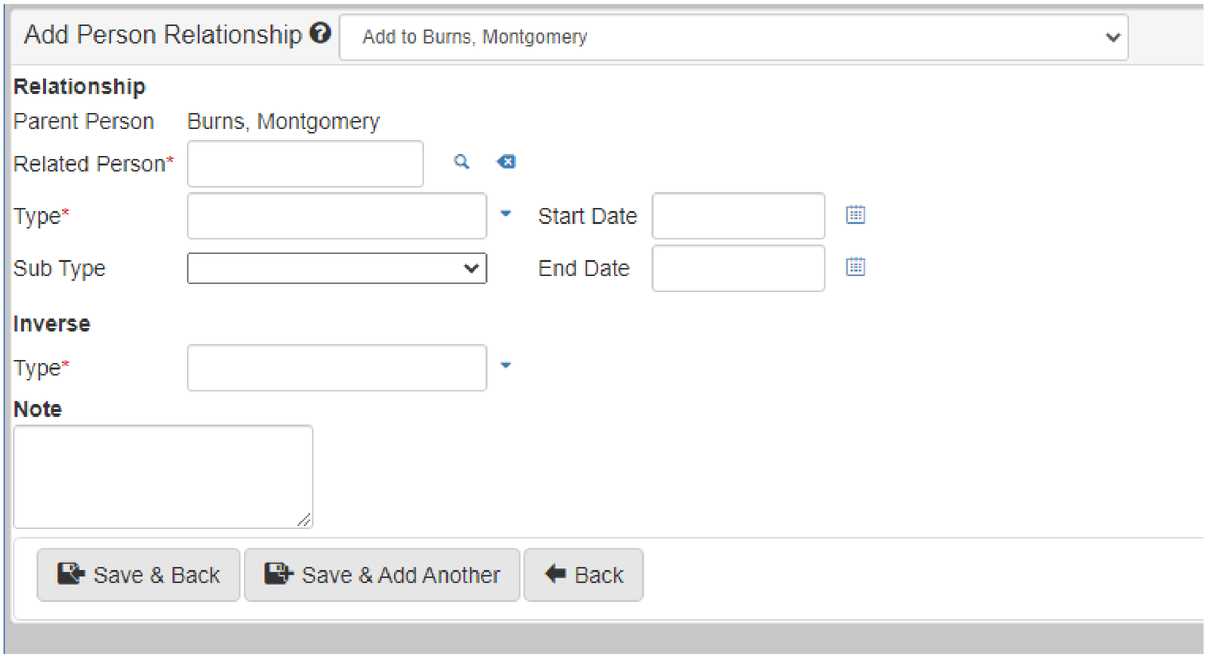
The **Relationship Folder View** shows all relationships of the selected person and allows for quick editing by clicking a relationship. Refer to Relationships for more information.



The Relationships dropdown



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



Person folder

The body of the **Person** page shows data in panels, determined by the active tab.

Tab	Description
Person summary	The **Person Folder** shows:
File cabinet	Use the **File Cabinet Folder View** to show **Person** documents.
Relationships	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 **Person Summary** report by default. Other reports can be selected in the dropdown.

Using links

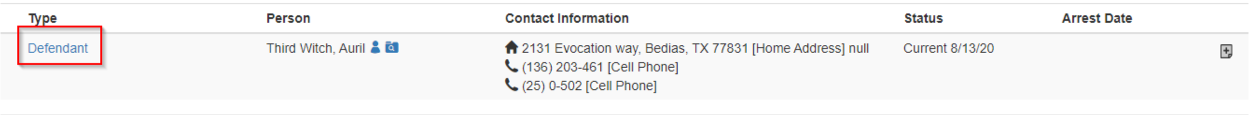
This section describes two different ways that links work in eProsecutor Online:

- https://documentation.journaltech.com/eProsecutorOnline/user/links/icons.html:
- https://documentation.journaltech.com/eProsecutorOnline/user/links/update_screens.html:

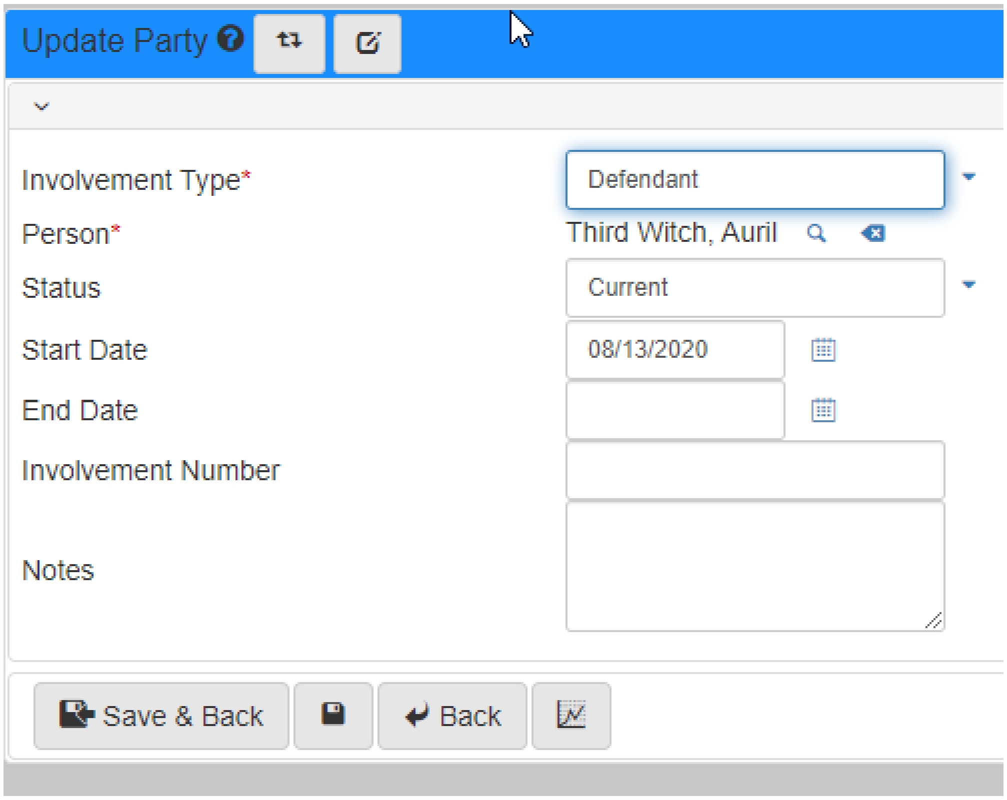
Update screens

Update screen hyperlinks

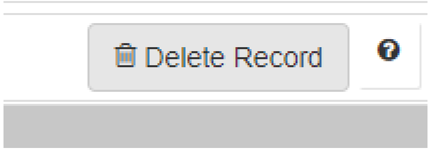
Links in a folder screen open the **Update** screen for that row of data. For example, clicking the **Defendant** link opens the **Update** screen for that party record.



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.



Icon links

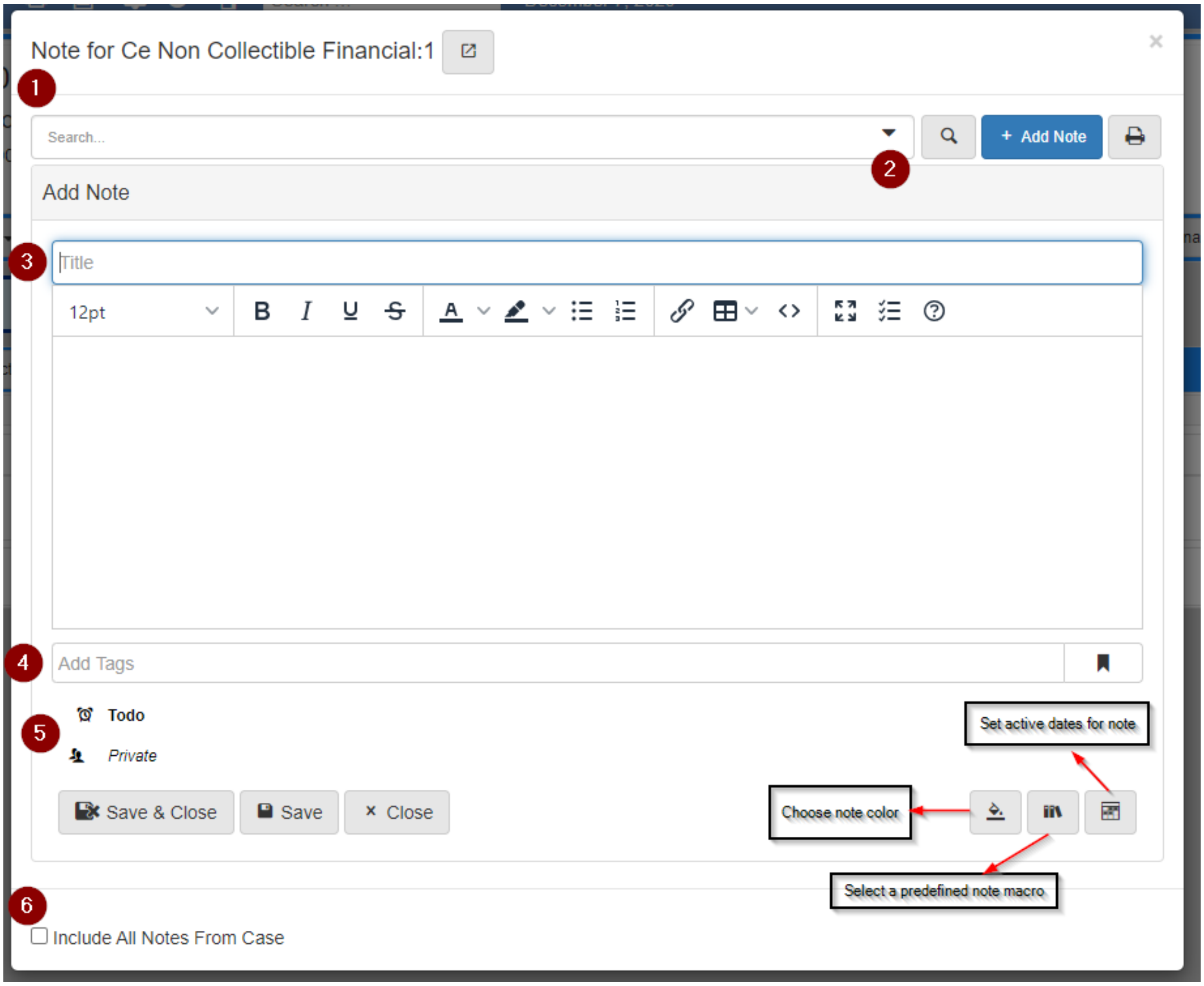
Hovering over an icon link shows a tooltip indicating the icon click action.

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.

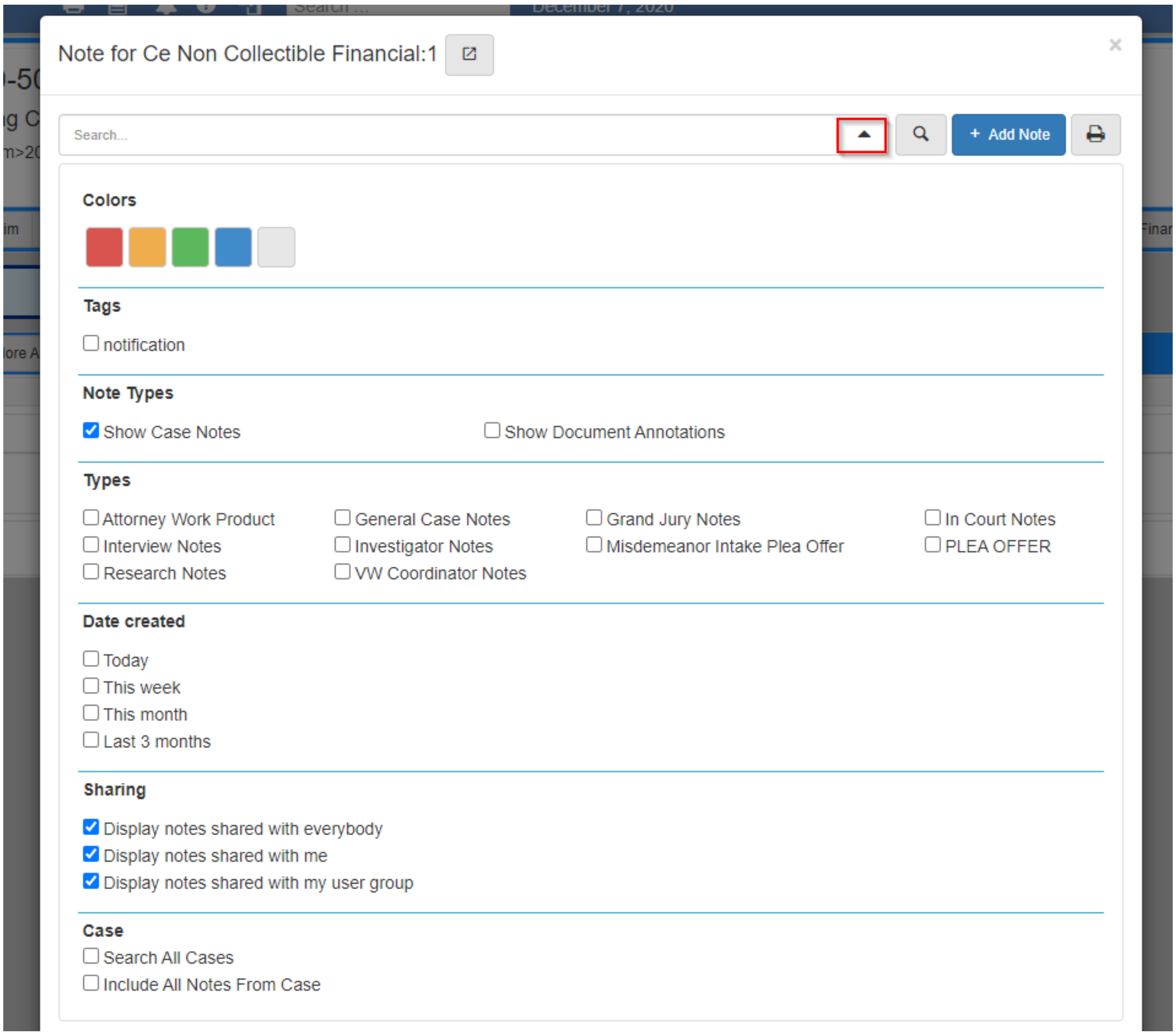


1. Enter a search term here to find notes associated with the record.
2. Click the dropdown to toggle the Advanced Note Search.
3. Enter the case note type and body with text document formatting options.

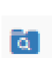
4. Use the field to add new or existing tags to notes.
5. Create a to-do item for an assignee and set sharing rights for the note.
6. Select **Include All Notes From Case** to show a list of all case notes in the popup window.
7. Select a note color.
8. Select a note macro.

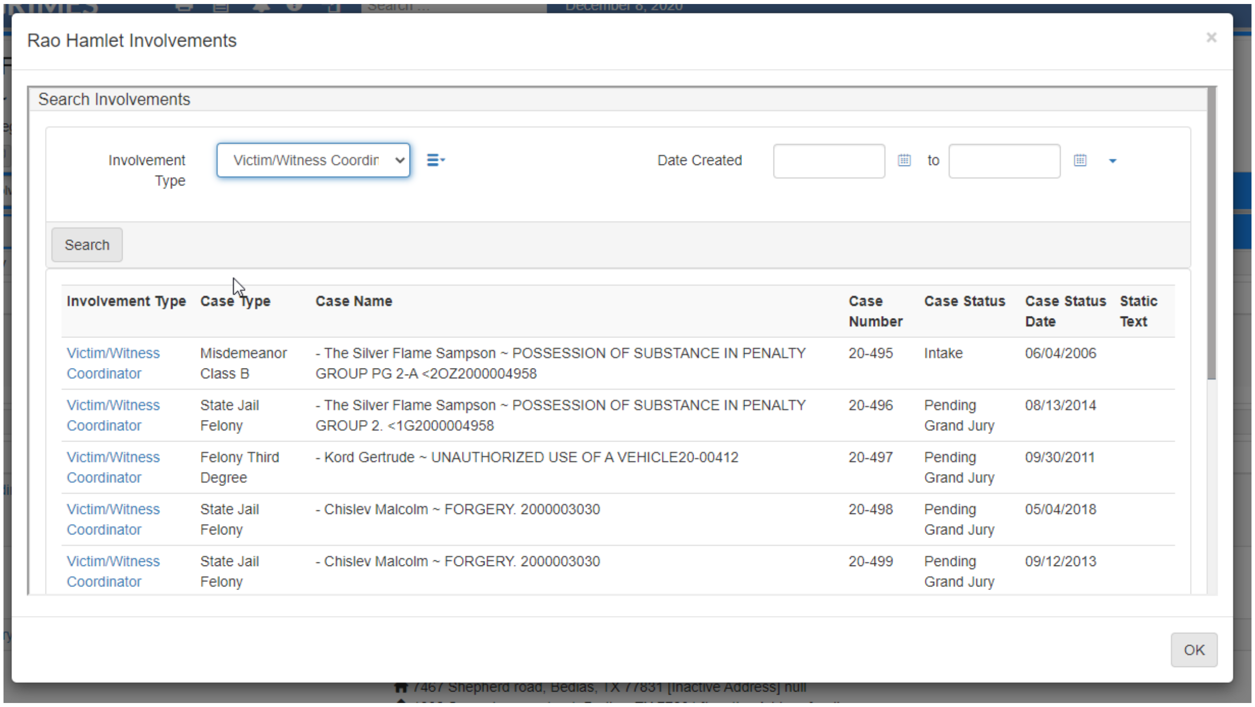
Advanced note search

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.



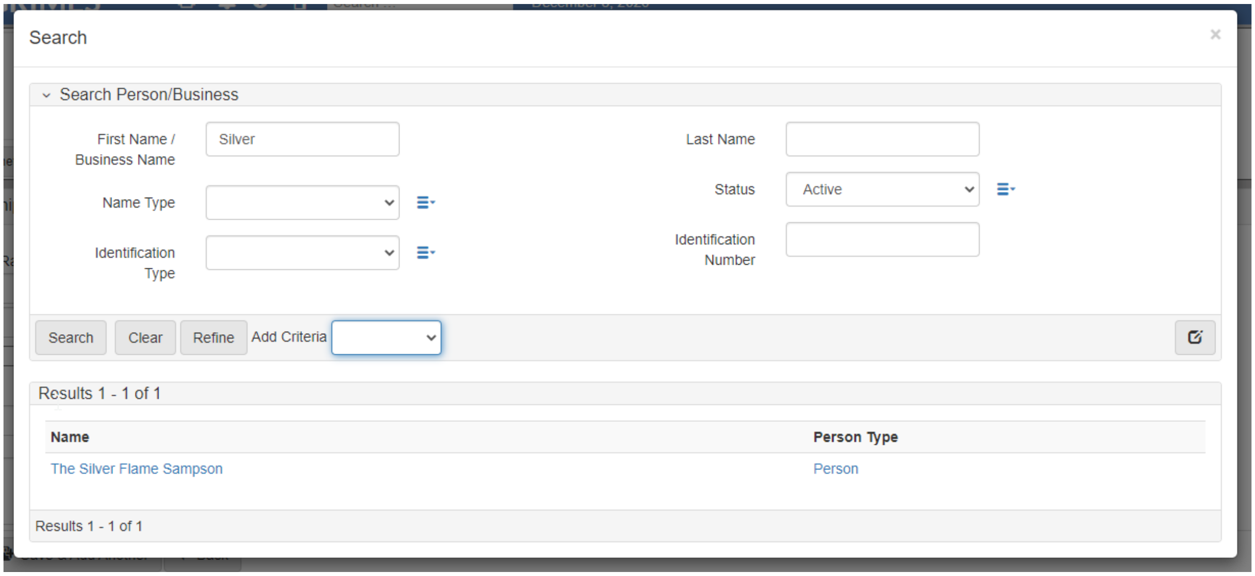
Involvement Type	Case Type	Case Name	Case Number	Case Status	Case Status Date	Static Text
Victim/Witness Coordinator	Misdemeanor Class B	- The Silver Flame Sampson ~ POSSESSION OF SUBSTANCE IN PENALTY GROUP PG 2-A <2OZ2000004958	20-495	Intake	06/04/2006	
Victim/Witness Coordinator	State Jail Felony	- The Silver Flame Sampson ~ POSSESSION OF SUBSTANCE IN PENALTY GROUP 2. <1G2000004958	20-496	Pending Grand Jury	08/13/2014	
Victim/Witness Coordinator	Felony Third Degree	- Kord Gertrude ~ UNAUTHORIZED USE OF A VEHICLE20-00412	20-497	Pending Grand Jury	09/30/2011	
Victim/Witness Coordinator	State Jail Felony	- Chislev Malcolm ~ FORGERY. 2000003030	20-498	Pending Grand Jury	05/04/2018	
Victim/Witness Coordinator	State Jail Felony	- Chislev Malcolm ~ FORGERY. 2000003030	20-499	Pending Grand Jury	09/12/2013	

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.



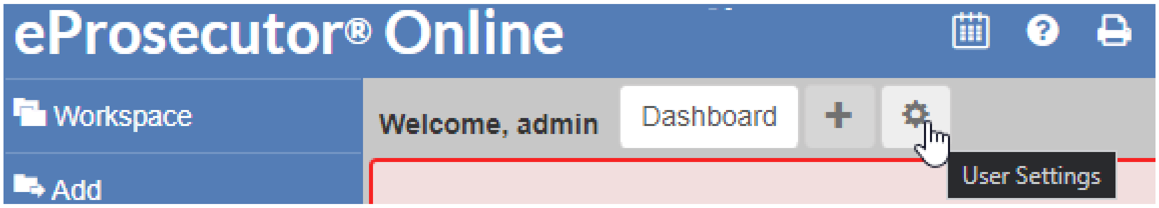
Dashboard

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 in the **Dashboard**. After configuring the **Dashboard**, you can access it by clicking the eProsecutor Online logo at 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**.
2. Once configured, to access the **Dashboard Settings**:
    1. Click the eProsecutor Online logo at the top left.
    2. At the top of the **Dashboard**, find the **[Dashboard]** button, and click the gear icon beside it to show **User Settings**:



On the **User Settings** screen for the **Dashboard**, a user can add or remove gadgets from their dashboard:

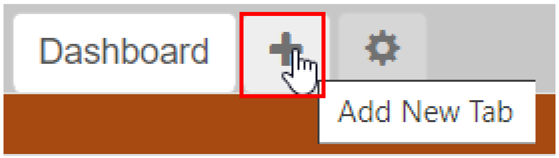
Gadget	Description
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/archived_search.html	Show the latest archived searches
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/assignments.html	Show your current action items/assignments.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/calendar.html	Show calendar for five weeks for given location.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/cases.html	Show recent, assigned, upcoming events, recent activity, or open tasks on cases that you are working with or are assigned to you.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/date_calculator.html	Calculate a date *N* days out avoiding holidays or dark times.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/directory_search.html	Search the directory.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/news.html	Show court news.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/notepad.html	Notepad for personal reminders and post-its.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/saved_search_results.html	Show the latest results from a saved search.
https://documentation.journaltech.com/eProsecutorOnline/user/dashboard/saved_searches.html	Show your saved searches.

Multiple tabs

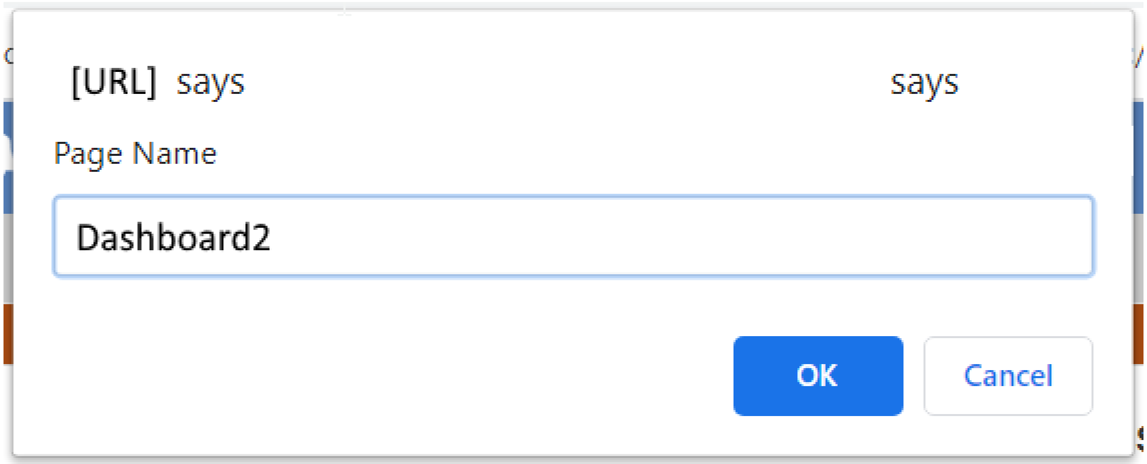
An **Dashboard** may be configured to use an arbitrary number of gadgets, including multiple copies of the same gadget with different configurations. Despite this, users may find it more convenient to add more tabs to the **Dashboard**, creating different screens for different types of information or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

To add more tabs:

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



3. After clicking the **Add New Tab** icon, a popup prompts you for the new **Page Name**:



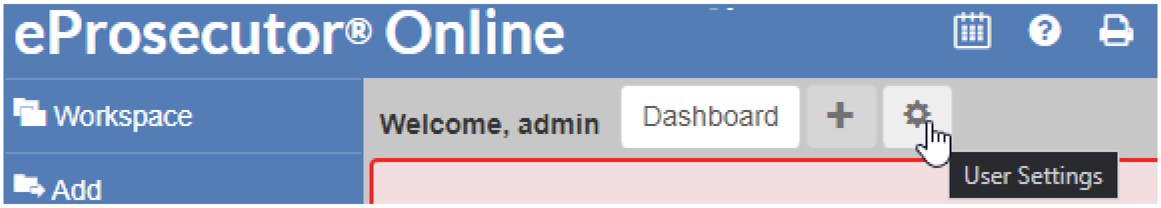
4. Fill in the prompt with the name of the new **Dashboard**, then click **[OK]**.
5. The new tab behaves exactly like the first **Dashboard**, but they can have separately configured gadgets.

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

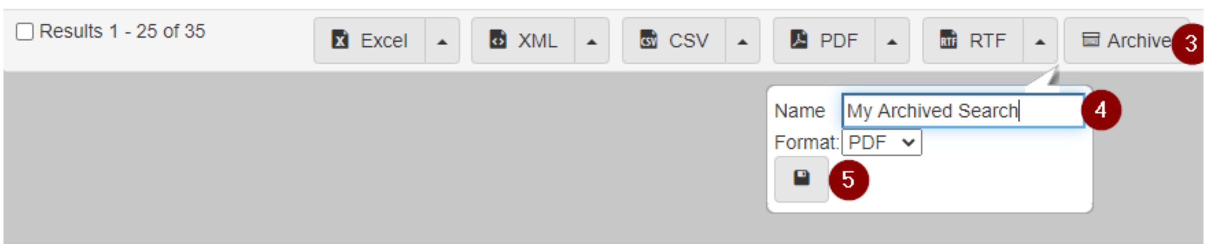
1. Open the **Dashboard**.
2. At the top of the **Dashboard**, find the **Dashboard** tab, then click the gear icon. The **User Settings** screen shows:



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

Create an archived search

1. Browse to a search in the system.
2. Fill out the parameters as needed, then click **[Search]**.
3. Scroll 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:

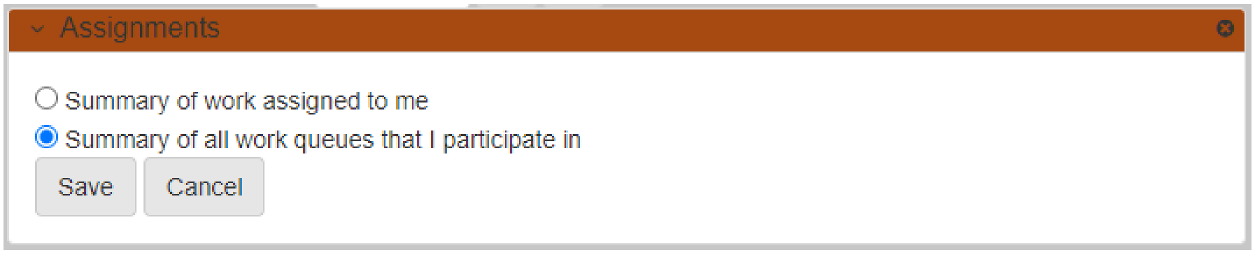
1. Each **Archived Search** is listed by date.
2. Click the name of the **Archived Search** to download the associated file.

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 **[+]** next to the **Assignments** gadget. After clicking **[Close Settings]**, 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:

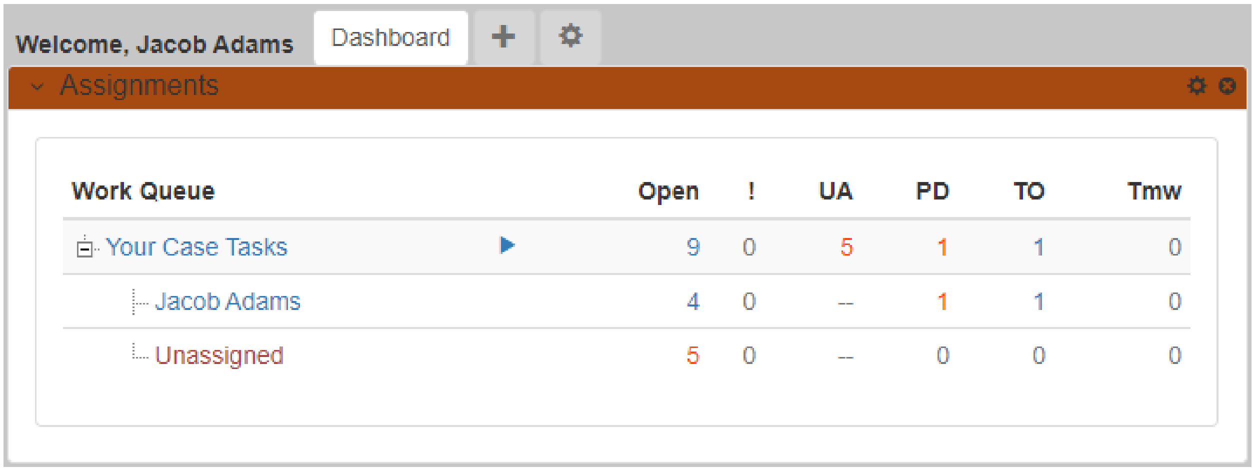


There are two options to choose from when configuring the gadget:

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**: show all work queues and assignments that you are responsible for. If you are a manager, the gadget shows you 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 show more information.



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

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

Clicking the arrow that looks like a "play" button allows you to quickly claim the next unassigned task.

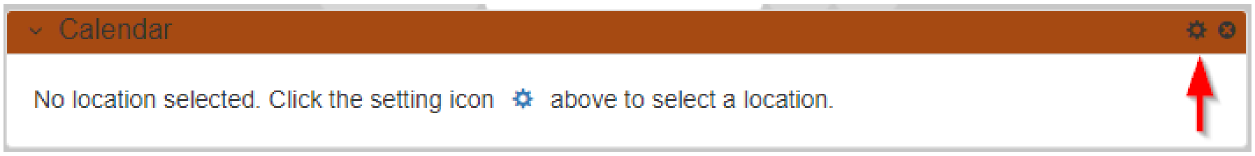
Click an assignment to show more details or to navigate to the associated case.

Calendar gadget

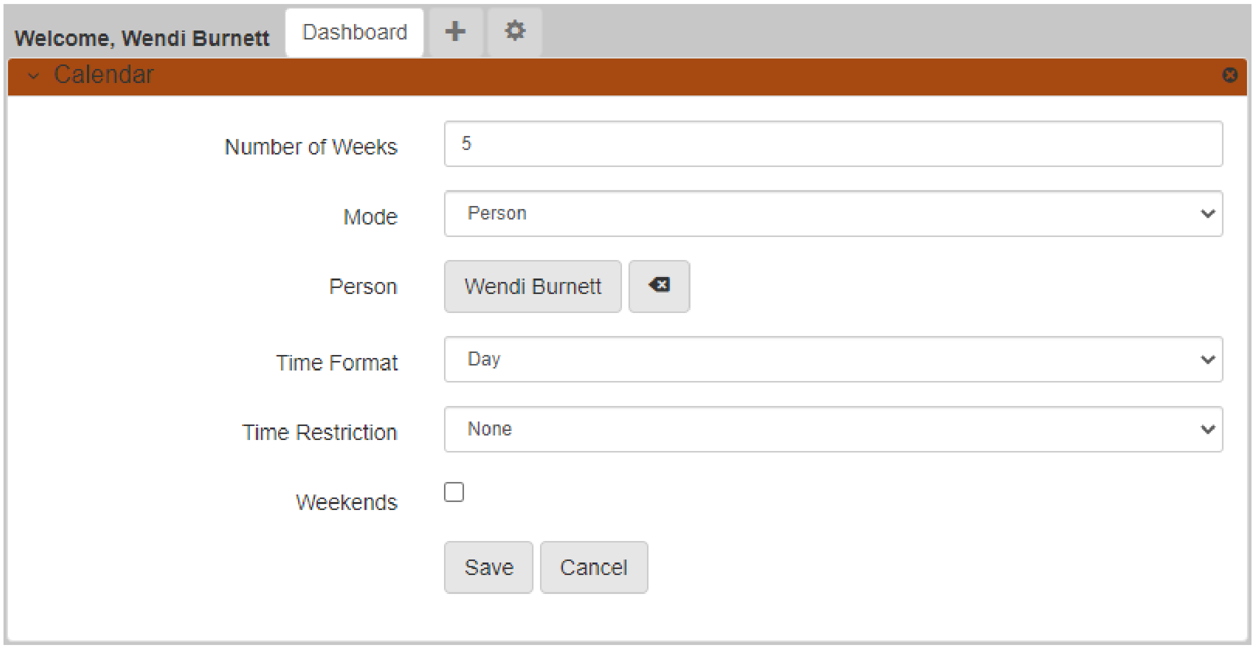
The **Calendar** gadget can be used to show events, holidays, and time off for persons or locations. It can be added by clicking the gear icon at the top of your **Dashboard**, then clicking the **[+]** button next to the **Calendar** gadget. After clicking the **[Close Settings]** button, the **Calendar**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

Configure the calendar

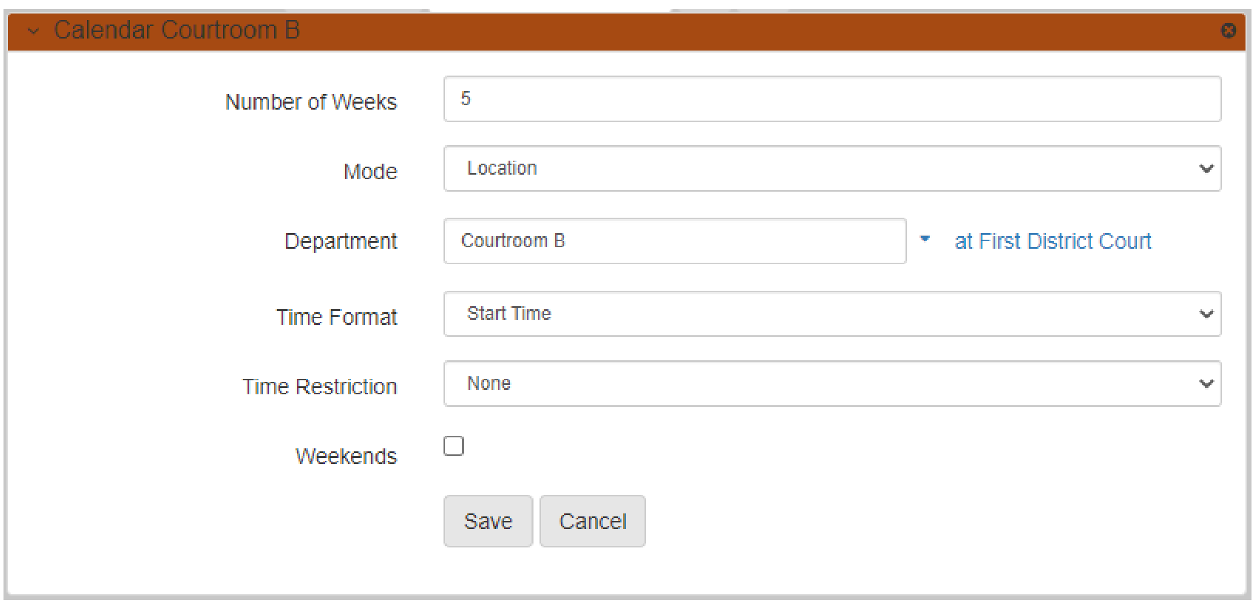
To configure the **Calendar** gadget, click the gear icon in the top right corner of the gadget.



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



In addition to a person, you can configure the **Calendar** gadget to show information for location:



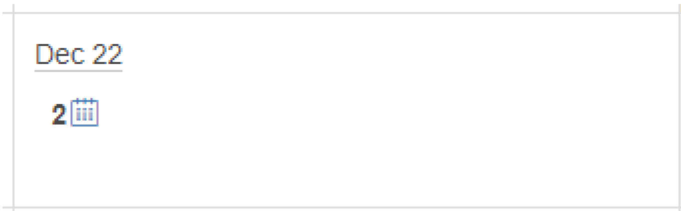
Calendar fields

- **Number of Weeks**: The 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 **FIXME**Mode, then you can select the department. Select the **Courthouse** first, then select the **Department** in the selected

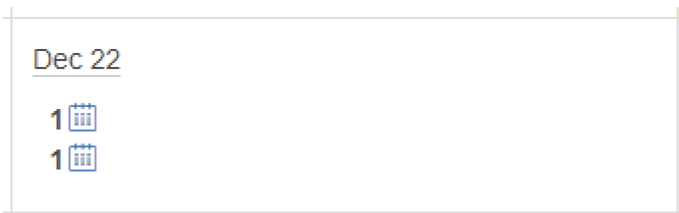
courthouse. Courthouses and departments (**Directory Organizations**) are configured by an administrator.

- **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 show your calendar events, but if you are a supervisor, you may want to show the calendars of your employees.
- **Time Format**: There are 3 formats to choose from:

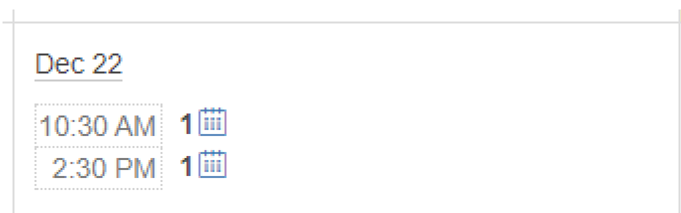
1. **Day**:



2. **AM PM**:



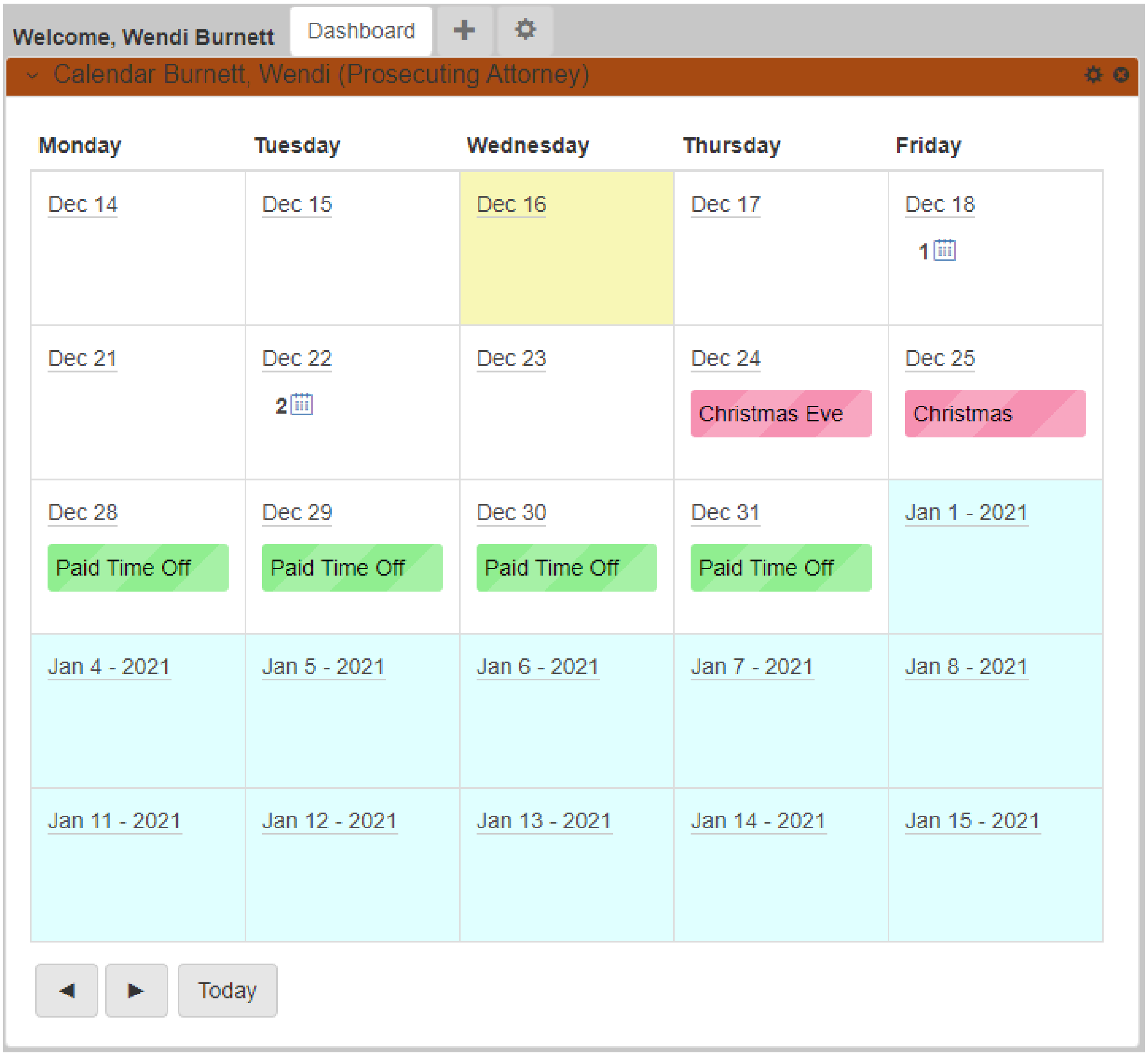
3. **Start Time**:



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

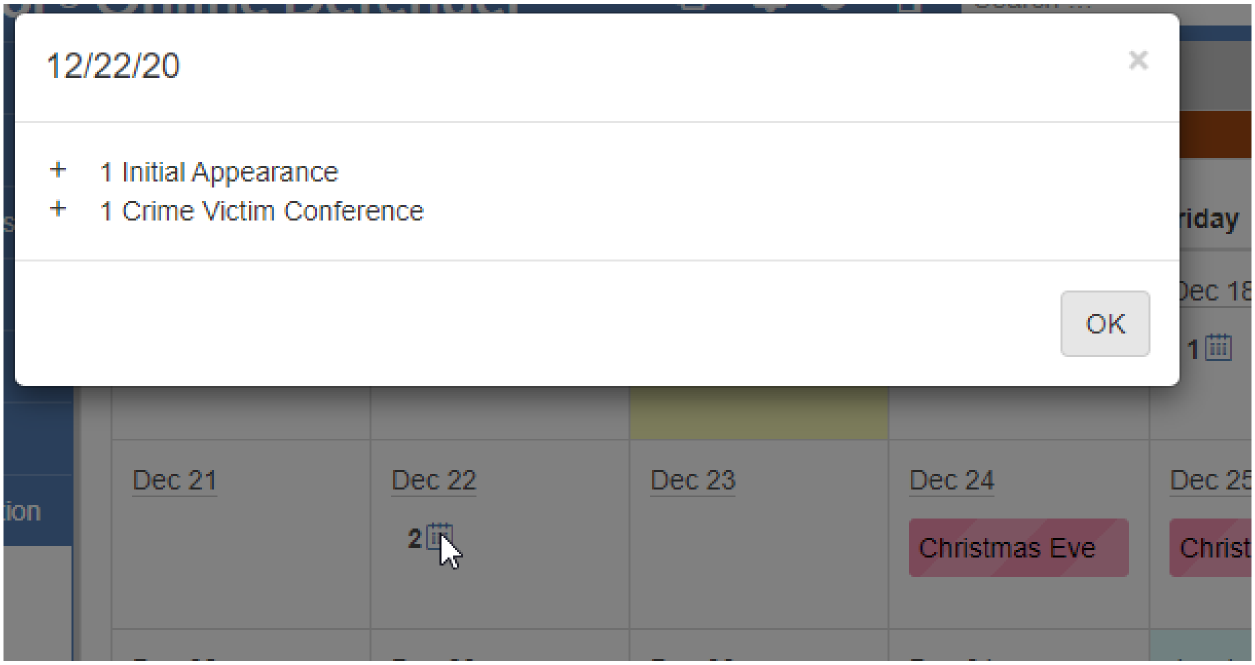
View the calendar

After configuring the calendar, it shows on your **Dashboard**.



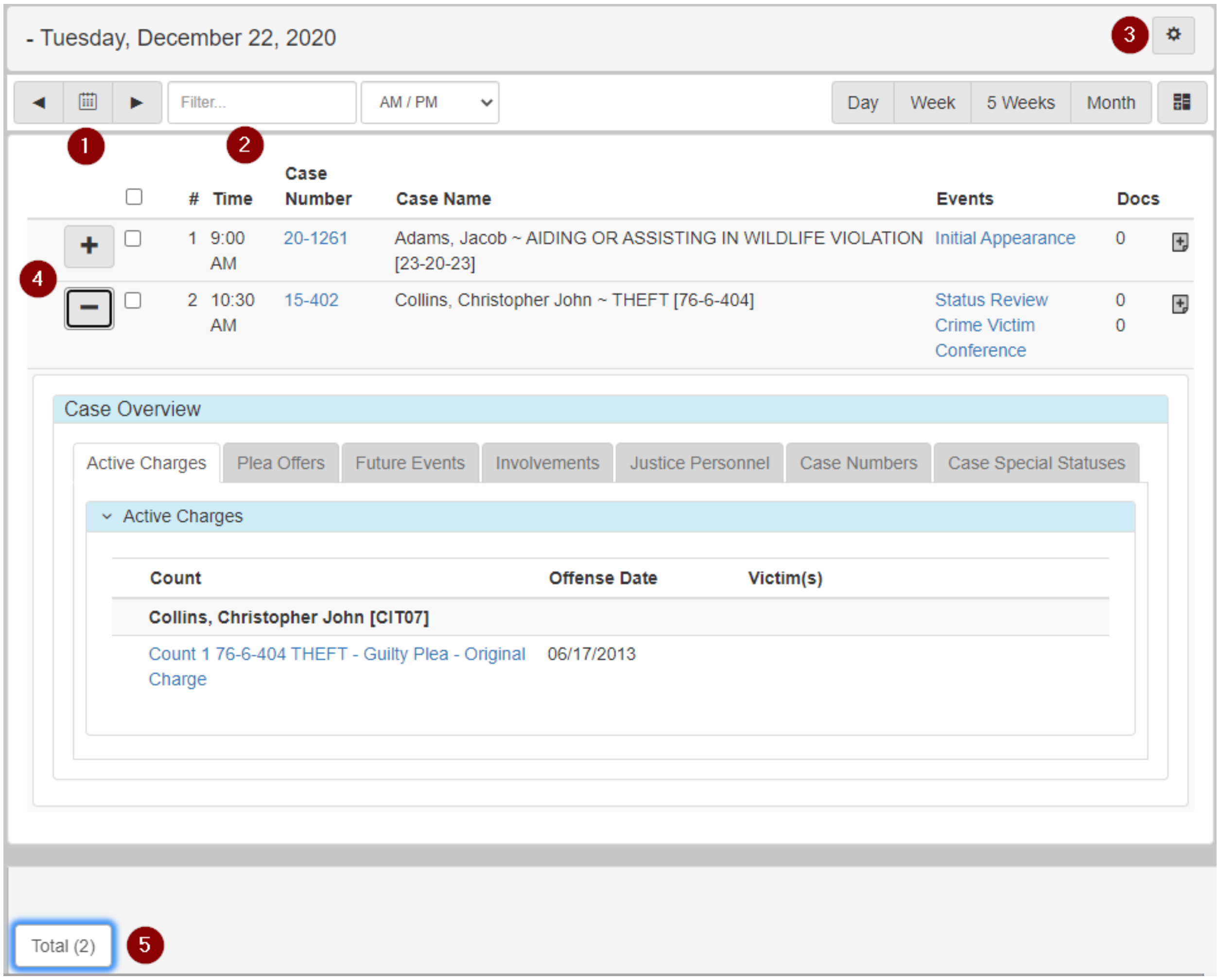
As shown, the calendar shows events, holidays, and off time for the selected person. An administrator configures holidays and off time.

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:

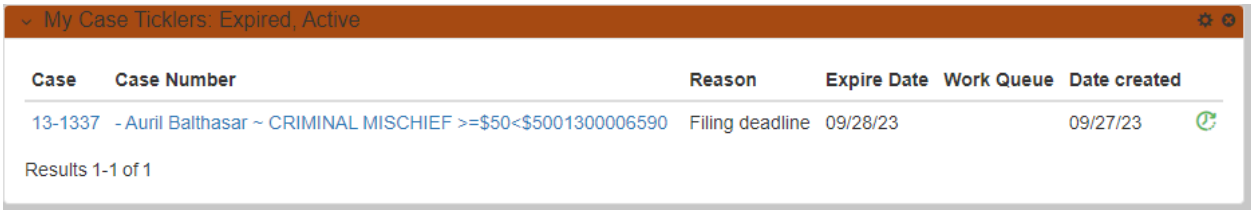


Here are some of the features of the Calendar Day Details view:

1. Change which day you are showing by using the arrow keys or the calendar icon in the top left corner.
2. Filter the events shown by typing in the filter box.
3. Change which calendar you are viewing by clicking the gear icon in the top right.
4. Show 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 **[Total]** at the bottom to clear the filter and view all cases/events again.

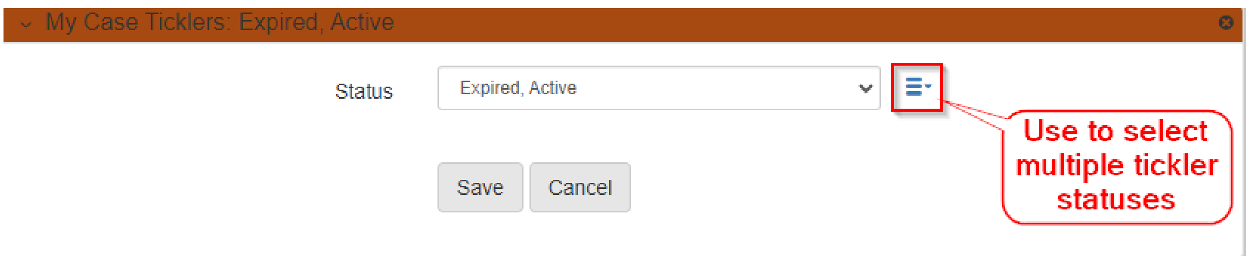
Case ticklers gadget

The **Case Ticklers** gadget shows your active, expired, dismissed, or deleted case ticklers. It provides access to the tickler associated case, reason, expiration date, and date created. It can be added by clicking the gear icon at the top of your **Dashboard**, then clicking **[+]** next to the **Case Ticklers** gadget. After clicking **[Close Settings]**, the **Case Ticklers** gadget shows on your **Dashboard**.



Configuration

By default, the **Case Ticklers** gadget shows all active and expired user ticklers. To adjust this behavior, click the gear icon in the top right corner of the gadget on the **Dashboard**. The following screen shows:



Use the dropdown to select a single status or use the multiselect dropdown on the right to select a custom set of statuses.

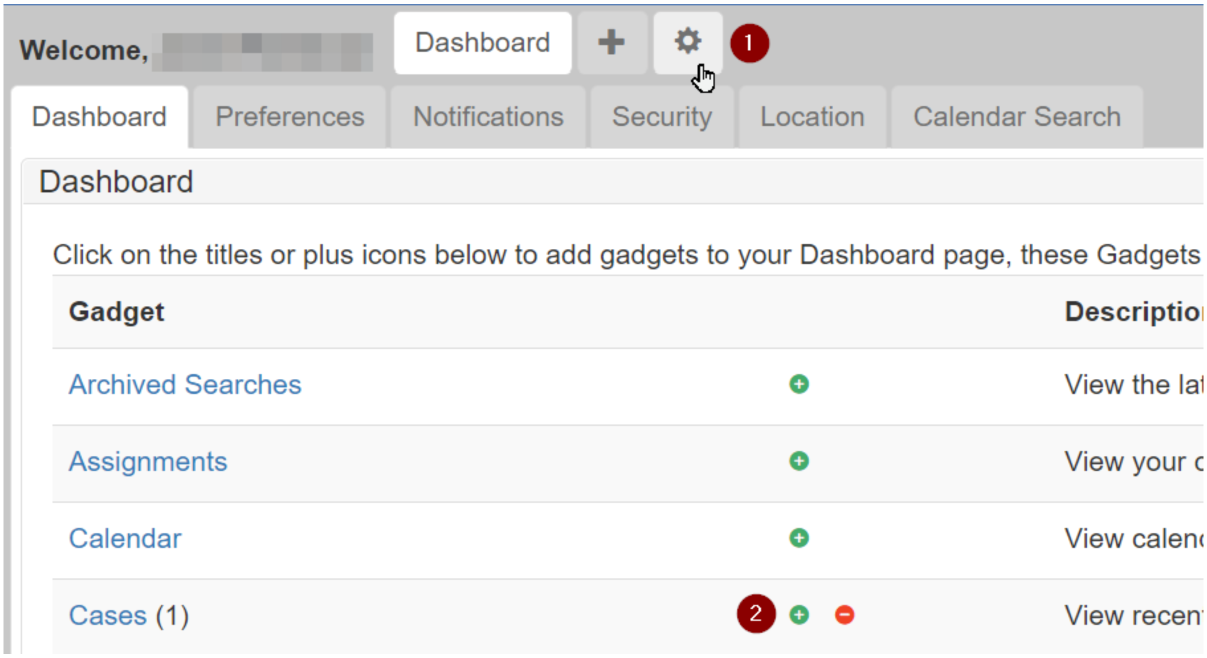
Cases gadget

The **Cases** gadget shows 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** gadget shows some information about your recent cases.

Add the cases gadget

To add the **Cases** gadget to your **Dashboard**, make sure you have the **Dashboard** tab selected, if you have multiple tabs available.

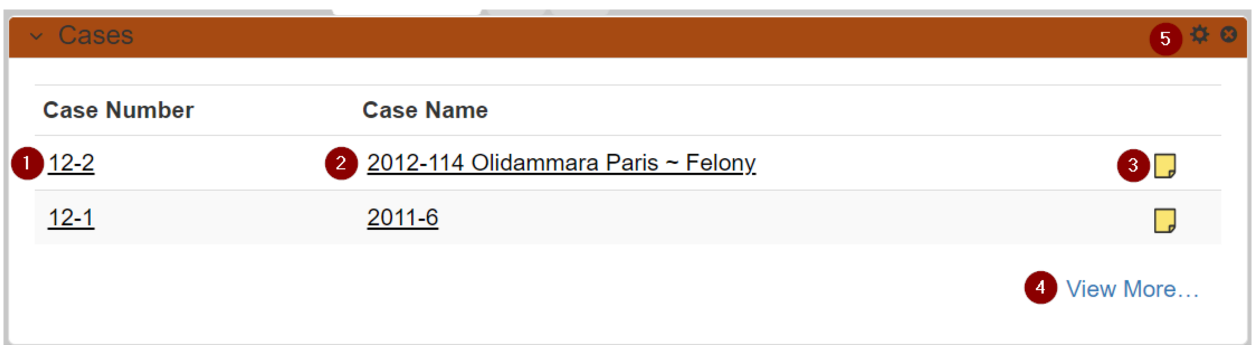
1. Click the gear icon at the top of the **Dashboard**.
2. Click the green + icon to add cases to your **Dashboard**.



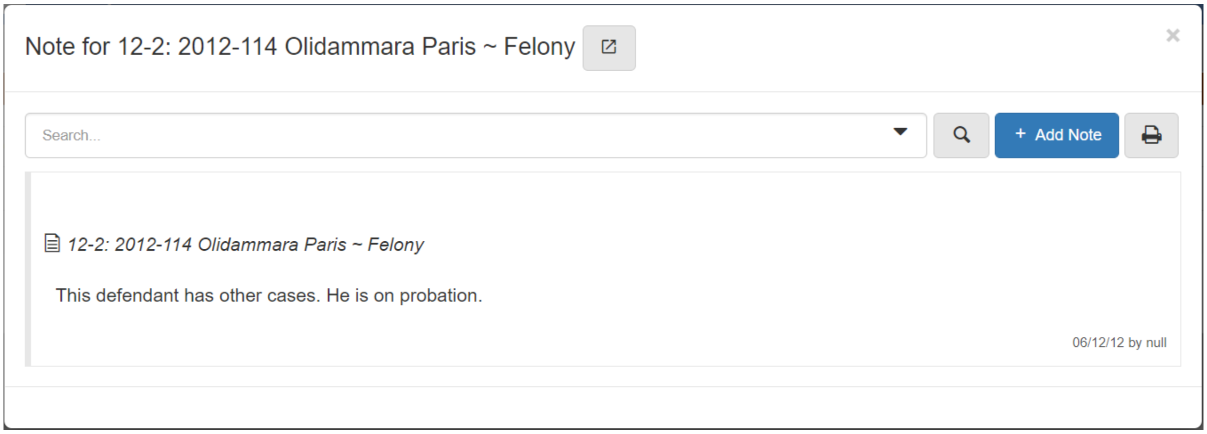
The **Cases** gadget should now be at the bottom of the **Settings** screen. Click **[Close Settings]** to exit.

Use the cases gadget

The **Cases** gadget must first be added to the **Dashboard**. Once added, recent cases are shown in a default view. Review the available actions for the **Cases**:



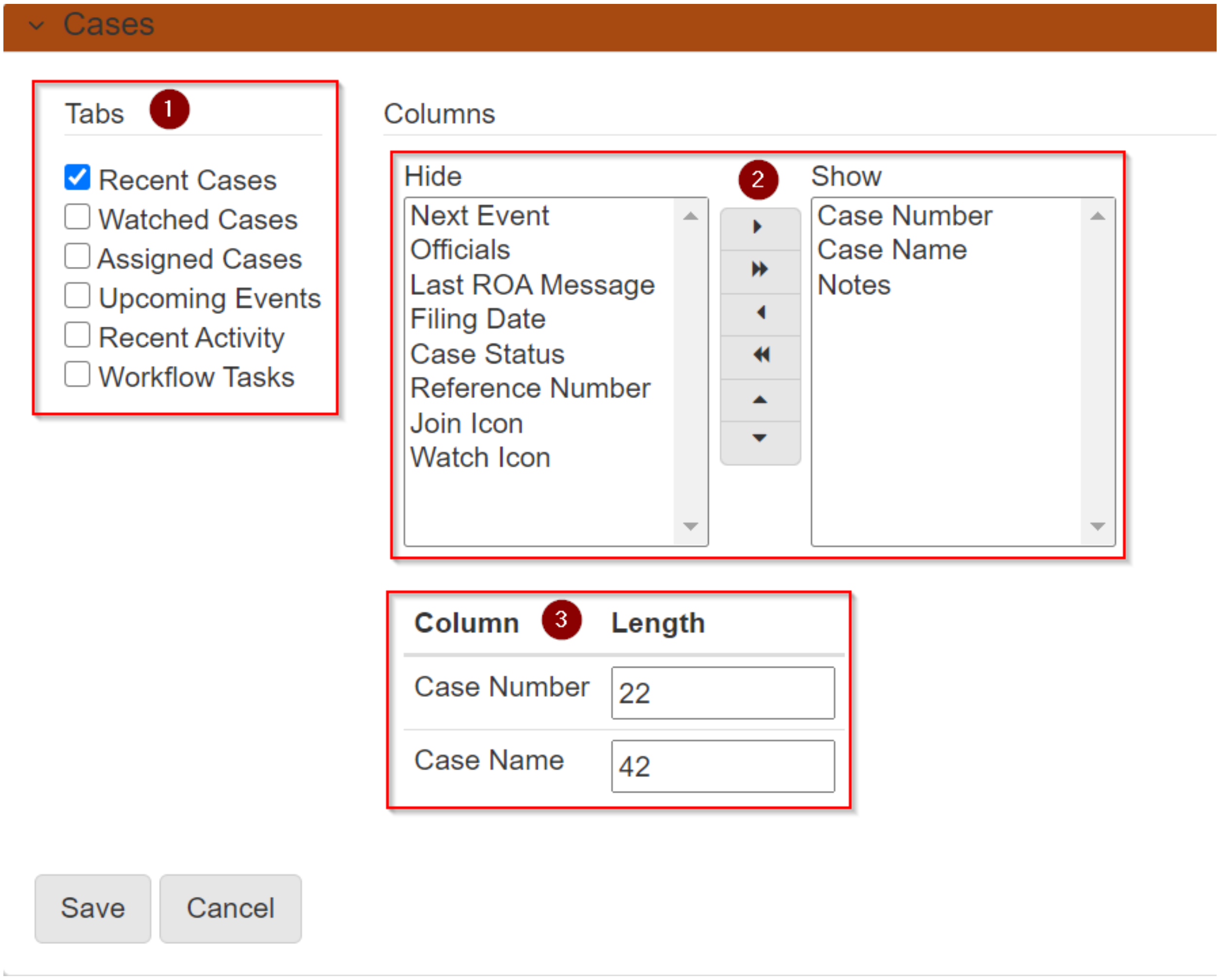
1. Click a case Id in the **Case Number** column to navigate to the recent case.
2. Click a case title to navigate to the recent case.
3. Click the "paper" icon to open the **Case Notes** in a dialog.
4. Click the **View More...** to show the **My Recent Cases** screen. It looks similar to the gadget.



5. Click the gear icon to open the gadget configuration.

Configure the cases gadget

The **Cases** gadget can 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.

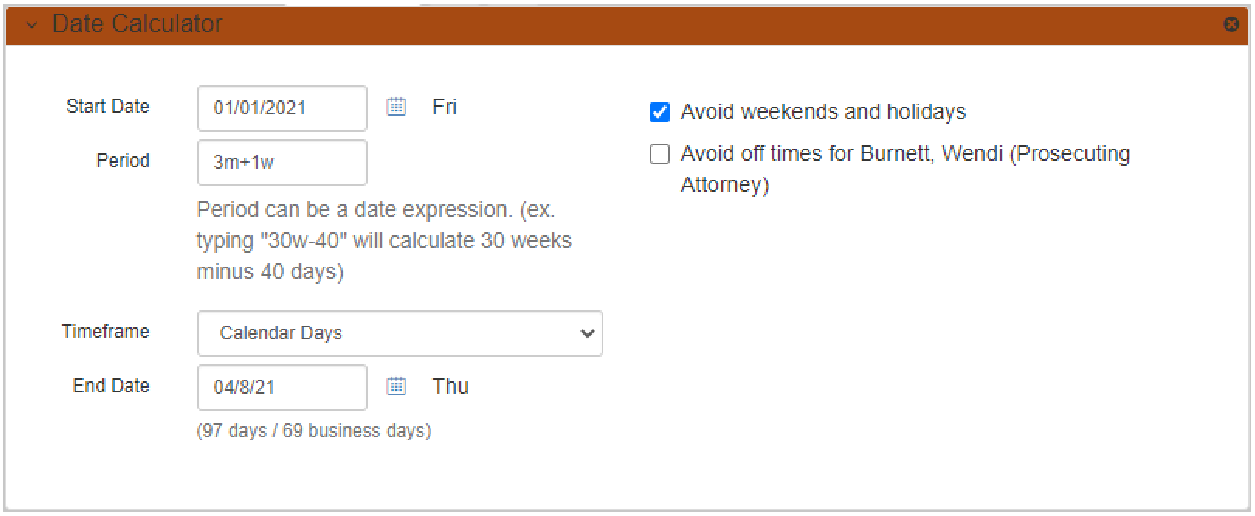


1. Select which tabs you want shown in the gadget. The options are **Recent Cases**, **Watched Cases**, **Assigned Cases**, **Upcoming Events**, **Recent Activity**, and **Workflow Tasks**. Each selected item adds a new tab to the gadget.
2. Select the columns you would like to show in the table.
3. Set the character length to show in the **Case Number** and **Case Name** columns.

Click **[Save]** to store the configuration.

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.



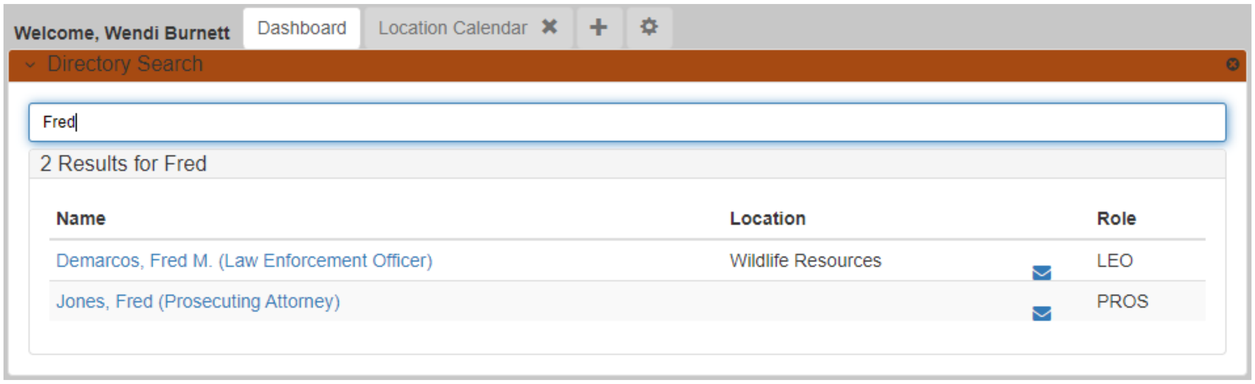
Field descriptions

- **Start Date**: The date to use as the start of your calculation.
- **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. Example: a **Period** of `5y+3m+1w-1d` would calculate the date that is 5 years, 3 months, 1 week, minus one day after the date selected in the **Start Date** field.
- **Timeframe**: the unit of time to use for the **Period**. The options are: **Business Days**, **Calendar Days**, **Months**, **Weeks**, **Years**. Example: to calculate 15 business days from now, you would enter `15` as the **Period** and **Business Days** in the **Timeframe**.

- **End Date**: This is the date 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**: If this is selected and the end date would have fallen on a weekend or holiday, the end date is the next available work day. Holidays are set by your administrator.
- **Avoid off times for <User Name>**: If this is selected and the end date would have fallen on a day that you have scheduled off, the end date is the next available day after the scheduled time off. 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 **[+]** next to the **Directory Search** gadget. After clicking **[Close Settings]**, the **Directory Search** gadget shows on your **Dashboard**.



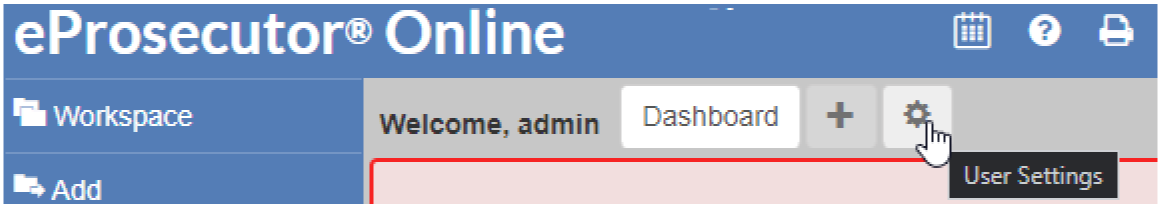
After performing a search, you can click the mail icon to email individuals returned from the search.

News gadget

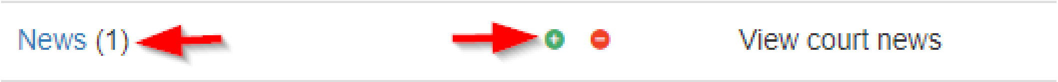
The **News** gadget shows a message from administrators.

Add the gadget

1. Open the **Dashboard** by clicking the eProsecutor Online logo at the top-left of the screen.
2. At the top of the **Dashboard**, find the **Dashboard** tab, then click the gear icon to show the **User Settings** screen:

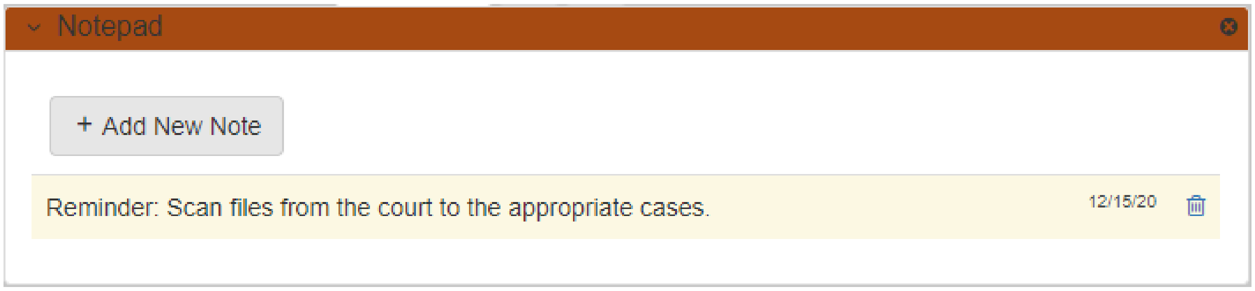


3. Click **[+]** next to the **News** gadget item:

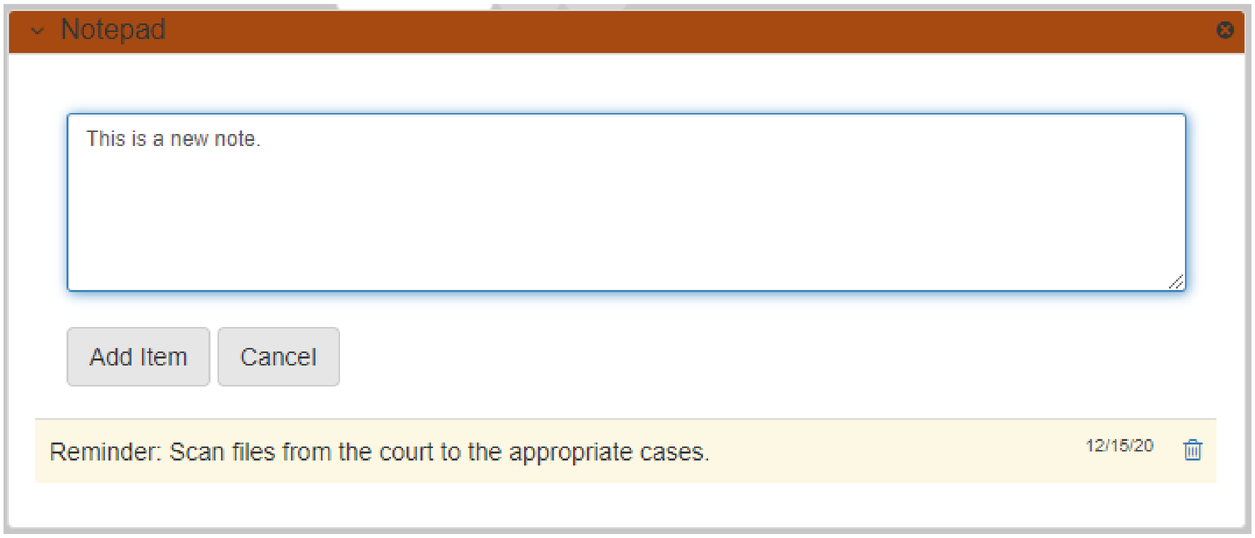


Notepad gadget

The **Notepad** gadget can be added to a **Dashboard** and allows you to record free-form text notes. It can be added by clicking the gear icon at the top of your **Dashboard**, then clicking **[+]** next to the **Notepad** gadget. After clicking **Close Settings** icon, the **Notepad** gadget shows on your **Dashboard**.



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



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

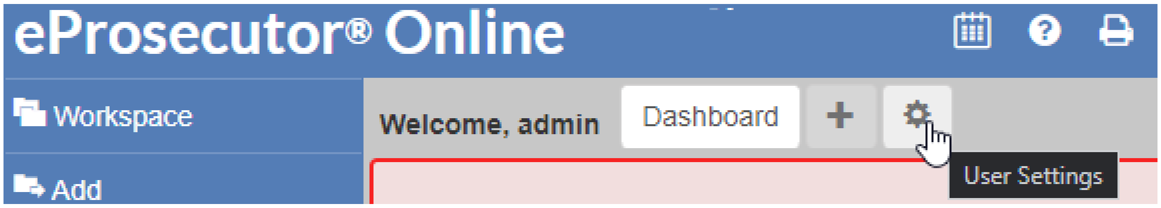
To edit a note, click the text of the note, make your edits, then click **[Update]**.

Saved search results gadget

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

Add the gadget

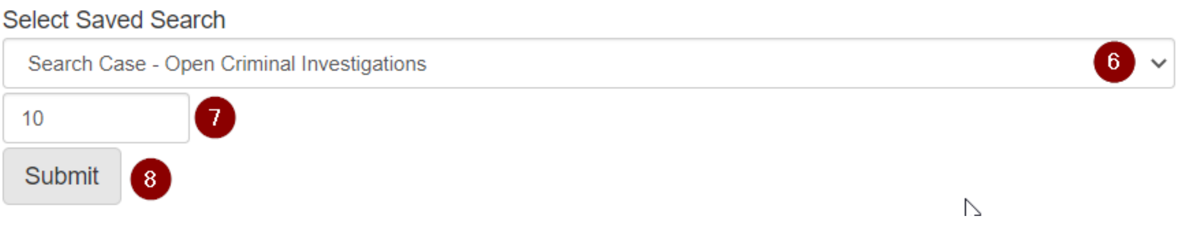
1. Open the **Dashboard** by clicking the eProsecutor Online logo at the top left.
2. At the top of the **Dashboard**, find the **Dashboard** button, and click the gear icon to show the **User Settings**:



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

4. Click **[Close Settings]**, following the list of available gadgets.
5. Find the **Saved Search Results** gadget, then click the gear icon to show the gadget settings:

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



Use the saved search results gadget

The **Saved Search Results** gadget must first be added to the **Dashboard** and configured. Once added, saved search results show on your **Dashboard**. Results can be used to:

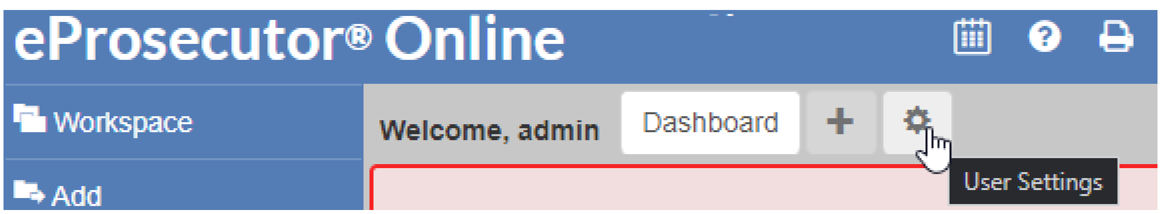
1. Quickly link to associated search results.
2. Execute actions:
    - Bulk schedule.
    - Export case events.
    - Join cases.
    - Cash receipts.

Saved search gadget

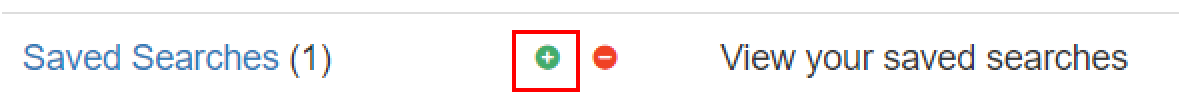
The **Saved Searches** gadget shows a list of saved searches with the option to quickly run or open them directly. The search can also be expanded to show the search parameters.

Add the gadget

1. Open the **Dashboard** by clicking the eProsecutor Online logo at the top left.
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 **Saved Searches** item:

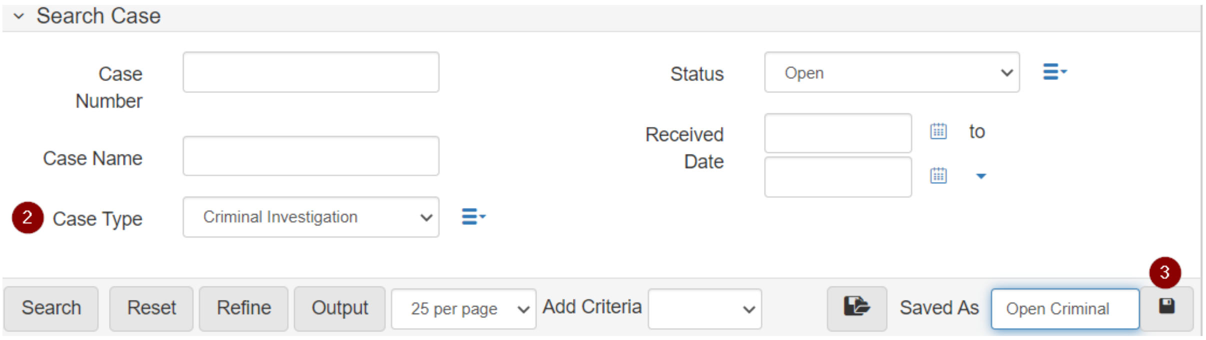


Add a saved search

1. Navigate to a search in the system.
2. Fill in the 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 finetuning 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. Click **[Run]** to open and execute the **Saved Search**.
4. Click **[Open]** to open the **Saved Search** but does not execute it.

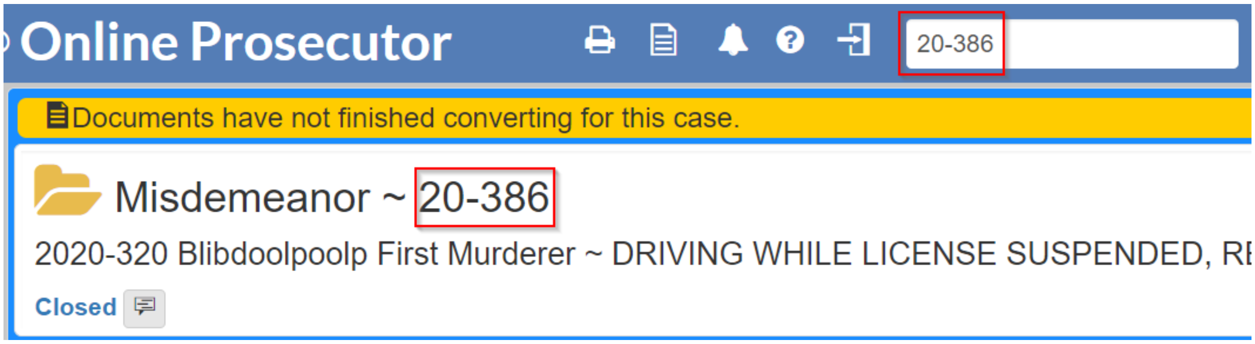
This feature is useful when your **Saved Search** includes only the common settings for the search but needs to have changes made before it is run.

Searches

Top navigation search bar

Use the **Top Navigation Search** bar to find known **Case** numbers. The bar shows the top of the all screens.

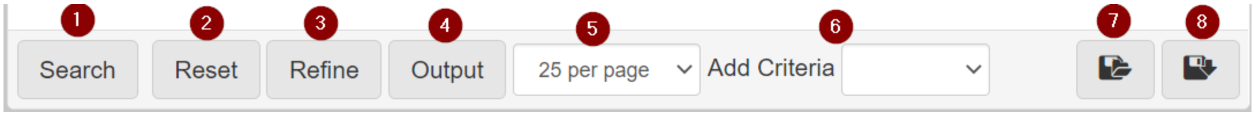
To open a known case in the **Case View**, search for the case number in the search bar.



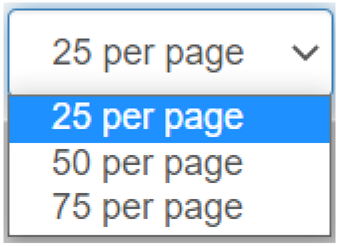
Case numbers can be found in the title of the case in the **Case Header**.

Search controls

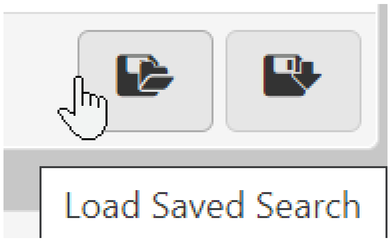
All searches listed in this section use the same set of controls:



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.

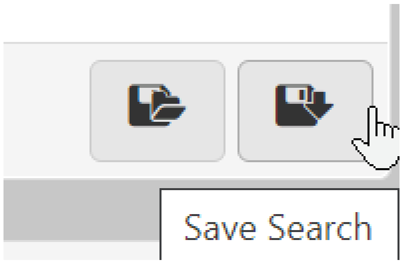


6. Select fields to configure Extra criteria that can narrow the search.
7. Click the **Disk Folder** icon to load a previously saved search.



If you have run this search before and saved the search, you can load the search to run it again.

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



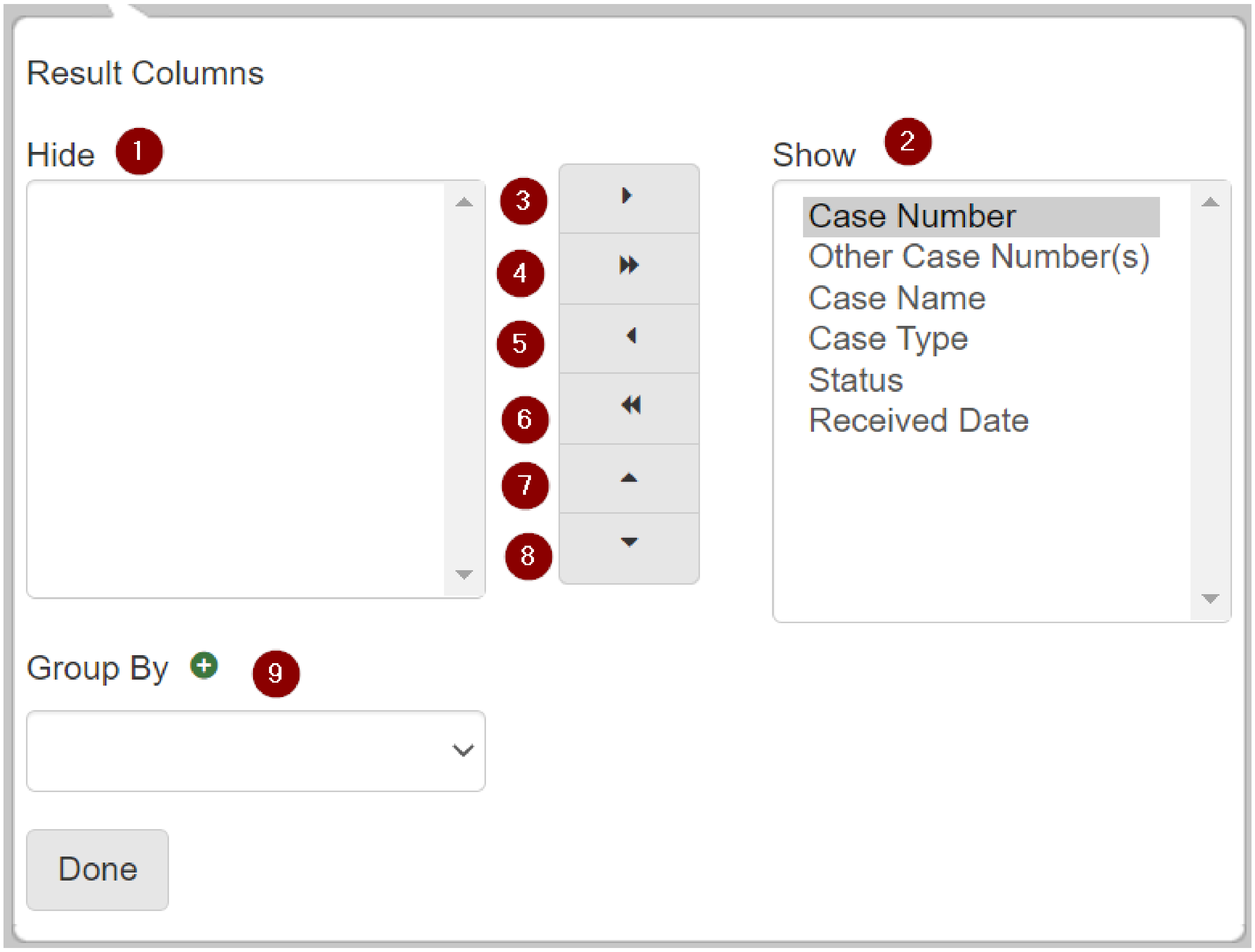
Save a search so you can run it again later with the same parameters.

Refine controls

Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/advanced_search.html for more information.

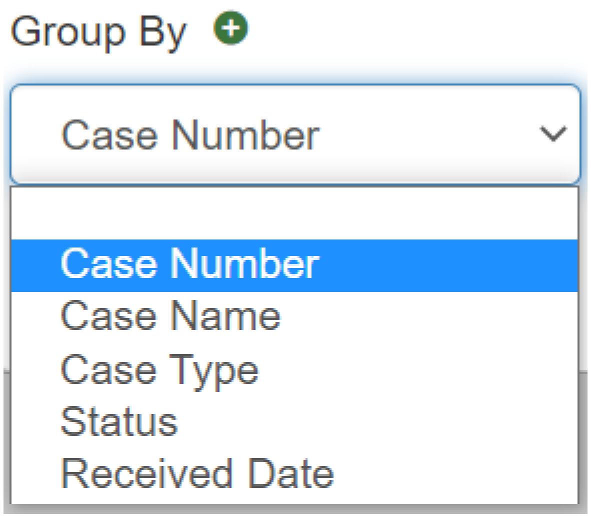
Configure search output

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



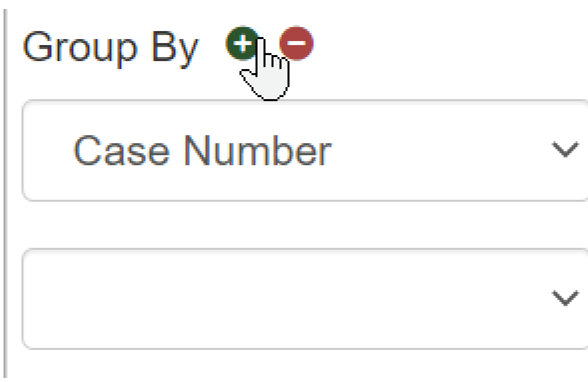
You can configure the search result output with the following:

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.



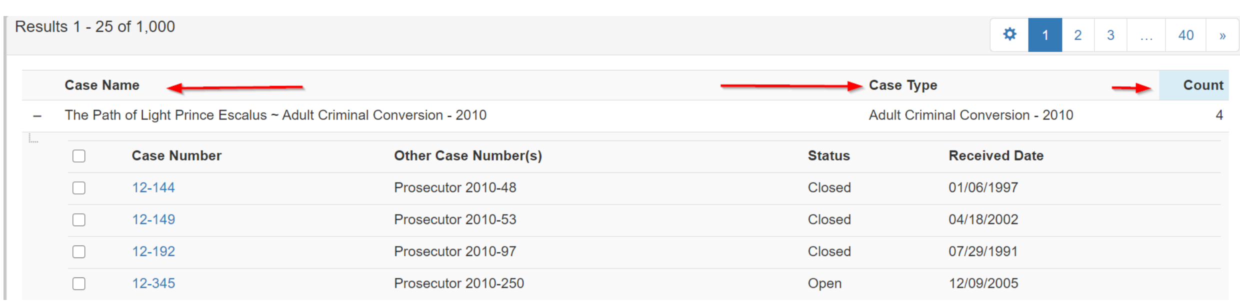
Select the desired parameter to group your results by in the dropdown.

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 - 25 of 1,000

	Case Name	Case Type	Count
–	The Path of Light Prince Escalus ~ Adult Criminal Conversion - 2010	Adult Criminal Conversion - 2010	4

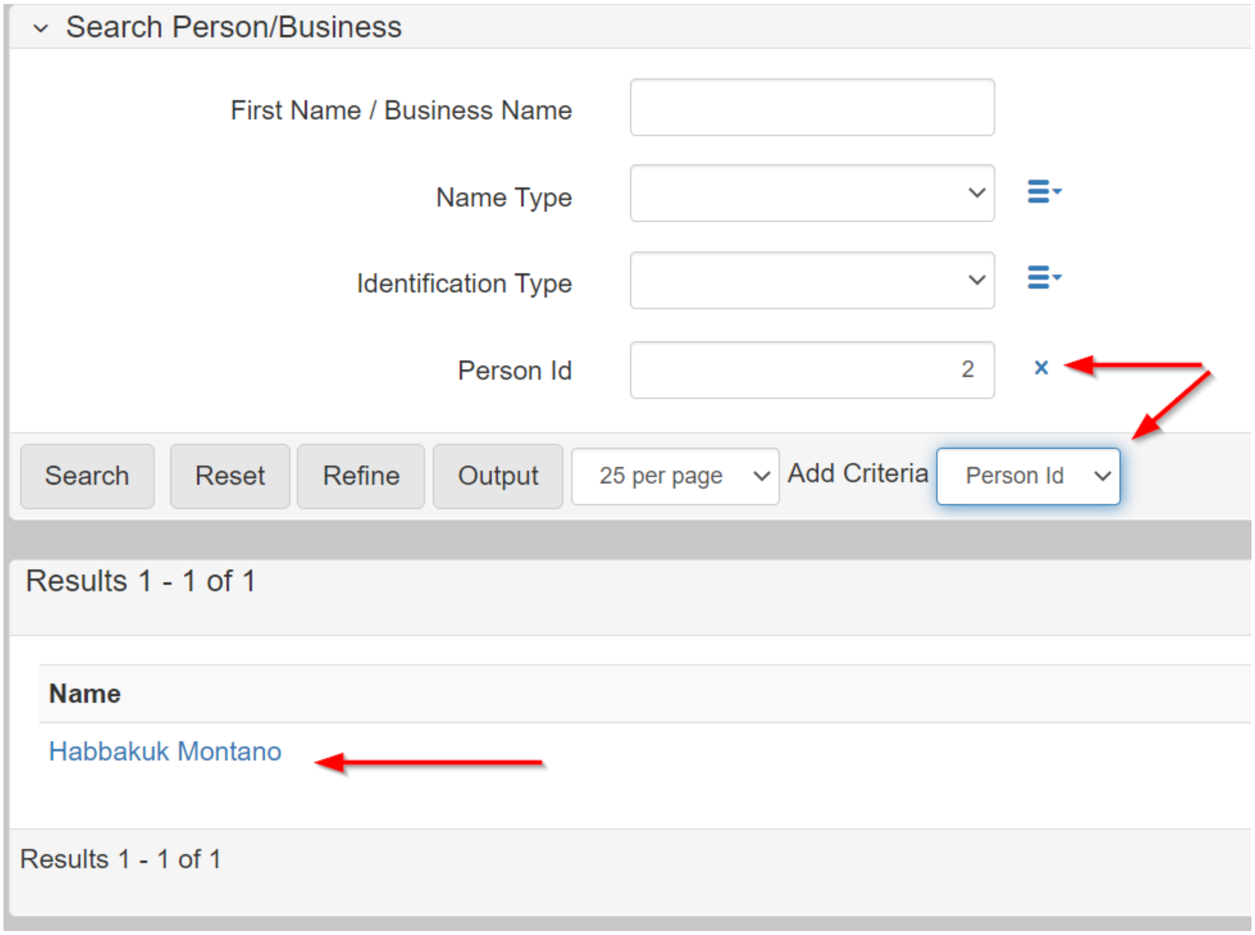
Case Number	Other Case Number(s)	Status	Received Date
12-144	Prosecutor 2010-48	Closed	01/06/1997
12-149	Prosecutor 2010-53	Closed	04/18/2002
12-192	Prosecutor 2010-97	Closed	07/29/1991
12-345	Prosecutor 2010-250	Open	12/09/2005

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.

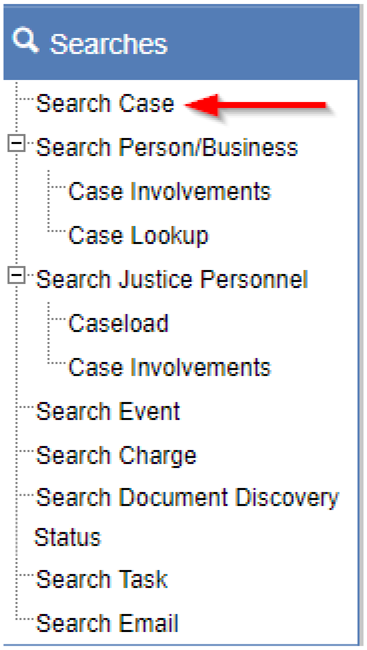
In the following example, the **Person Id** is selected in the dropdown on the **Search Person/Business** dialog. The selection add the **Person Id** field to the search form. The **Person Id** is set to 2.



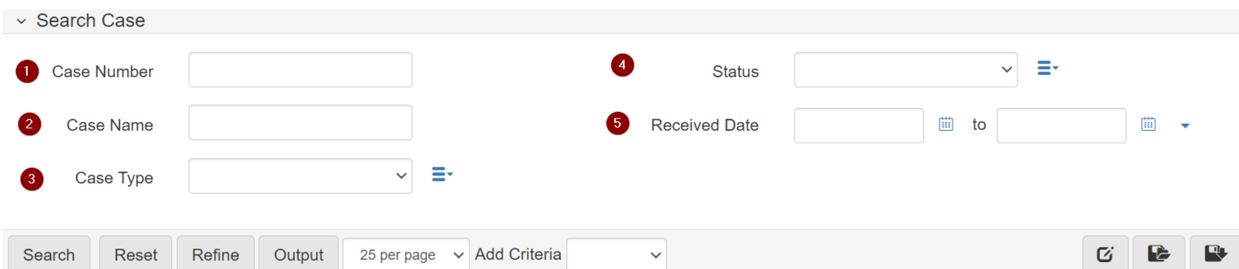
When the search executes, there is only one result because each **Person Id** is unique.

Search case

Use the **Search Case** screen to search for cases based on your search criteria. Navigate to **Left navigation** › **Searches & Reports** › **Search Case**.



Parameters



You can search for a **Case** with the following parameters:

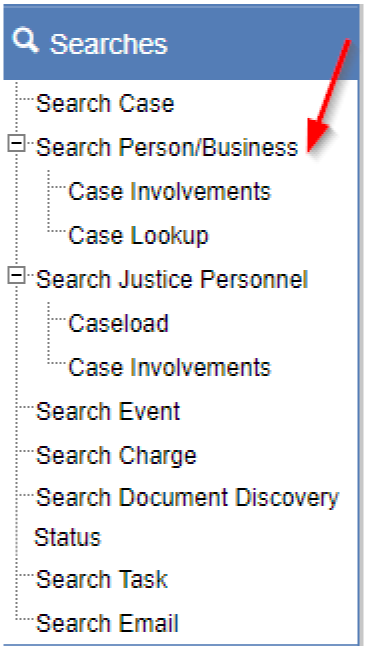
1. **Case Number**: Search cases by **Case** number.
2. **Case Name**: Search cases by name.
3. **Case Type**: Limit results to the selected **Case** types.
4. **Case Id**: Search for case records by case id. This is a special field added using Add Criteria. For more information on Criteria, refer to https://documentation.journaltech.com/eProsecutorOnline/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, refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html.

Search person/business

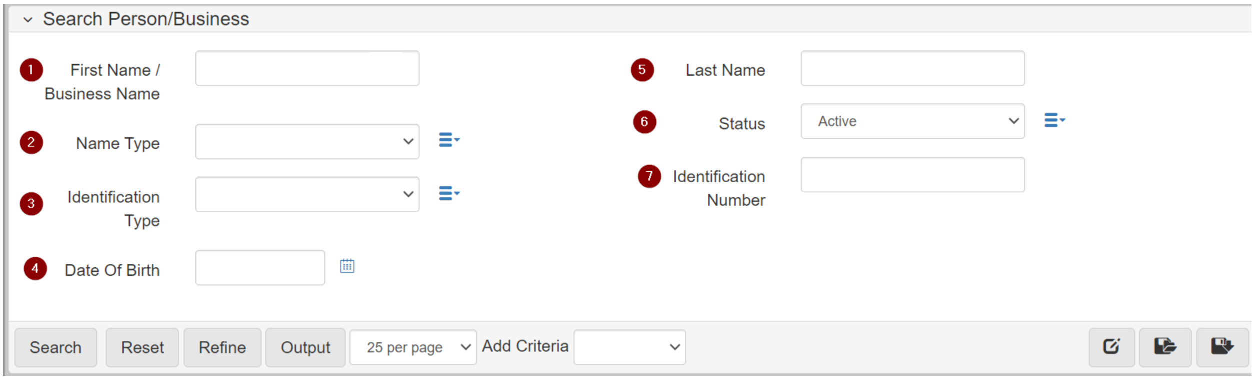
Use the **Search Person/Business** screen to search for a **Person** or business based on your search criteria.

Navigate to **Left navigation** › **Searches & Reports** › **Search Person/Business**.



Click a result to show the associated personnel record.

Parameters



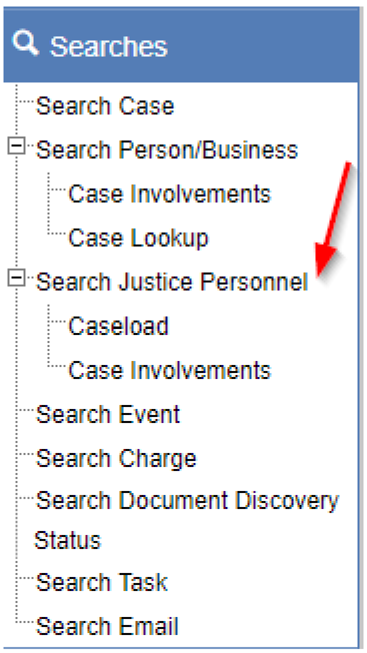
1. **First Name / Business Name**: Search for a **Person** or **Organization** by first name.
2. **Name Type**: Limit results to the selected name types.
3. **Identification Type**: Limit results to selected Identification Types.
4. **Date Of Birth**: Limit results to a birth date.

5. **Last Name**: Search for a person/business by last name.
6. **Status**: Limit results to selected statuses.
7. **Identification Number**: Search for a person/business by identification number.

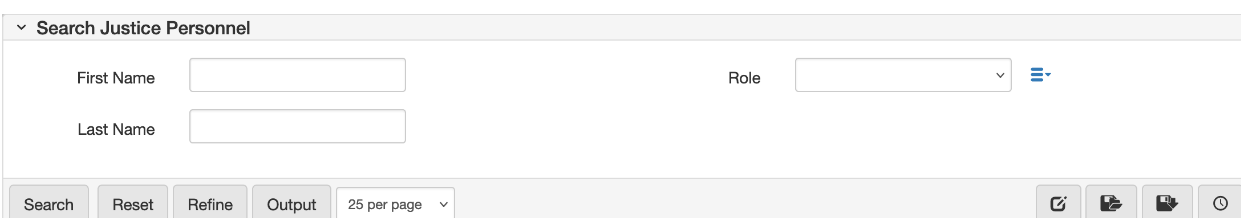
Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html for more information on refining searches.

Search justice personnel

Use the **Search Justice Personnel** screen to search for justice personnel, for example, legal staff or defense attorneys. Navigate to **Left navigation › Searches & Reports › Search Justice Personnel**, but do not select **Caseload**:



Parameters



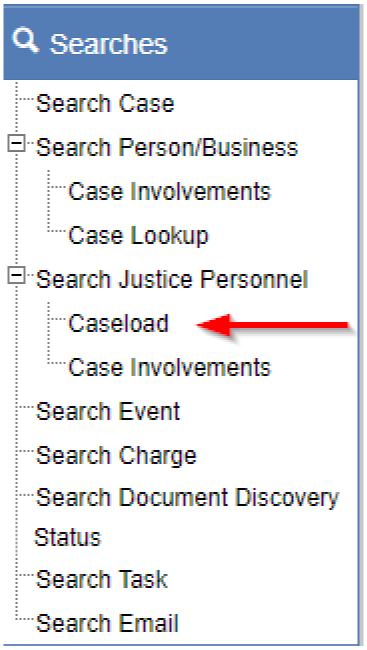
1. **Role**: Limit results to the selected role types.
2. **First Name**: Search for justice personnel by first name.
3. **Last Name**: Search for justice personnel by last name.

4. **Status**: Search for justice personnel by status (Active, Inactive, or All).

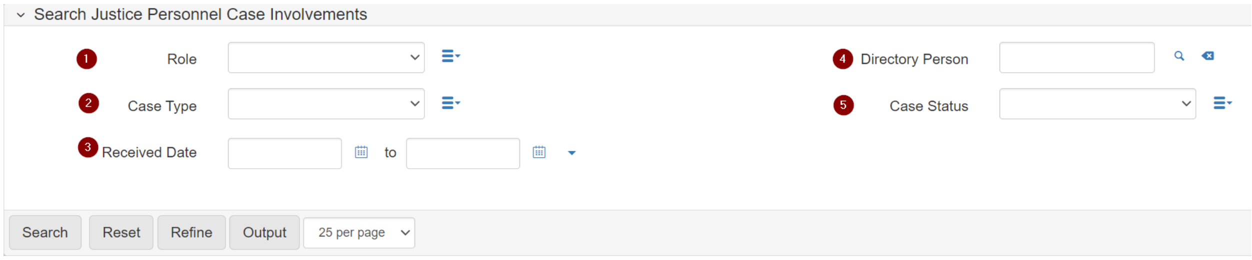
Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html for more information on refining searches.

Search justice personnel caseload

Use the **Search Justice Personnel Caseload** screen to search for justice personnel, for example, legal staff of defense attorneys, by **Case**. Navigate to **Left navigation › Searches & Reports › Search Justice Personnel › Caseload**.



Parameters



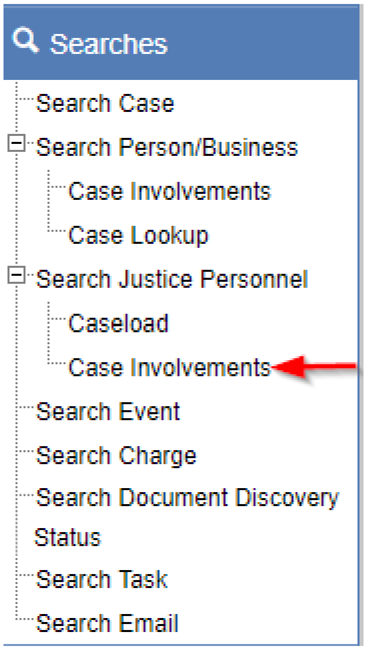
1. **Role**: Limit results to selected role types.
2. **Case Number**: Search for justice personnel cases by **Case** number.
3. **Case Type**: Limit results to selected **Case** types.
4. **Case Status**: Limit results to selected **Case** statuses.

Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html for more information on refining searches.

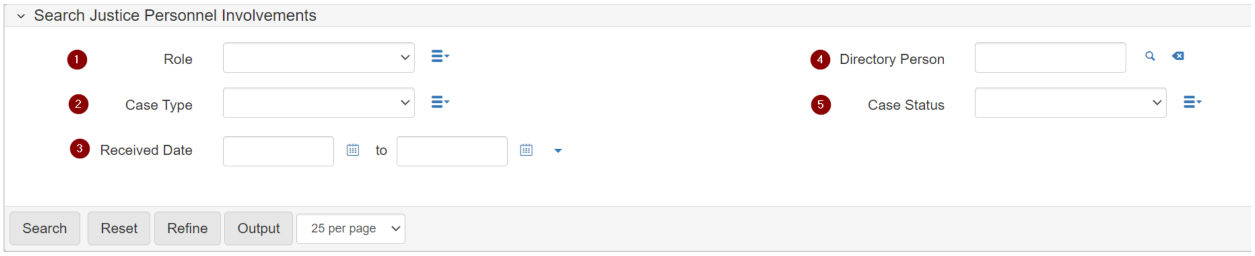
Search justice personnel case involvement

Use the **Search Justice Personnel Case Involvement** screen to search for justice personnel involvements on cases. For example, when you need to find the most recent expert witness involvement of a justice person.

To access the **Search Justice Personnel Involvements' screen, navigate to menu:Left navigation[Searches & Reports > Search Justice Personnel > Case Involvements**.



Fields



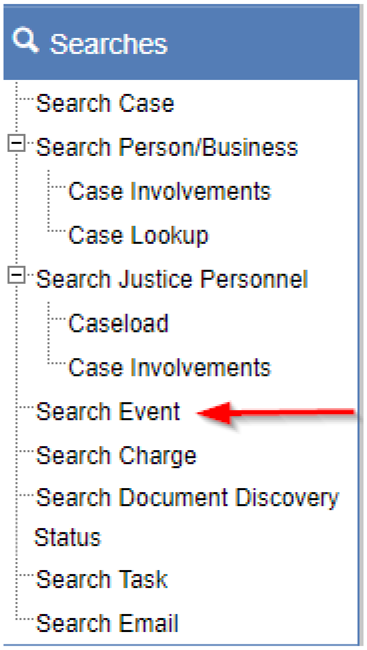
1. **Role**: Limit results to selected role types.
2. **Case Type**: Limit results to selected **Case** types.
3. **Received Date**: Limit results to cases received in a date range.
4. **Directory Person**: Limit results to selected **Directory Person**.

5. **Case Status**: Limit results to selected **Case** statuses.

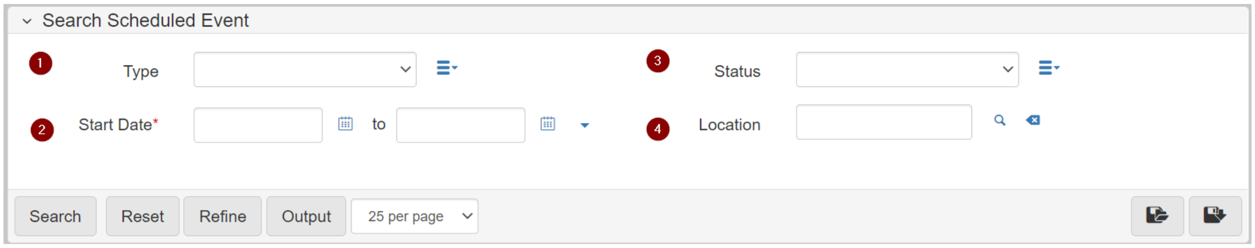
Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html for more information on refining searches.

Search event

Use the **Search Schedule Event** screen to find cases by scheduled events. Navigate to **Left navigation › Searches & Reports › Search Event**.



Parameters

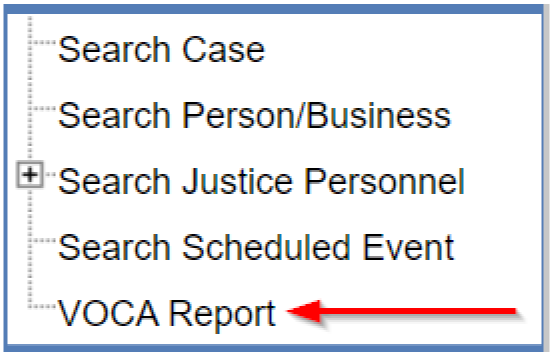


1. **Type**: Limit results to the selected event types.
2. **Start Date / To**: Limit results to events in the date range. These are required fields.
3. **Status**: Limit results to the selected statuses.
4. **Location**: Limit results to a location.

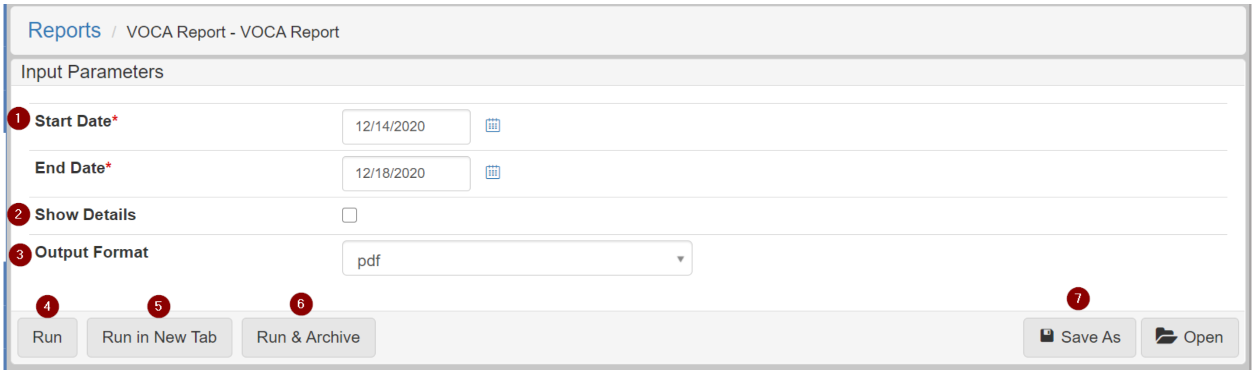
Refer to https://documentation.journaltech.com/eProsecutorOnline/user/searches/controls.html for more information on refining searches.

VOCA report

The VOCA report includes complete victim information to help with the Victims of Crime Act grant reporting. Use the **VOCA Report** screen to search for victim information to include in the report. To access the **VOCA Report** screen, navigate to **Left navigation › Searches & Reports › VOCA Report**.



Parameters



1. **Start Date**: Limit victim information to be newer than the start date.
2. **End Date**: Limit victim information to be older than the end date.
3. Select **Show Details** to generate navigation links for cases or names in the report.
4. **Output Format**: Select the desired file type for the report.
5. Click **[Run]** to generate the report and show it in the current browser tab.
6. Click **[Run in New Tab]** to generate the report and show it in a new browser tab.
7. Click **[Run & Archive]** to generate the report and archive it.
8. Click **[Save As]** to save the report to your saved reports.

Cases

Cases are the main workspace for the majority of daily tasks. 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.

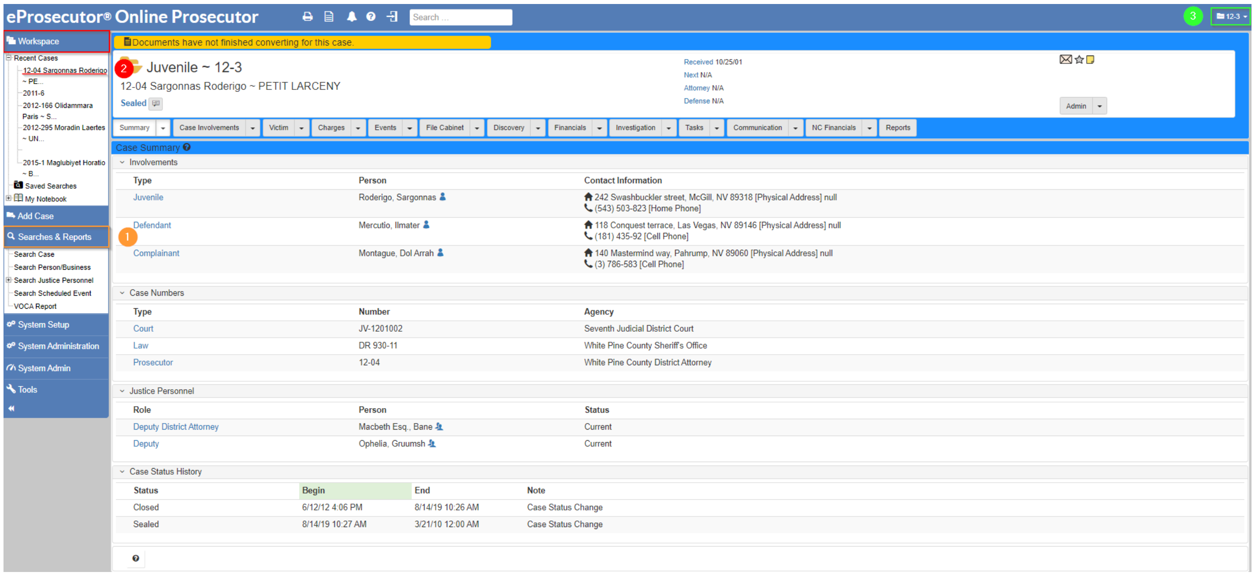
These data points (and more) make up a typical case.

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**:

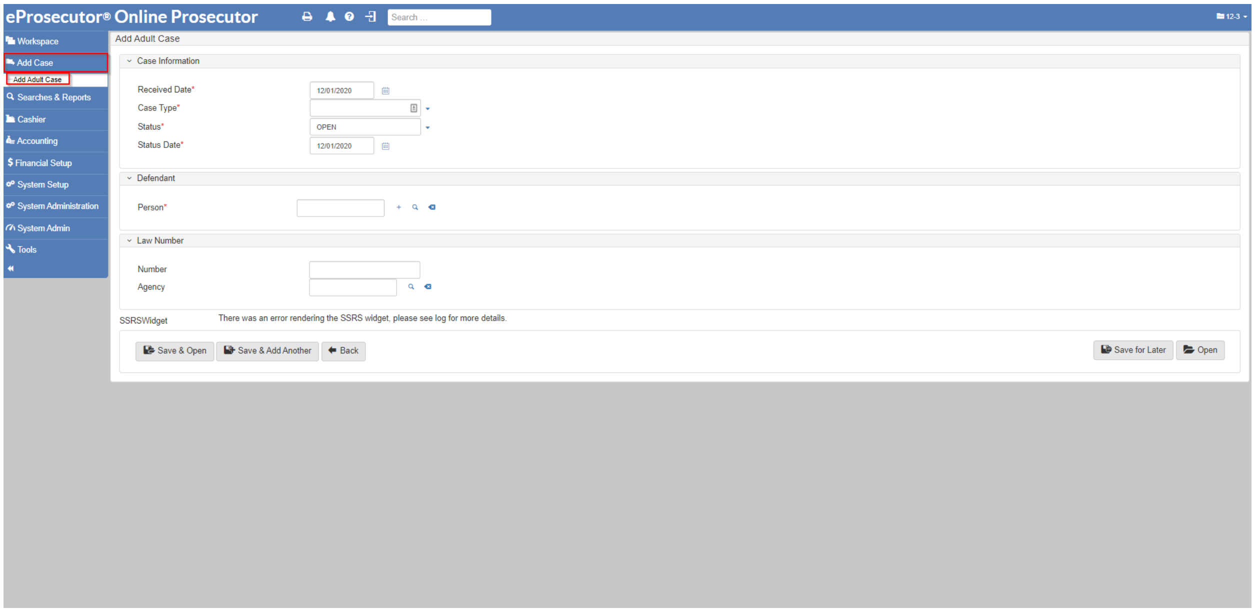


1. Through the **Case Search** found in the **Left navigation › Searches & Reports › Search Case** and filling in case information.

2. If the current user has assigned cases, the view pops up in **Workspace › Recent Cases › Select Case.**
3. Clicking the most recent case in the top right corner.

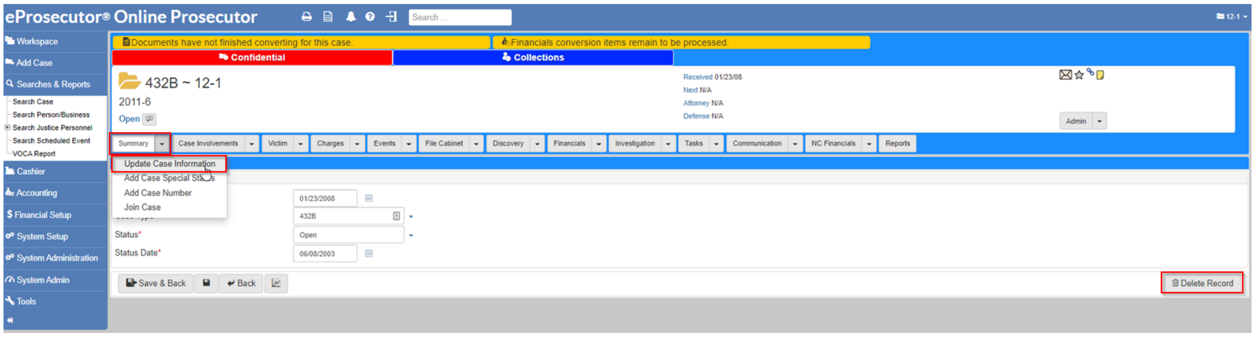
Create a case

Creating a case can be done by navigating to **Left navigation › Add Case** and selecting the case desired from the menu options. Case numbers are generated by eProsecutor Online. 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 Record]** in the lower right corner.

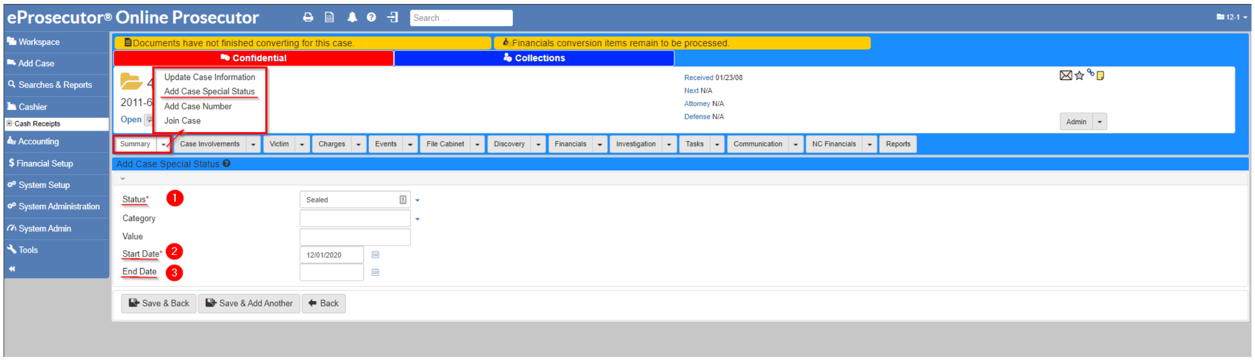


For more information on accessing the case folder view, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.

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**, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.

Fields



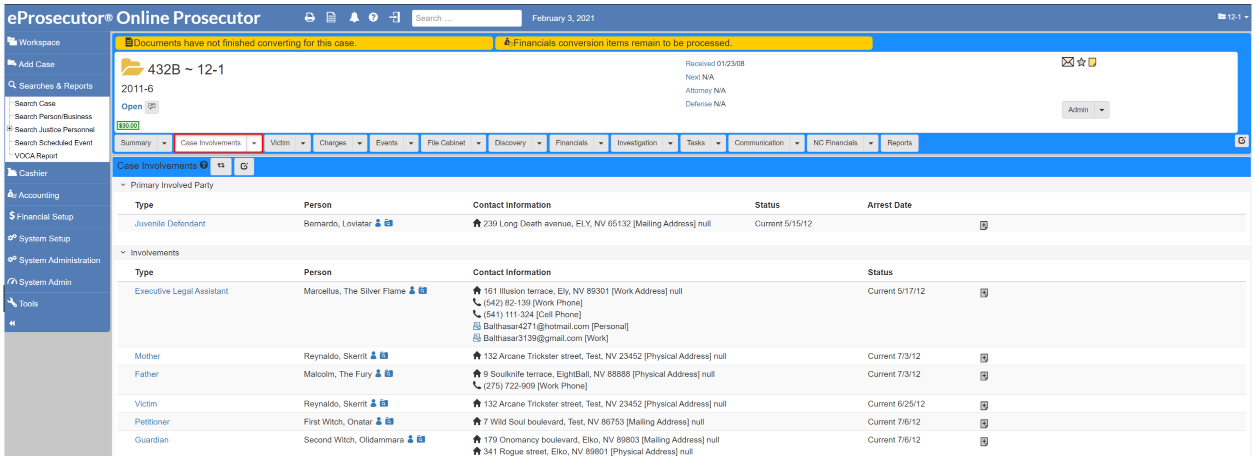
1. **Status**: the status of the seal.
2. **Start Date**: The date the seal goes into affect.
3. **End Date**: The date the seal is removed. If end date is left blank, the case is sealed indefinitely.

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

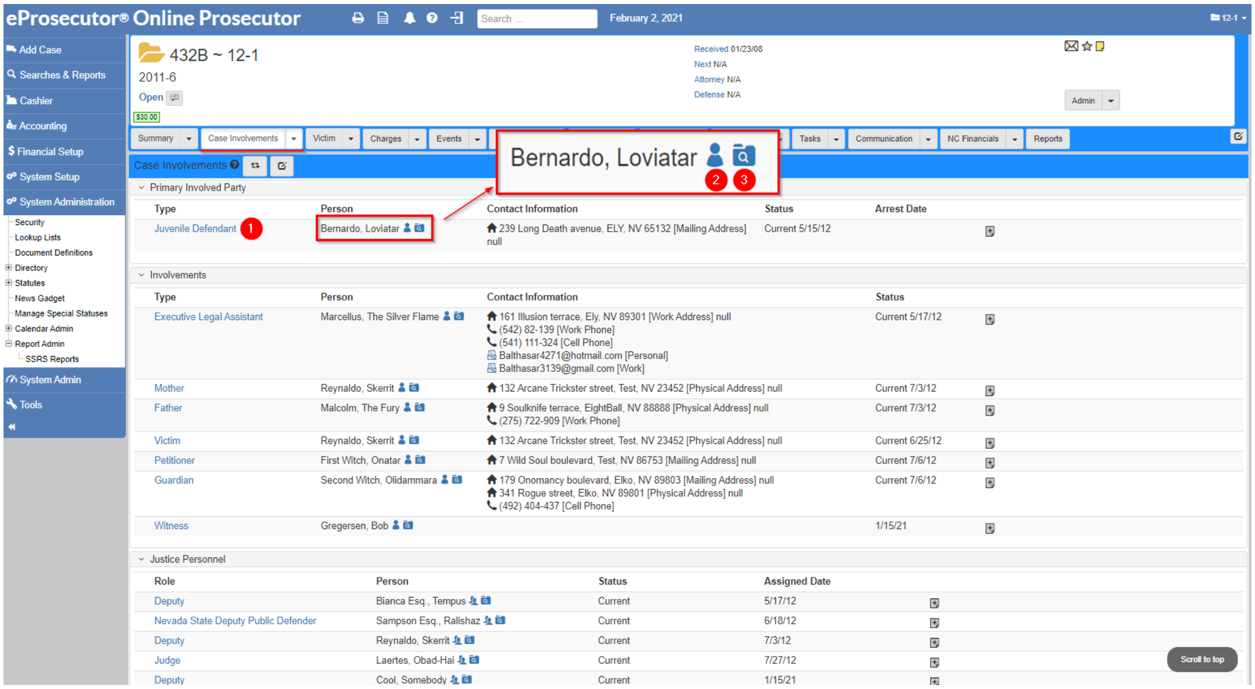
Case involvements

The **Case Involvements** page shows all the individuals involved in a case (including directory personnel, defendant, victim).

Case involvements can be found under the **Case Involvements** tab in of the **Case Folder View**. For more information on navigating to the **Case Folder View**, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.



Updates

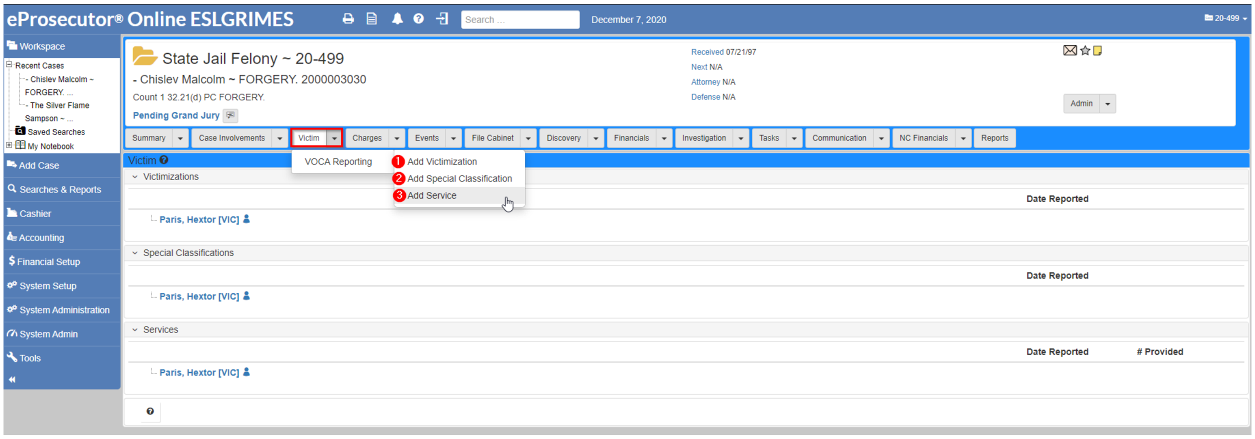


1. Involvements can be updated by clicking the involvement type, which shows the **Update** screen where you can change the involvement type, person, status and more.
2. The person/directory person record can be shown by clicking the person icon.
3. Click the folder icon to show a dialog with all involvements of the selected individual in the current database.

Refer to Person and Directory person for more information.

Victim

The **Victim** tab on the **Case Folder View** shows all case information about the victimizations, special classifications, and services provided to victims.



The **Victim** tab can be accessed by clicking **[Victim]**.

Refer to Case folder views for more information.

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:

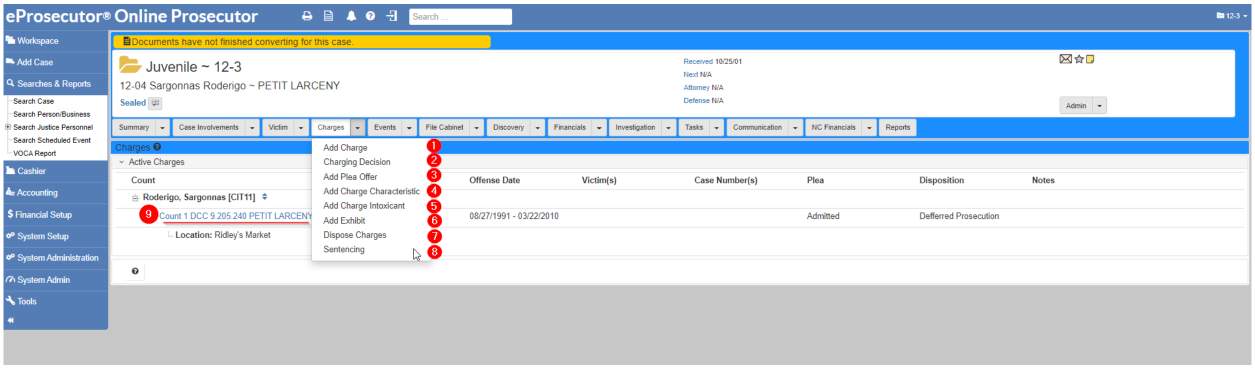
1. **Add Victimization**: Adds victimization type.
2. **Add Special Classification**: Adds a special classification of victimization, for example **Homeless**, **LGBTQ**, **Veteran**, and others.
3. **Add Service**: Add a service provided to the victim.

Refer to VOCA report for more information.

Charges

Charges can be accessed by clicking the **Charges** tab in the **Case Folder View**. Refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html for information on how to navigate to the **Case Folder View**.

The **Charges** screen shows charges connected to the defendants on a case. The screen also includes plea offers, sentencing, charge characteristics, intoxicants, and exhibits. All this information can be updated by clicking the links next to the data:



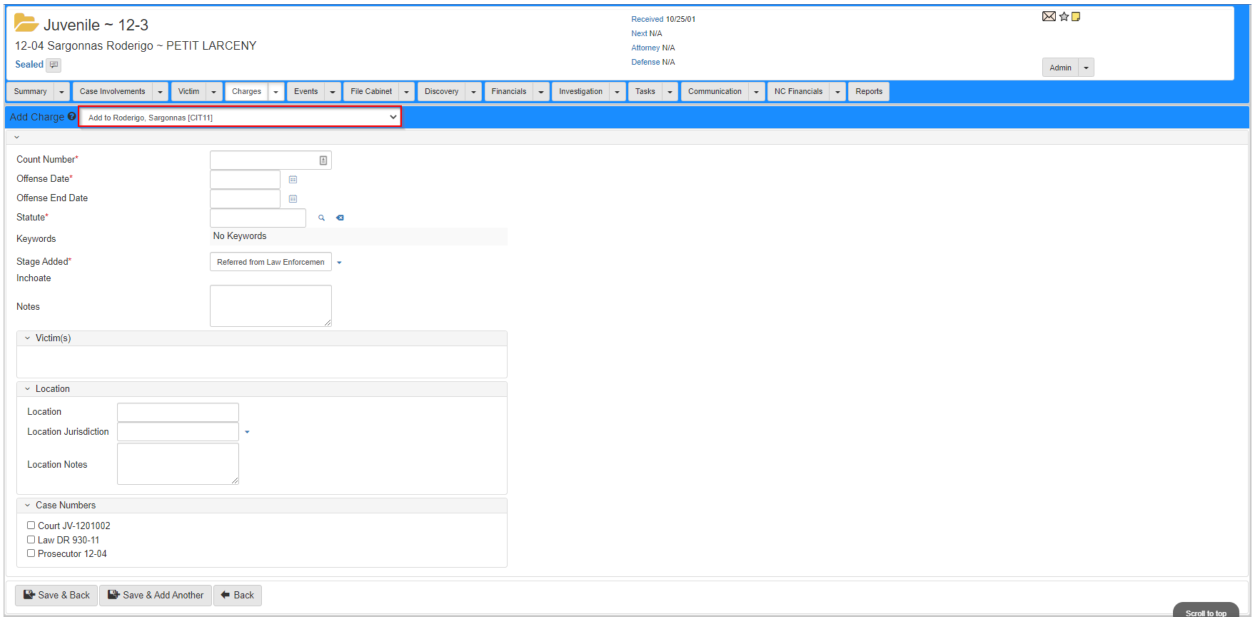
Other options can be selected from the **Charges** tab dropdown, including:

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**

For more information on Charging, refer to Charging.

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.



Exhibits

Exhibit tracking is vital for prosecutors. It is required for legal compliance, integrity of evidence, and chain of custody. Once an exhibit is added:

- You can track the exhibit location and status throughout the life of the case.
- The **Charge Folder View** shows the exhibit and tracking information:

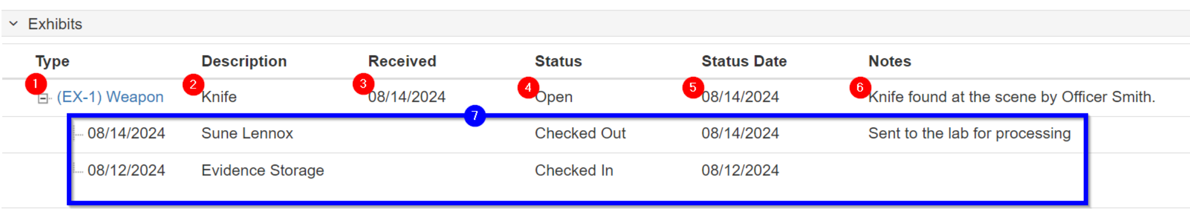


Figure 1. Exhibit and exhibit tracking information.

1. **Exhibit Number and Type**
2. **Exhibit Description**
3. **Exhibit Received Date**
4. **Exhibit Status**
5. **Exhibit Status Date**
6. **Exhibit Notes**
7. **Exhibit Tracking information** shown with the most recent records first:
    a. **Exhibit Tracking Entered Date**
    b. **Exhibit Location**

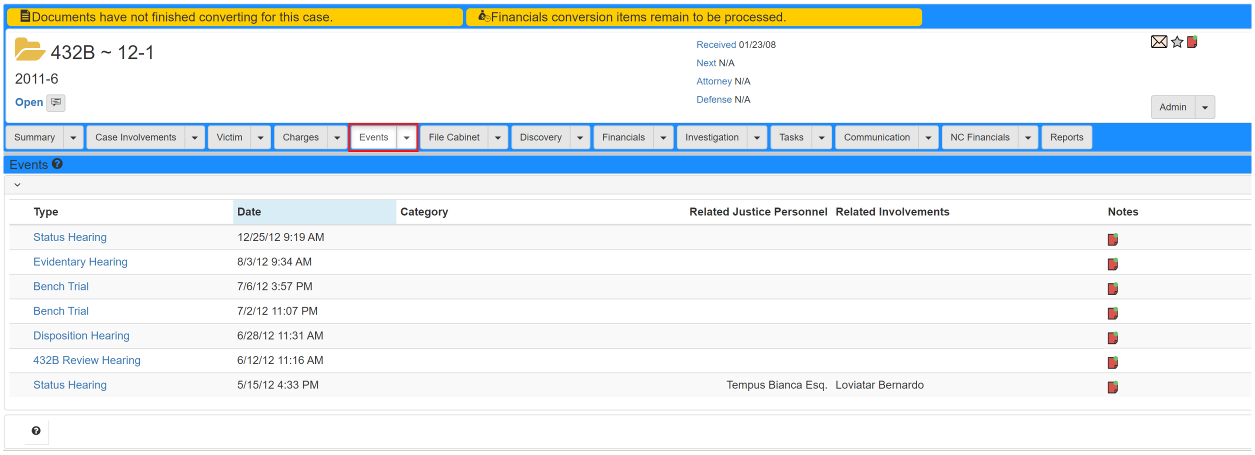
c. **Exhibit Tracking Status**

d. **Exhibit Tracking Status Date**

e. **Exhibit Tracking Notes**

Events

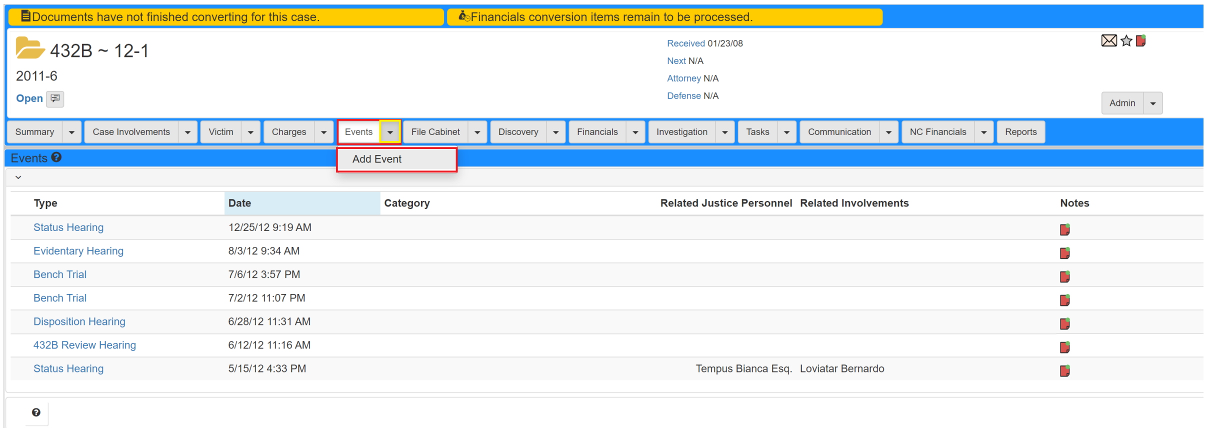
Events can be accessed by clicking the **Events** tab in the **Case Folder View**.



Refer to Case folder view for more information.

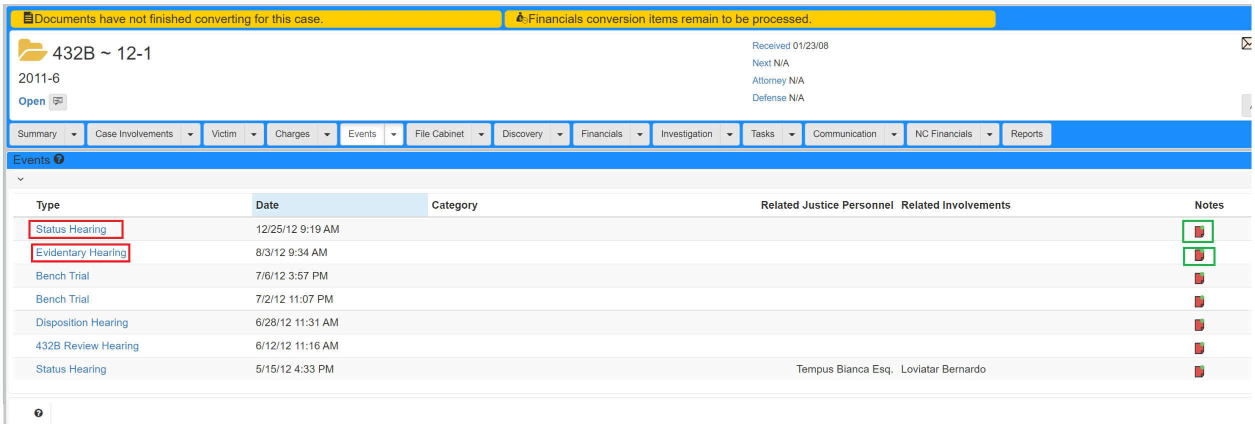
To add an event:

1. Click the **Events** dropdown and select **Add Event**:



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

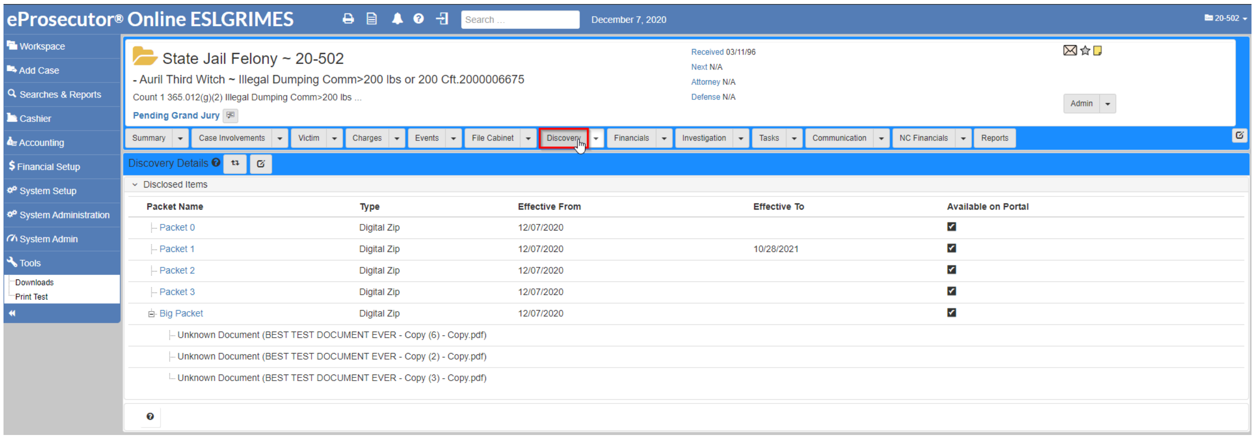
After the creation of an event, a user can edit and add notes. Notes can be added by clicking the notes icon for the corresponding event, shown in green:



Notes added on each event are also added to the case notes. Edit an event by clicking the case type, shown in red, in the **Type** column.

Discovery

The **Discovery** tab in the **Case View** shows all the discovery packets, or sharable documents, for public or external agency view. Discovery packets can be shown by clicking the **Discovery** tab on the **Case Summary** screen.

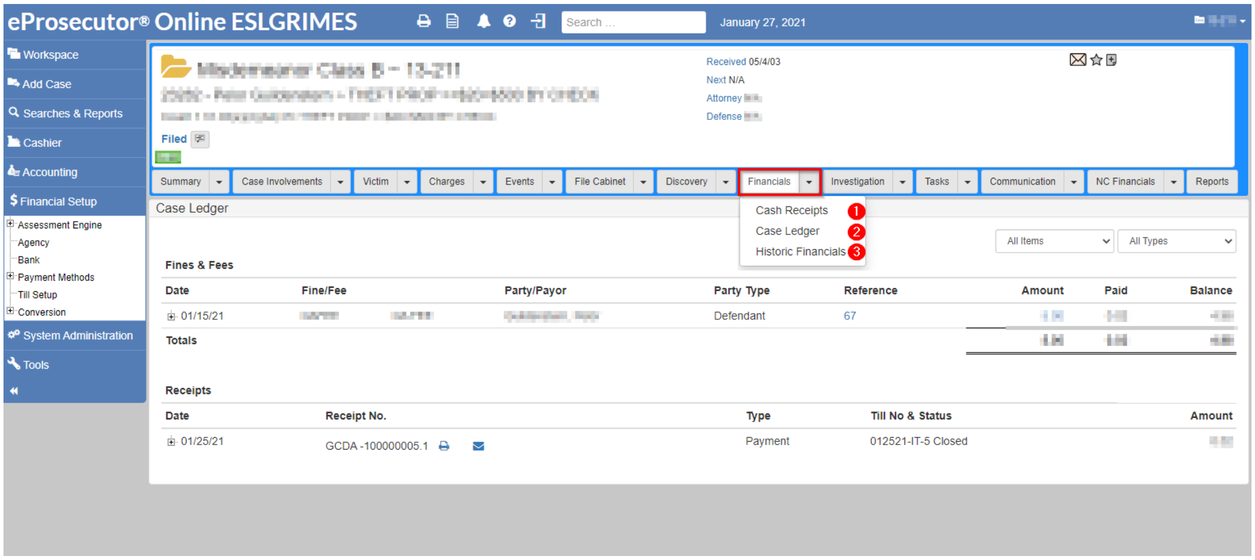


For more information, refer to:

- https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html
- Create
- Discovery packets

Financials

Case financials consist of three different screens:



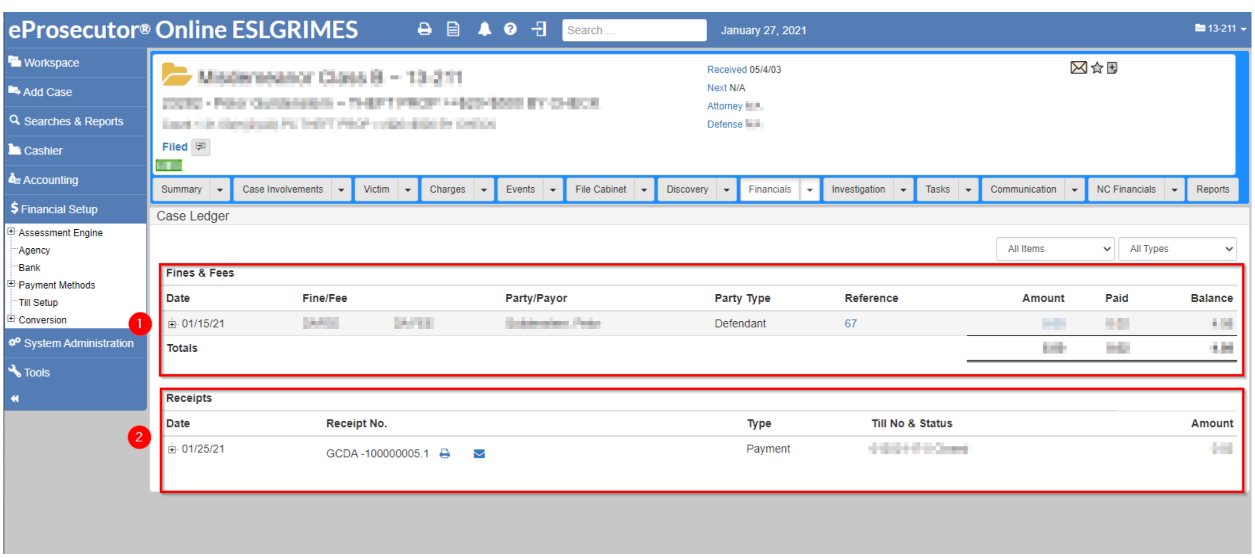
1. **Cash Receipts**
2. **Case Ledger**
3. **Historic Financials**

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.



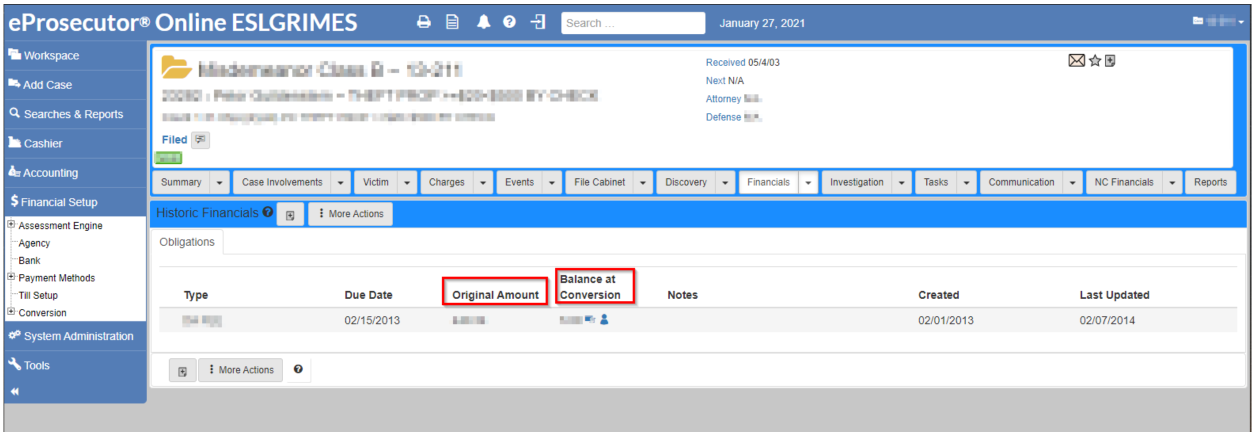
1. The **Case Ledger Folder View** shows the fines and fees associated with the current

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 eProsecutor Online 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).



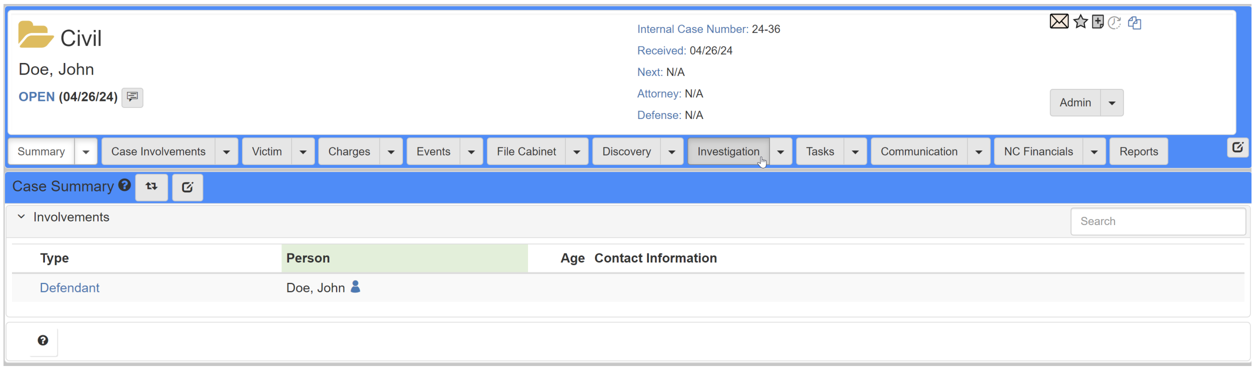
Investigation

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

The investigation folder can be accessed on the case folder view by clicking the **Investigation** tab.

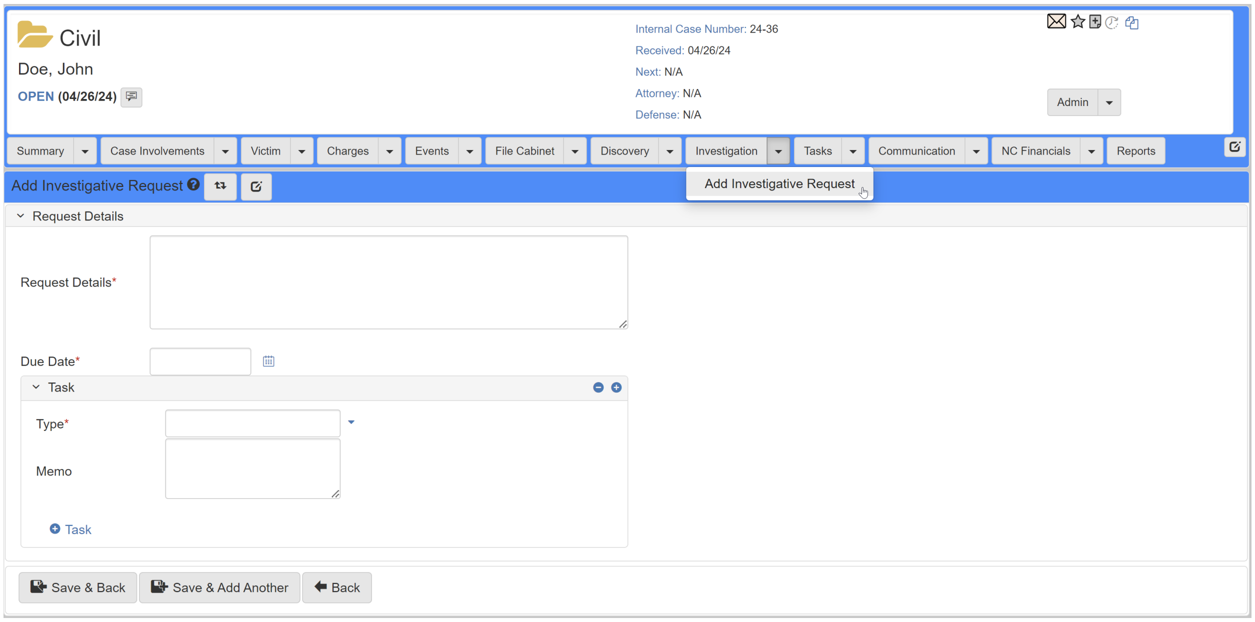
Refer to Case folder view for more information.

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 and selecting **Add investigation request**. Required fields are marked with a red asterisk. Adding a task to the request is optional.

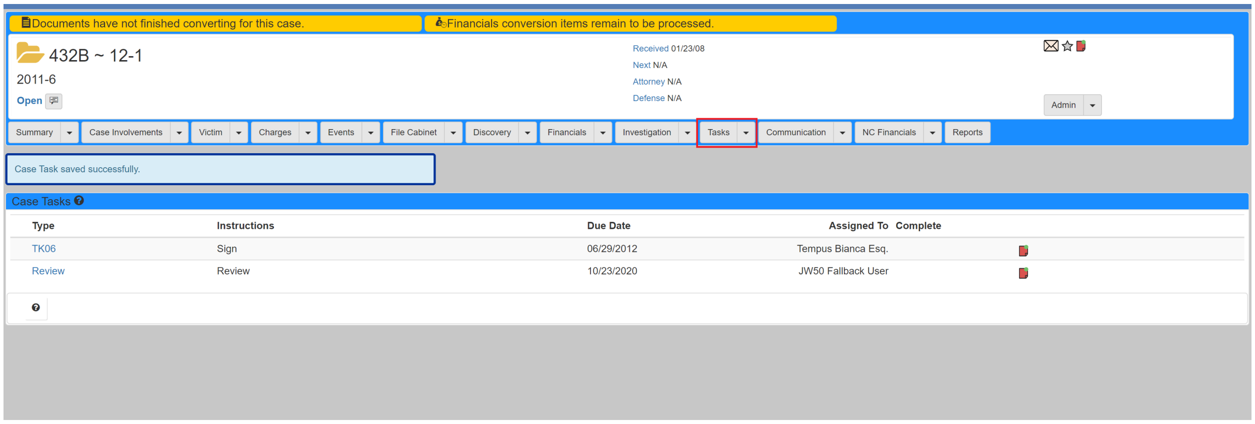


Once a request is made it can be assigned to an individual.

Tasks

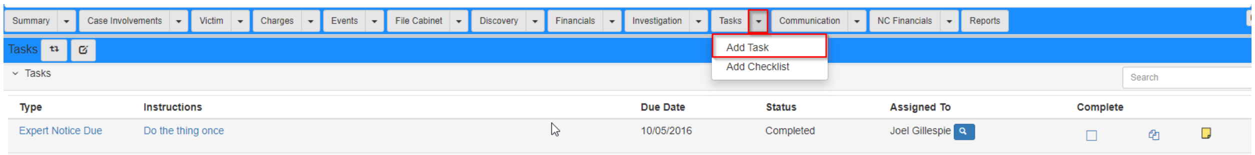
Tasks can be added to a case and assigned to an individual. To navigate to the tasks from the **Case View**, click the **Tasks** tab.

Refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html for more information.

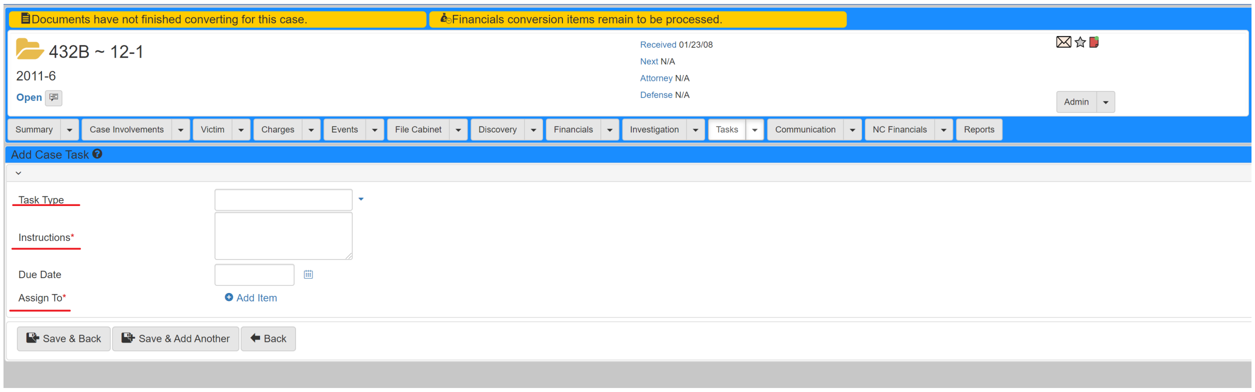


Add a task

Tasks are added by clicking the **Tasks** dropdown and selecting **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, you can select the **Complete** to remove the workspace item or use the **Done** result in the workspace.

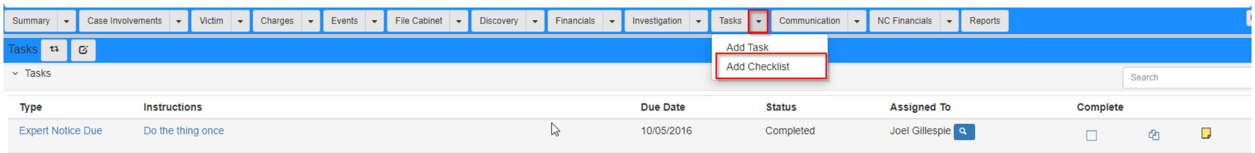
Checklists

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

Add a checklist

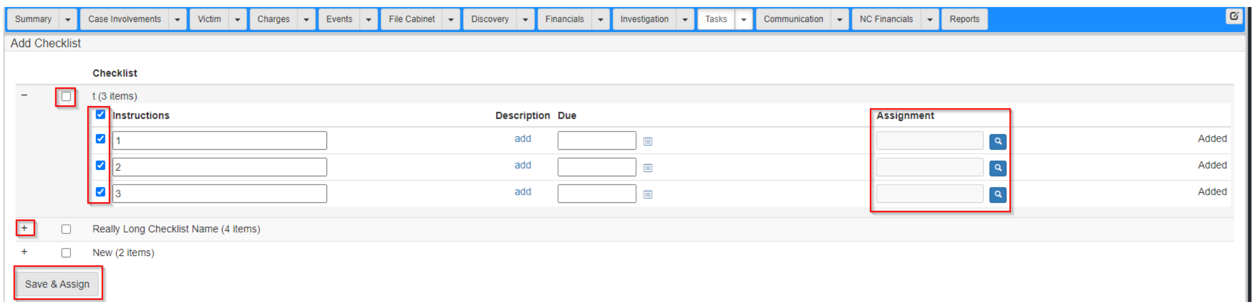
Checklists are added to cases by clicking the **Tasks** dropdown and selecting **Add**

Checklist.



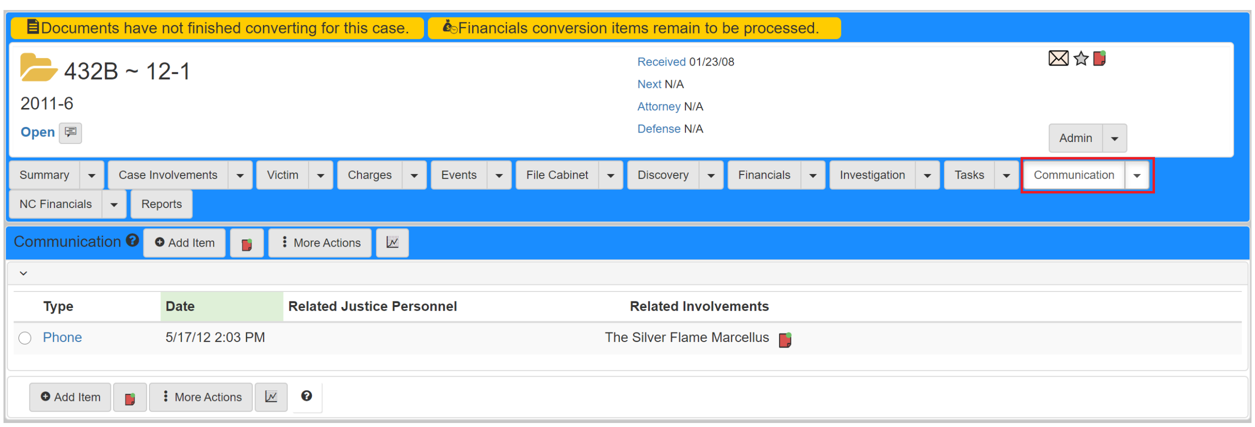
The add checklist screen allows the user to select all the checklists or elements of the checklist to add. Cases do not allow duplicate checklist items.

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



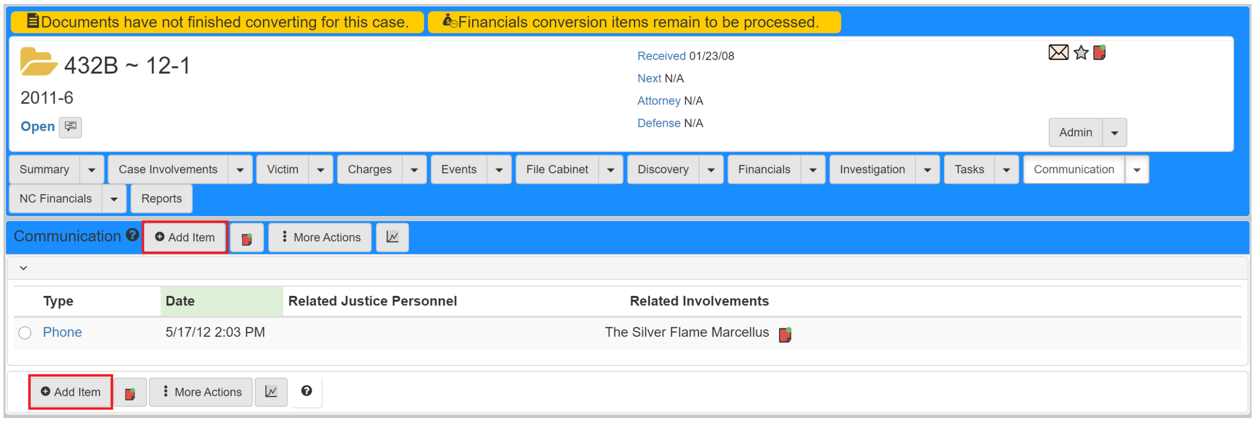
Communication

The **Communication** tab has all documented communication between legal personnel and involvements. Communications can be accessed by clicking **[communications]** on the **Case Folder View**.



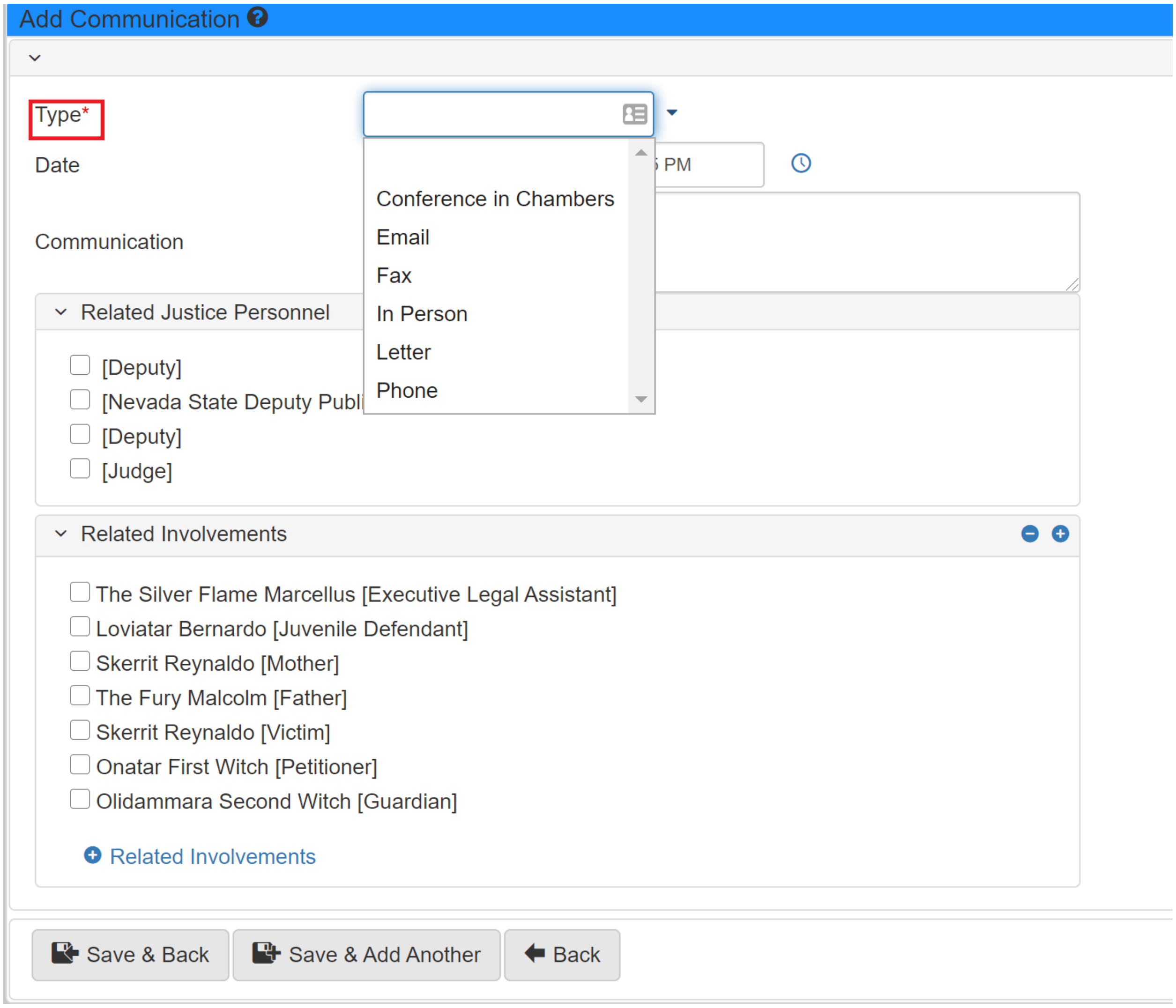
For information on how to access the case view, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.

The main area of the **Communications** tab shows all the documented communications added to the case. To add an item, click **[Add Item]** on top or bottom of the page:



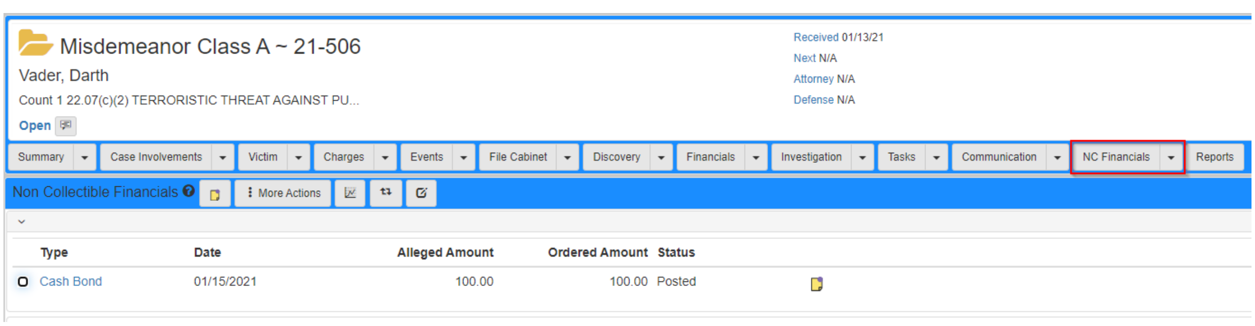
Add item

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.

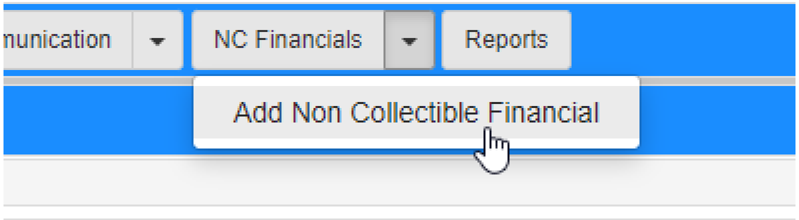


The **Non-collectible Financials Folder View** can be accessed on the **Case Folder View** by clicking the **NC Financials** tab. For information on navigating to the **Case Folder View**, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.

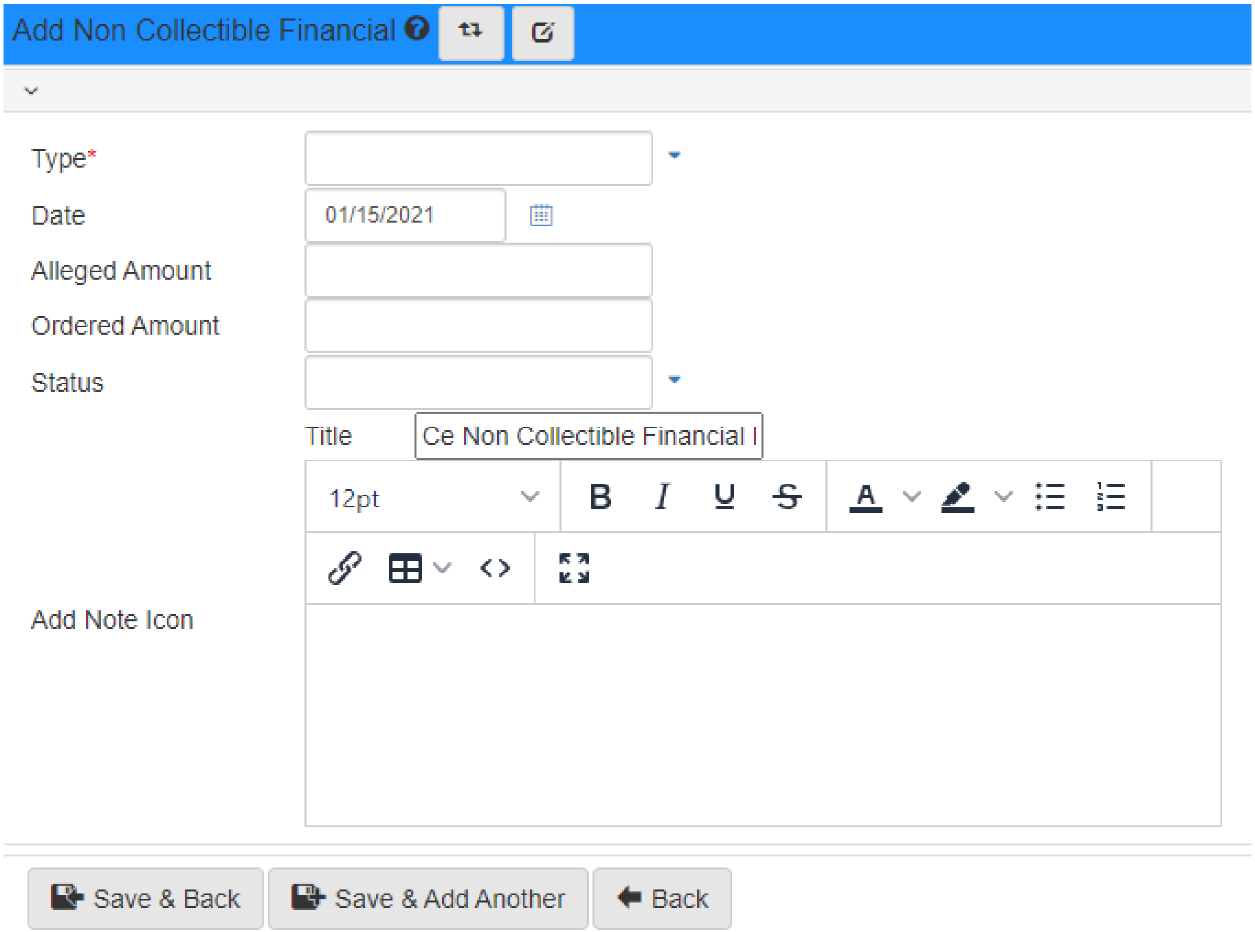
Click the **Type** value on a row to edit that non-collectible financial.

Add a non-collectible financial

A non-collectible financial can be added by clicking the **NC Financials** dropdown and selecting **Add Non-collectible Financial**:

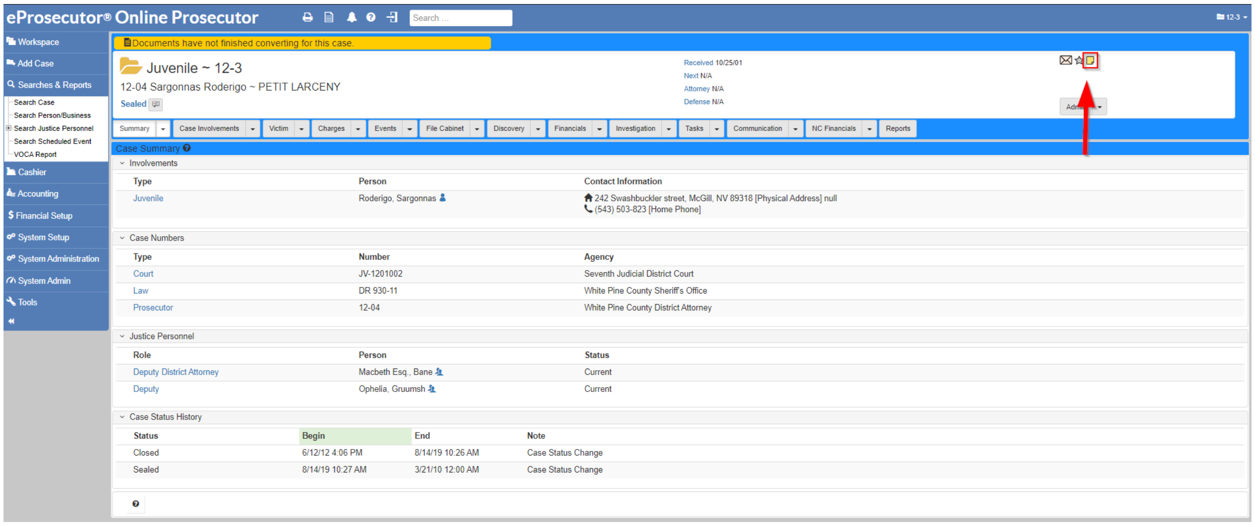


Required fields are marked with a red asterisk.

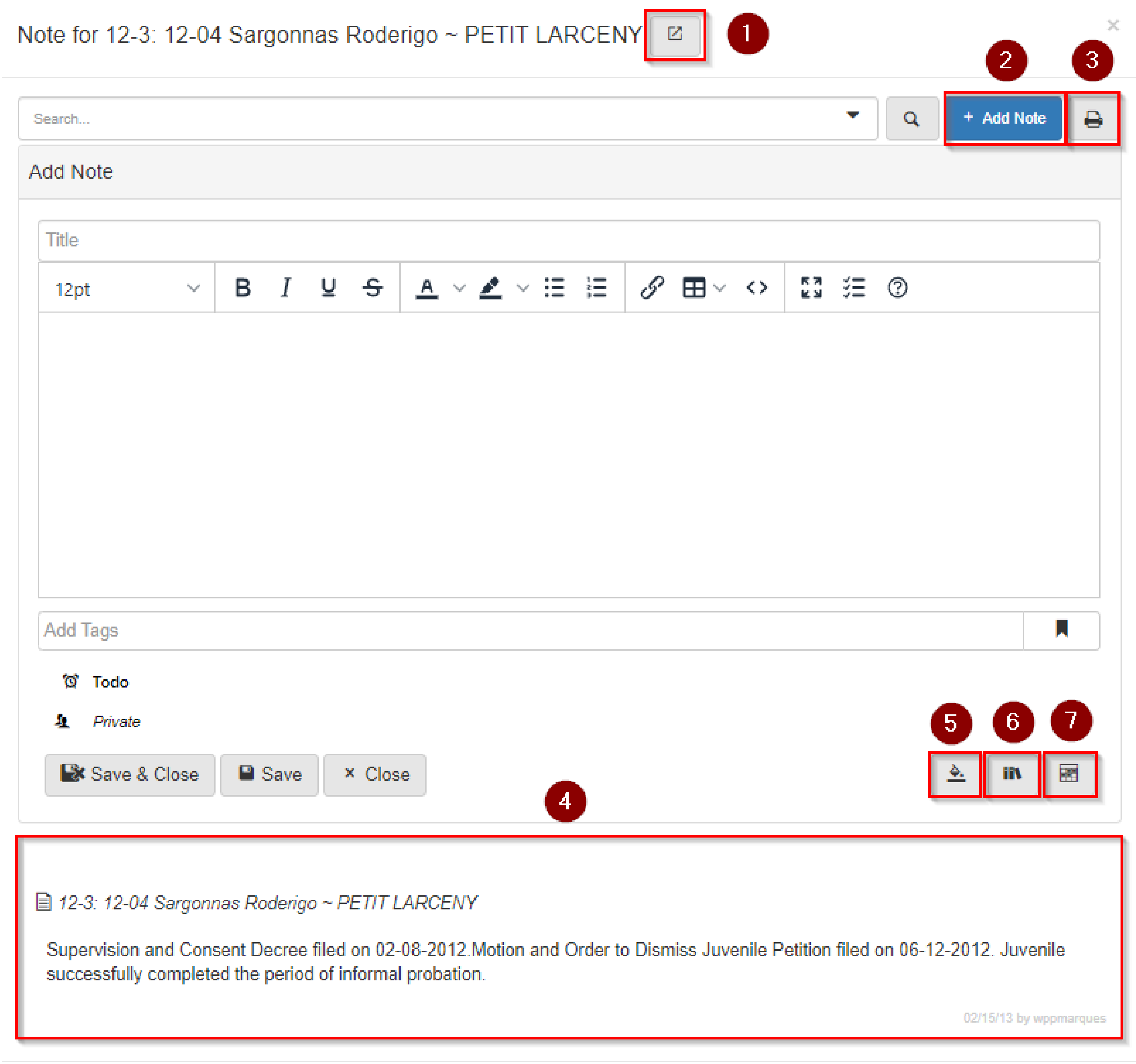


Case notes

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**, refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/index.html.



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



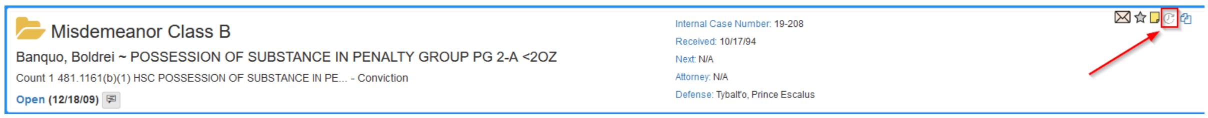
1. Click to close the dialog and open the case notes in a new browser tab.
2. Click to add a new note to the case.
3. Click to open a printable screen with the case note.
4. Click a case note to edit it.
5. Click to select the note background color.
6. Click to add a macro to the note.
7. Click to set active dates for the note.

Case ticklers

A **Case Tickler** is a reminder system built into eProsecutor Online to give reminders of important dates. A tickler is set from the **Case Header** and allows users to configure the number of days in the future or an expiration date. On the expiration date, an alert is generated in the system with the reminder text.

Create a tickler

- Open a case.
- Click the **Tickler** icon in the **Case Header**.



The Tickler icon color updates to give quick information about tickler status:

Icon	Description
	**Gray**: No active or expired ticklers exist on the current case.
	**Green**: There is an active tickler on the current case.
	**Red**: There is an expired tickler on the current case. Once the generated alert is dismissed, or deleted, the color reverts to gray.

- Clicking the **Tickler** icon opens a window showing all the current case ticklers. From this screen, a user can also edit or delete existing ticklers.

- Click **[Add Case Tickler]**. This opens a dialog to add a new tickler:
  - Optional: set the number of days out. This populates the **Expire Date** field.
  - Set the **Expire Date** field. This is the date an alert is generated using the **Reason**.
  - Set the **Reason** field. This is the message to show with the alert.
- Click **[Submit]**.

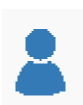
Show existing ticklers

Use one of the following approaches to show an existing tickler:

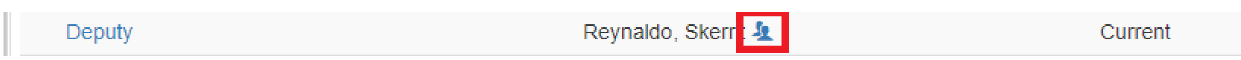
- Open a case and click the **Tickler** icon.
- Use the Case ticklers gadget on the Dashboard.

Person

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



A **Directory Person** is indicated by a double-person icon:

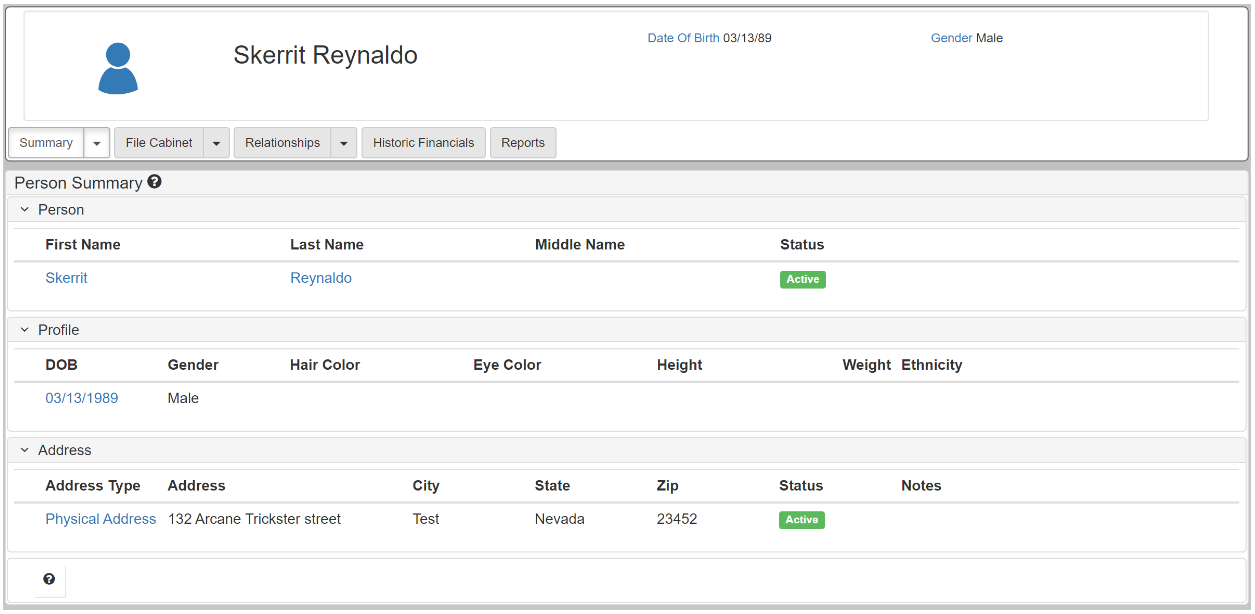


Access the **Person Folder View** by clicking the **Person** icon, or clicking a **Person** in the **Person/Business** search.

The **Person** view is split into five different sections:

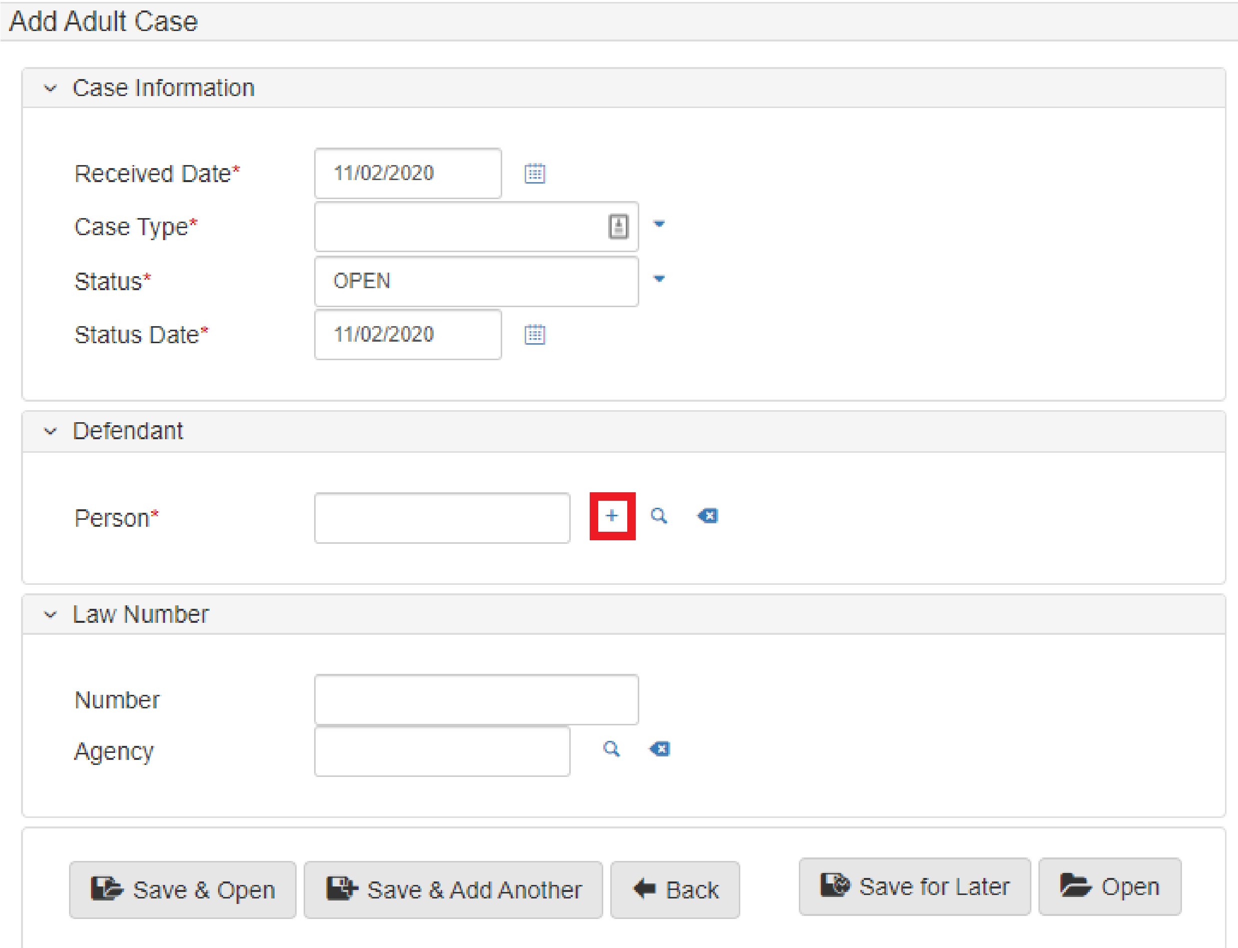
1. **Summary**: Shows basic information on the selected individual, for example **First Name**, **Last Name**, **DOB**, and **Address**.
2. File cabinet.
3. https://documentation.journaltech.com/eProsecutorOnline/user/person/relationships.html.
4. https://documentation.journaltech.com/eProsecutorOnline/user/person/historical_financials.html.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

The **Summary Folder View** shows all general information about the individual:

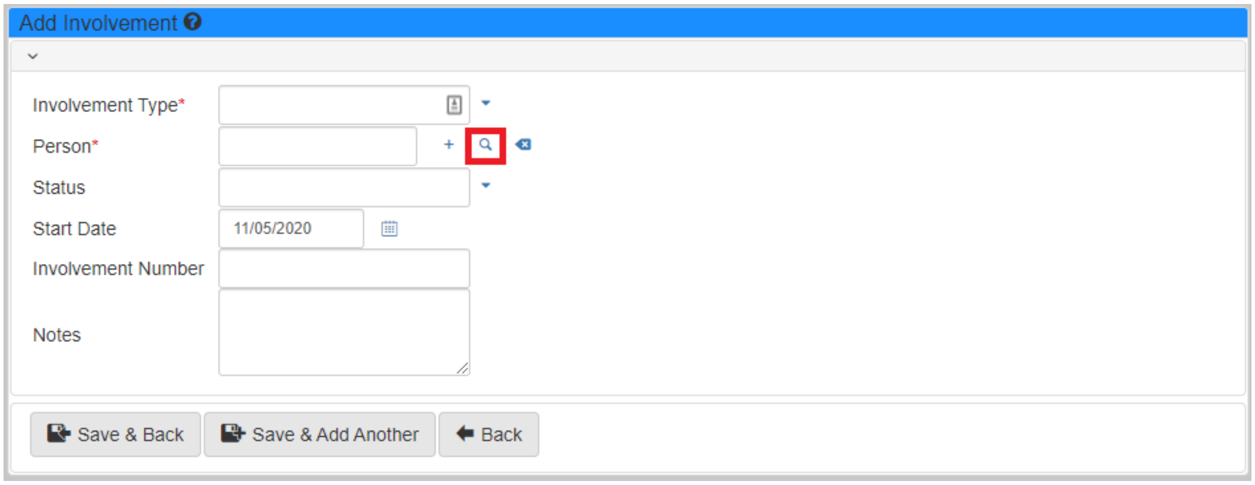


Create

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



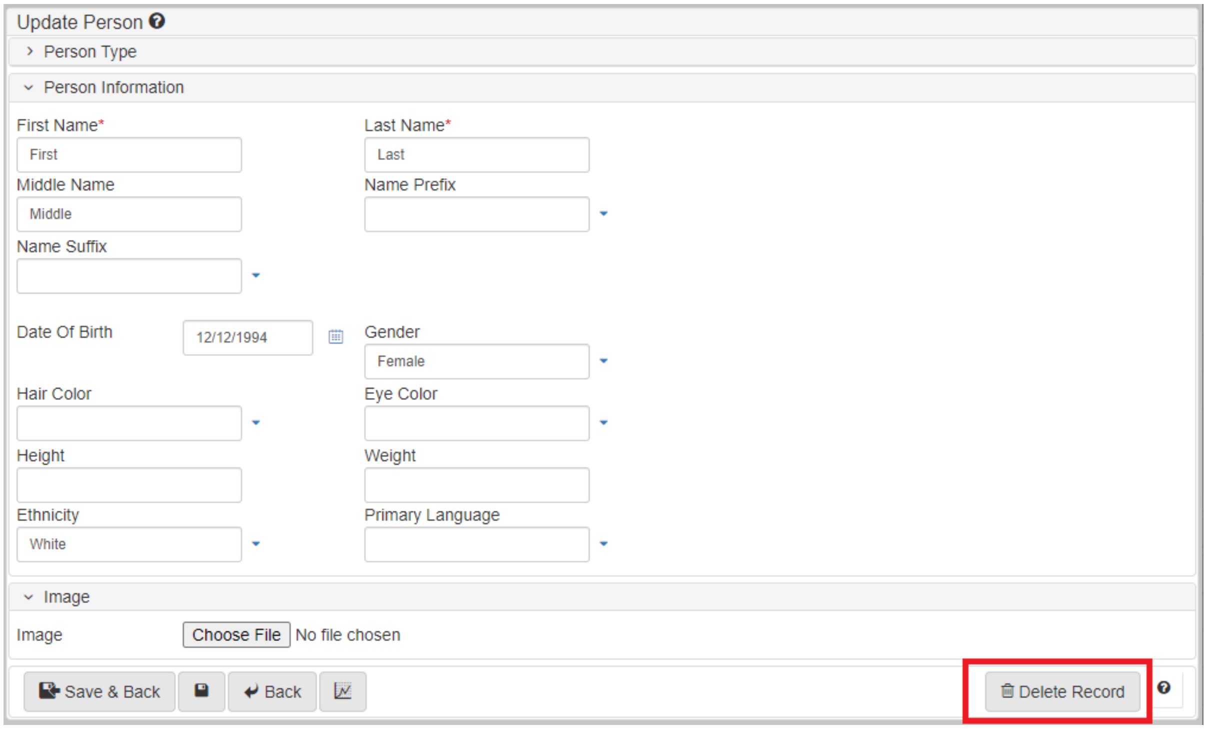
After saving, you can add a **Person** to cases. Click the **Search** icon and find the stored person:



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:

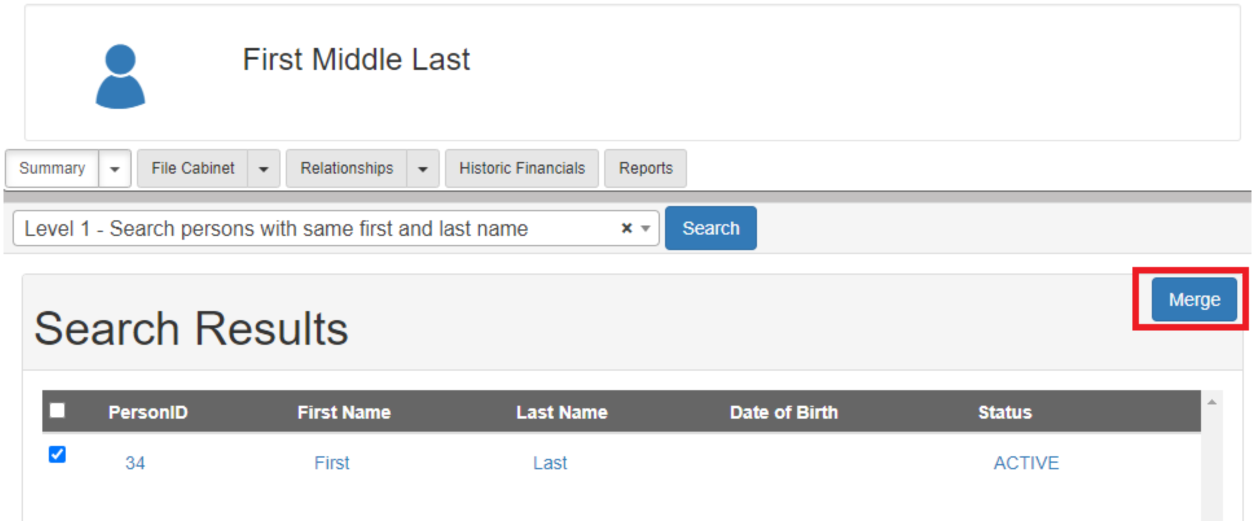


Merge

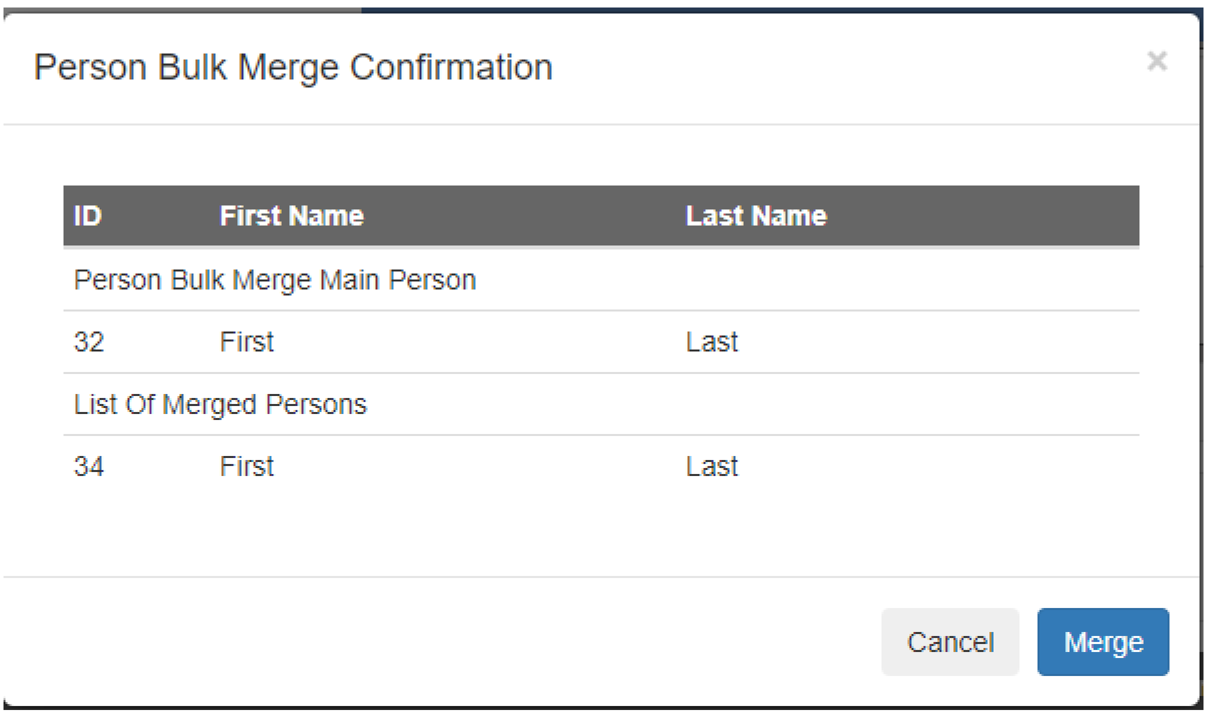
When multiple records of the same individual exist in the system, those records can be merged into one **Person** record. Merging **Person** records can be done in the **Person Folder View**, in the **Summary** dropdown by selecting **Person Merge**. To merge **Person** records, a search level needs to be set to match potential duplicate records:

Level	Search criteria
Level 1	Select to match first and last names.
Level 2	Select to match first, last, and middle names.
Level 3	Select to match first, last names, and date of birth.

Once the search is complete, select the **Person** records to merge, then click **[Merge]**:



The **Person Bulk Merge Confirmation** dialog opens, so you can review to ensure no errors have occurred:

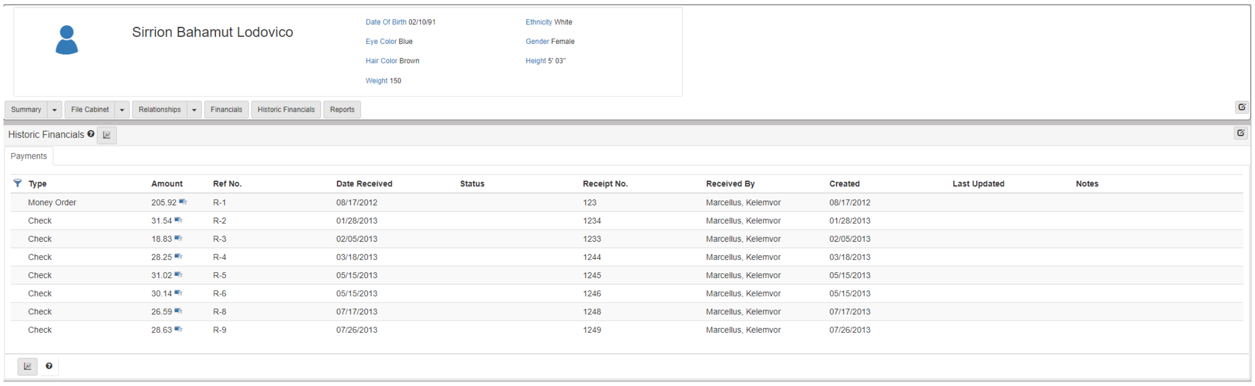


Click **[Merge]** to merge the records.

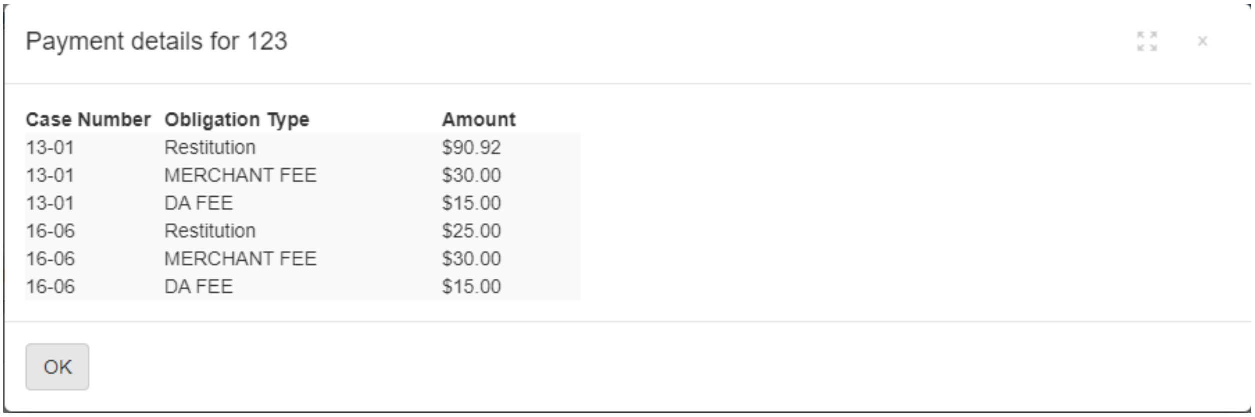
Historical Financials

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/eProsecutorOnline/user/person/index.html.



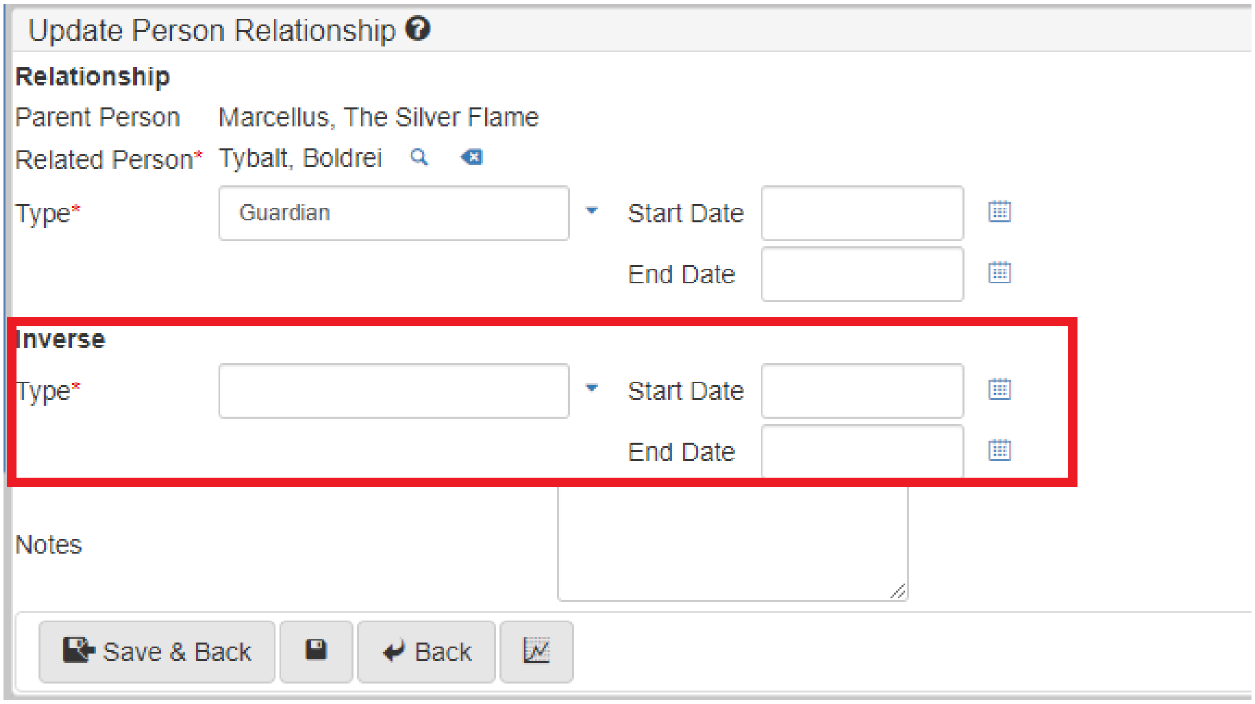
Click to expand the **Payment Details** dialog, showing the obligation type and case number associated with the fine/fee:



For more information on financials, refer to Financials.

Relationships

Relationships between 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.



Documents

There are many ways to interact with documents in eProsecutor Online. This section covers using the **Filing Cabinet** on **Case** and **Person** views, plus using the document manipulation tools. Document manipulation tools include printing, scanning, stamping, signing, redacting, emailing, and annotating.

File cabinet

The https://documentation.journaltech.com/eProsecutorOnline/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/eProsecutorOnline/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/eProsecutorOnline/user/documents/viewer.html makes it easy to review, stamp, redact, sign and annotate uploaded documents in the **Filing Cabinet**.

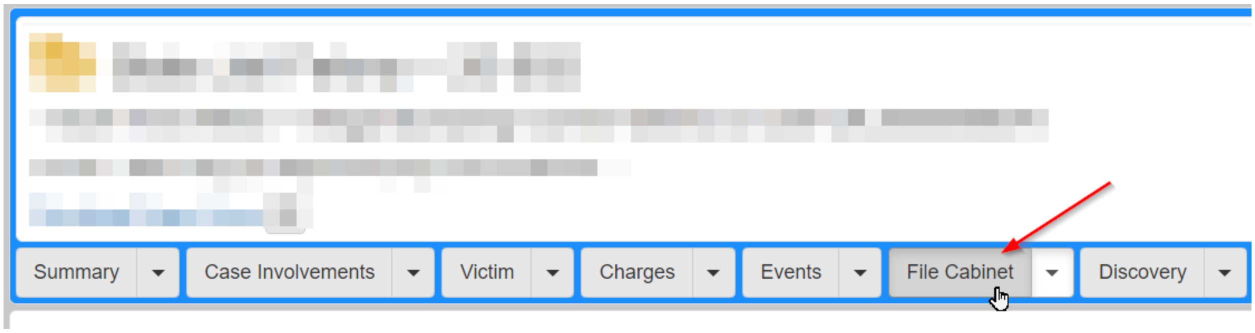
Document scanning

https://documentation.journaltech.com/eProsecutorOnline/user/documents/scan.html allows the user to scan documents into a **Case** or **Person Filing Cabinet**.

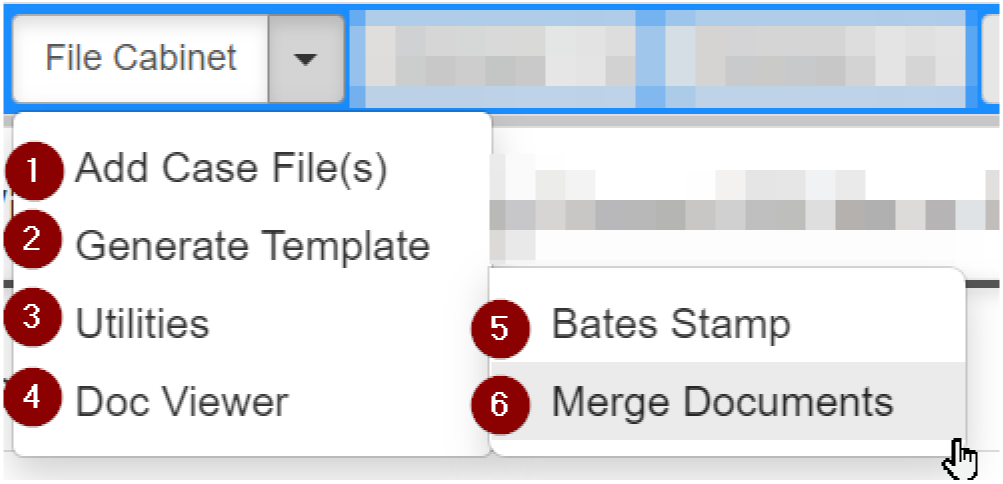
File cabinet

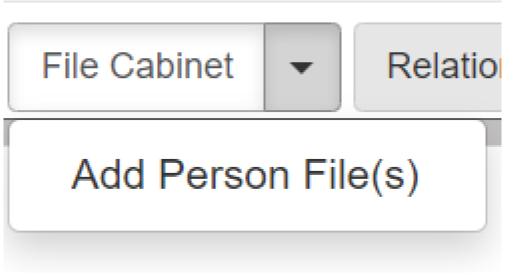
This section describes the **File Cabinet** and its features. This includes the **Case File Cabinet** and the **Person File Cabinet**.

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





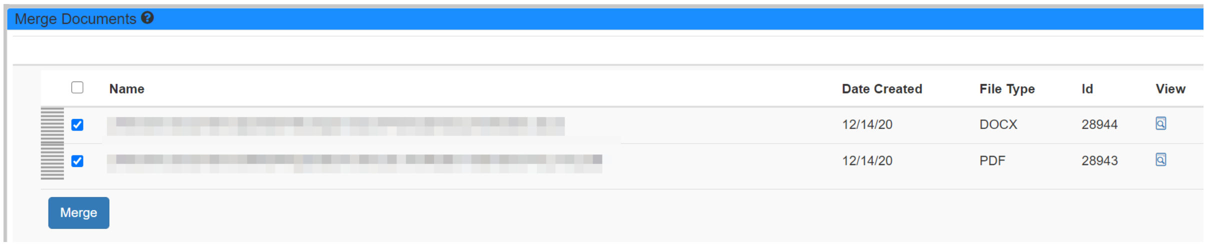
1. **Add Case File(s)** or **Add Person File(s)**: Open the corresponding form to insert a new file.
2. **Generate Template**: Open the generation form to select and generate a document from a template. Refer to https://documentation.journaltech.com/eProsecutorOnline/user/documents/generation.html for 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.

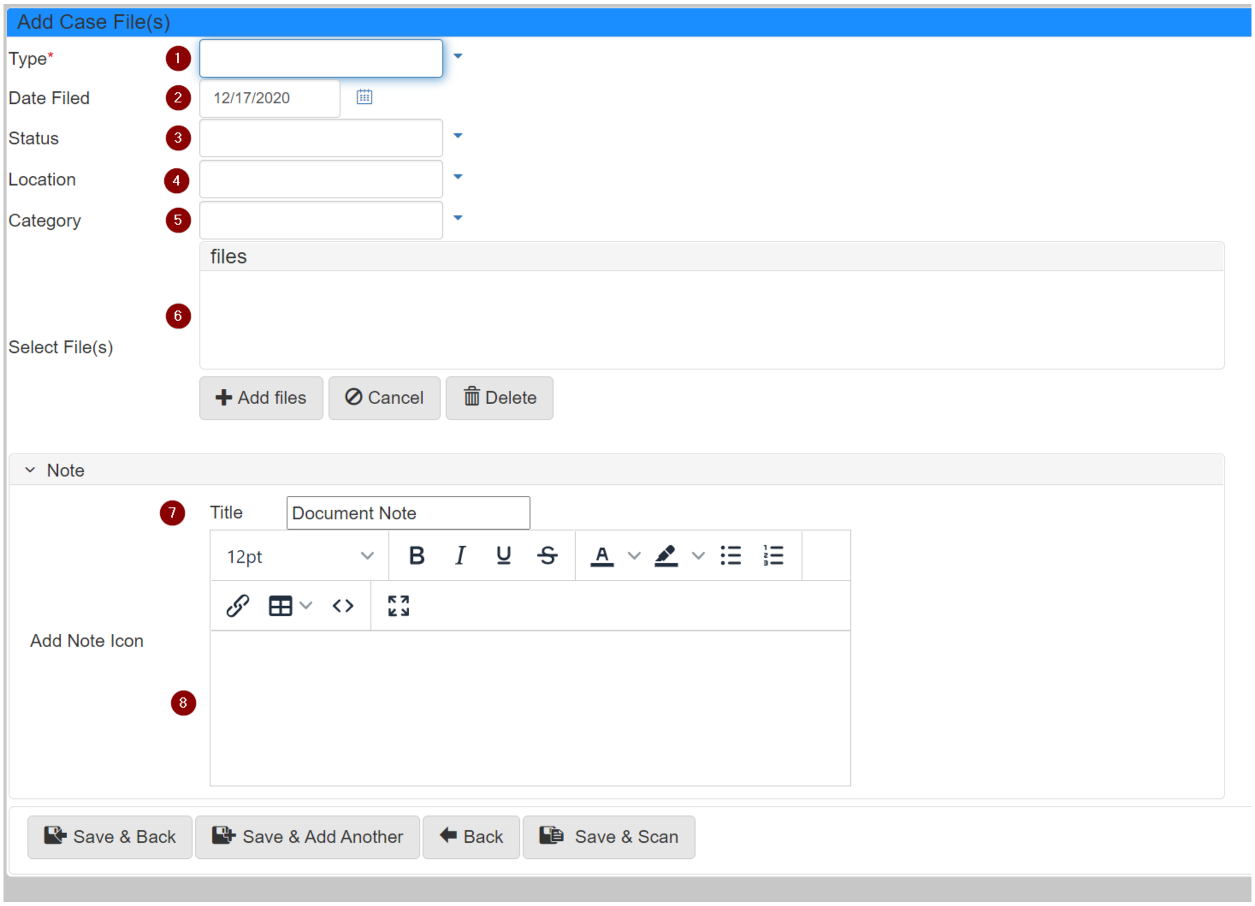


6. **Document Viewer**: View and edit a full preview of a selected file. Refer to https://documentation.journaltech.com/eProsecutorOnline/user/documents/viewer.html for more information.
7. **Status**: Limit results to selected statuses.
8. **Received Date From/To**: Limit results to date ranges.

Add file dropdown

The **Case Add File** and **Person Add File** forms are nearly identical. This section covers the

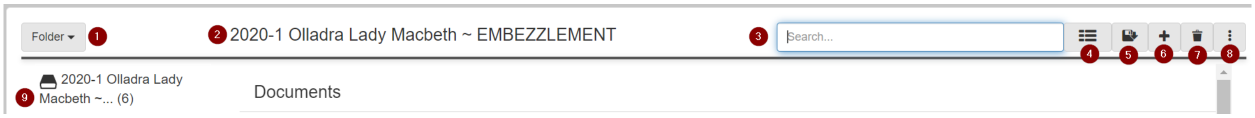
Case Add File form controls. The same principles can be applied to the **Person Add File** form.



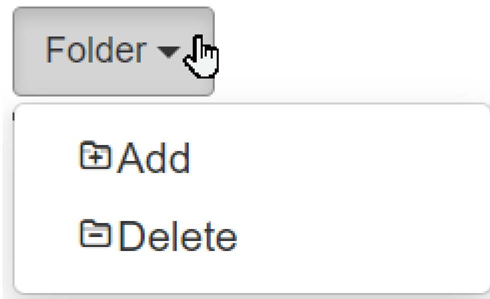
1. **Type**: set the **File Type**. This is unrelated to the file extension, for example `.pdf`.
2. **Date Filed**: set a filing date for the document. Select a date from the calendar dialog.
3. **Status**: set the document status.
4. **Location**: set a physical location or identifier for the document.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

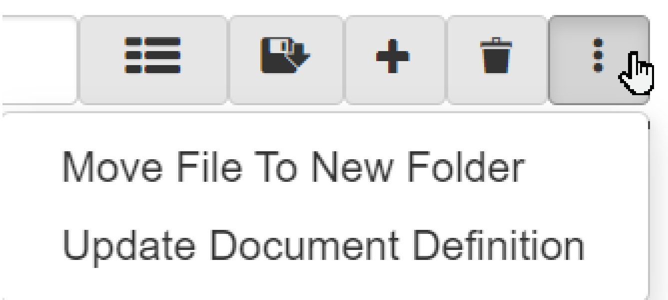
File cabinet controls



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.

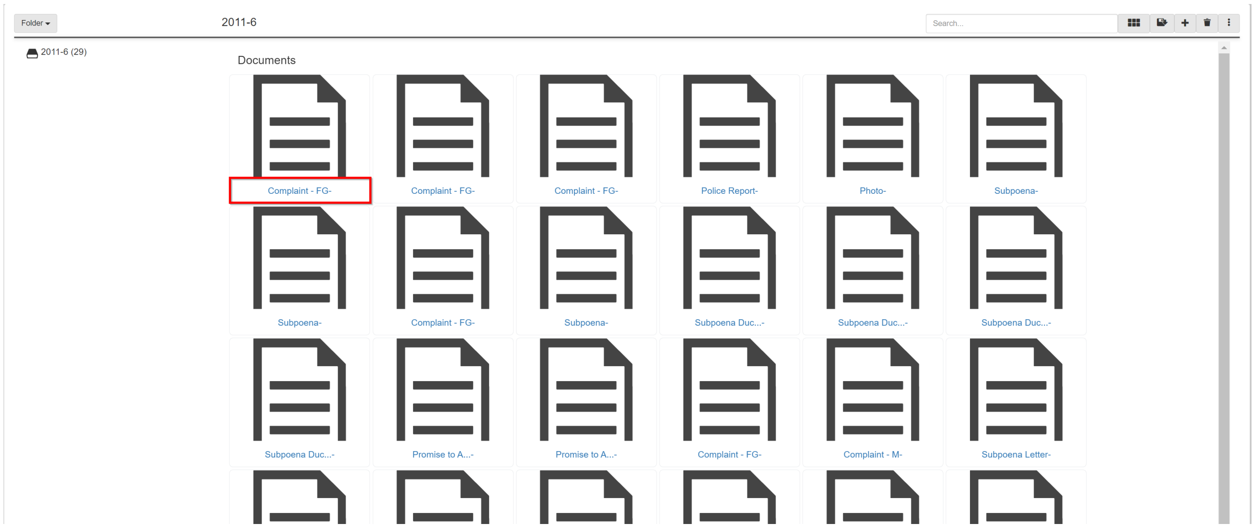


For more information, refer to Document definitions.

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.

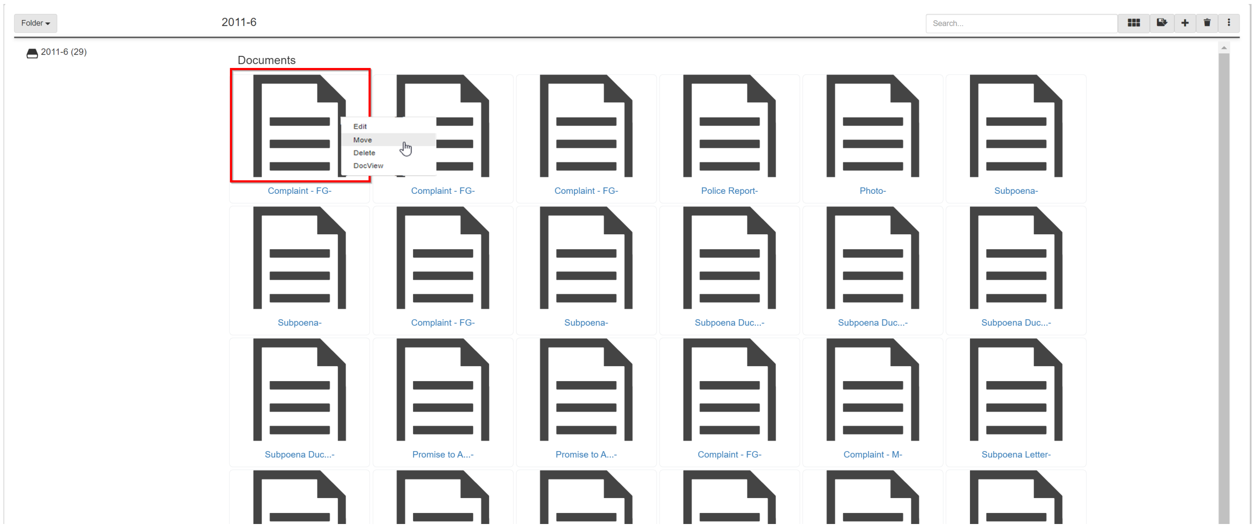
Update or edit file

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



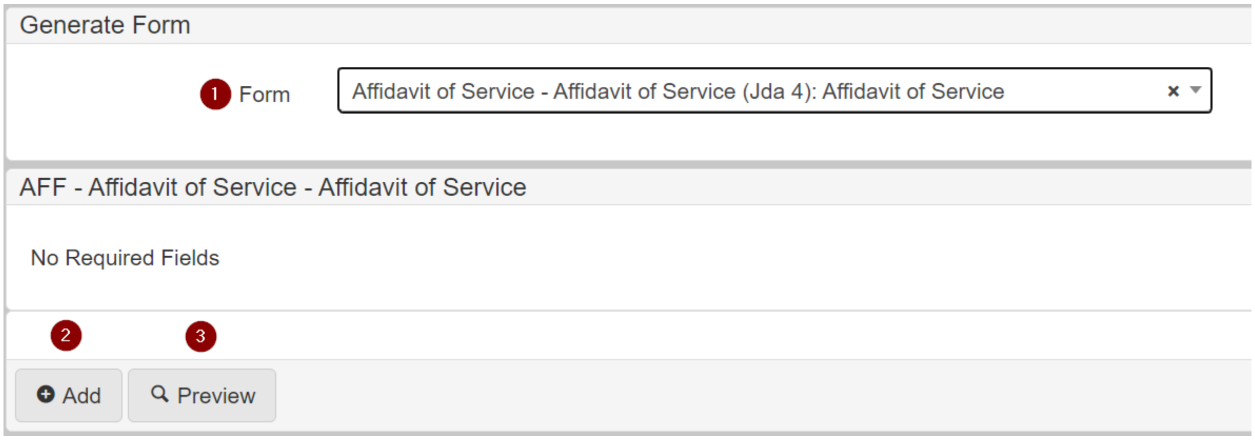
File context menu

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

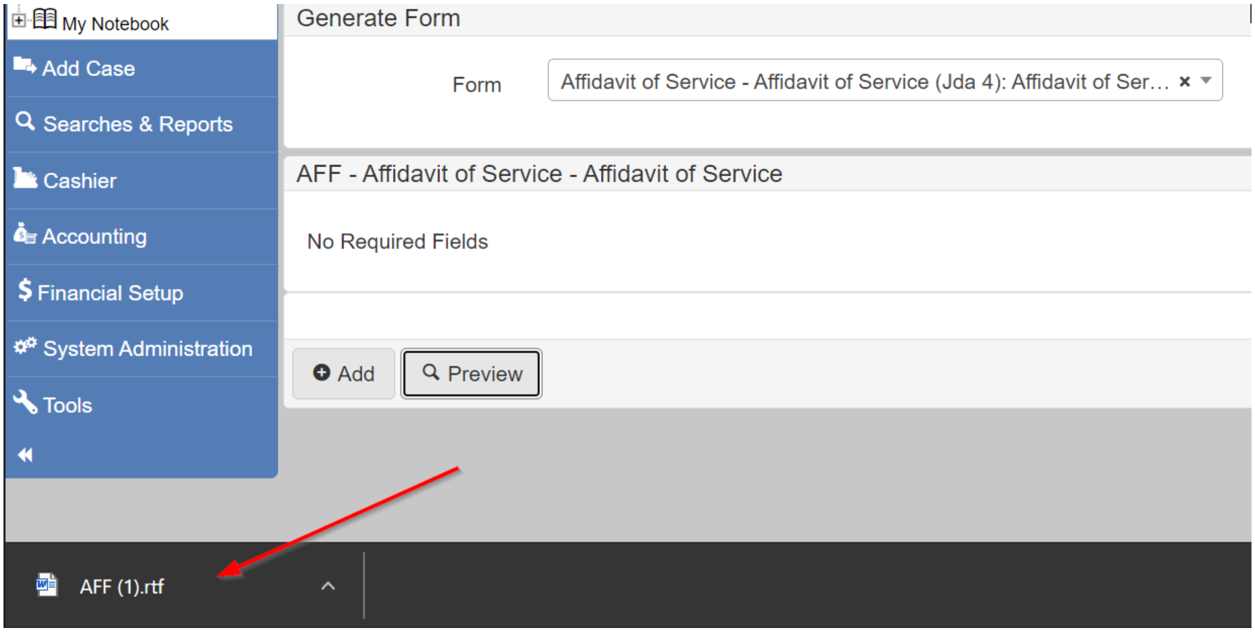
Document Generation allows a user to generate documents from templates. These templates can be standalone without user input, or require input from the user to finish generation.



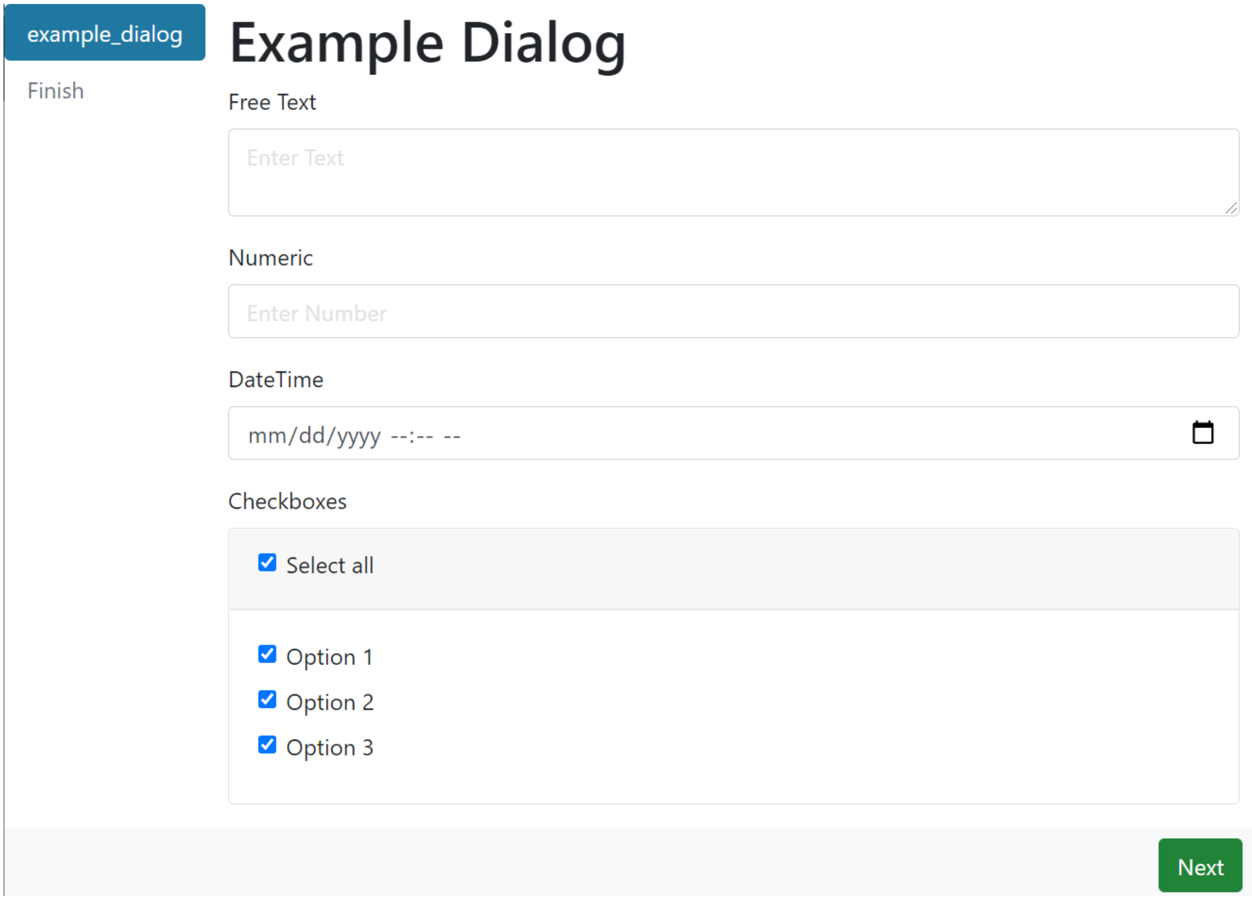
1. **Form**: Select the document you wish to generate from the dropdown.
2. **[Add]**: Add a document to the **Filing Cabinet**.
3. **[Preview]**: Download a document for preview.

When generating a template, you can **[Add]** or **[Preview]** the document.

Click **[Add]** to generate and save the document to the filing cabinet of the current **Case** or entity[Person] record. Click **[Preview]** to generate and download an example file for review before adding it to the **Filing Cabinet**.



If a template requires user input or has dialogs, the user must enter data before the document can be generated.



Once the user finishes entering the required data, the document is available in the **Filing Cabinet**.

If the template requires no input from the user, the template generates and saves the document to the **Filing Cabinet** without further interaction.

Document scanning

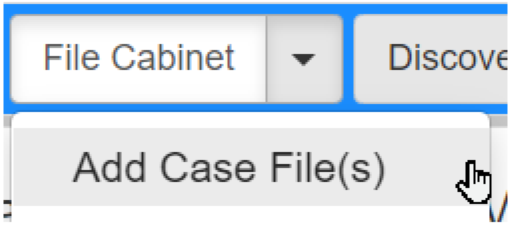
Document scanning allows a user to scan documents to a **Case** or **Person** record.

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:

   > Opening eCourt 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:

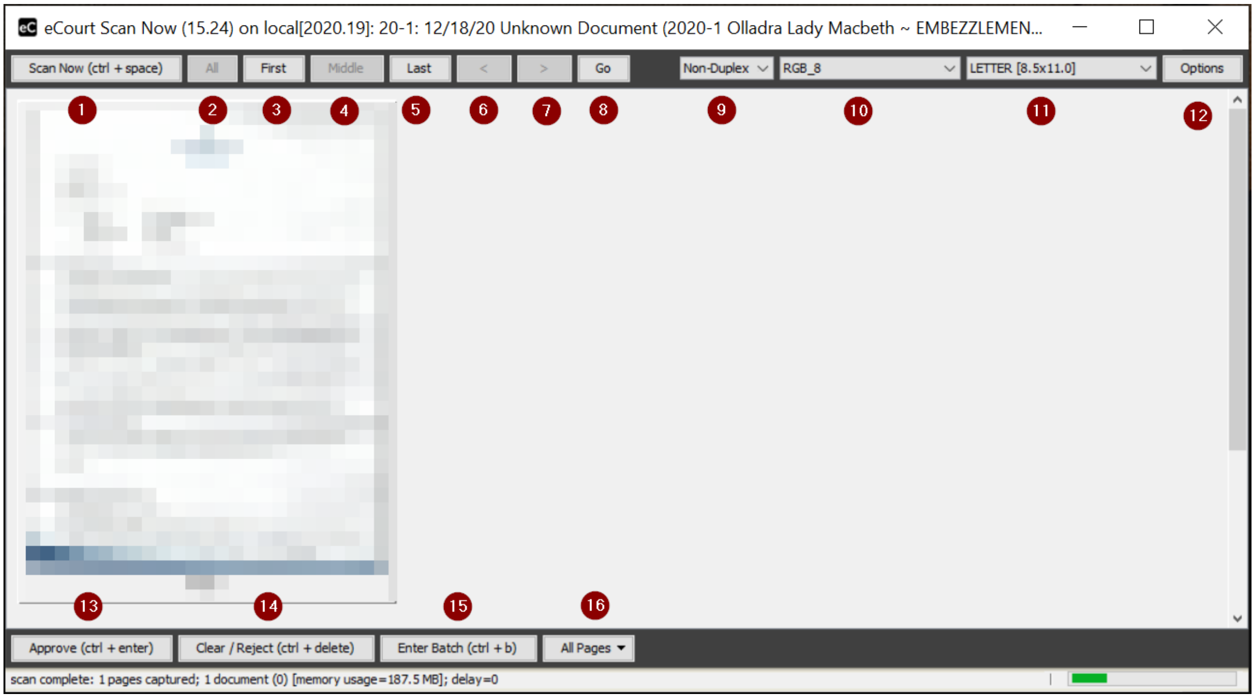
   > Your browser does not support launching a Java application. The scan and print service cannot start automatically. To manually launch the service click here.

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

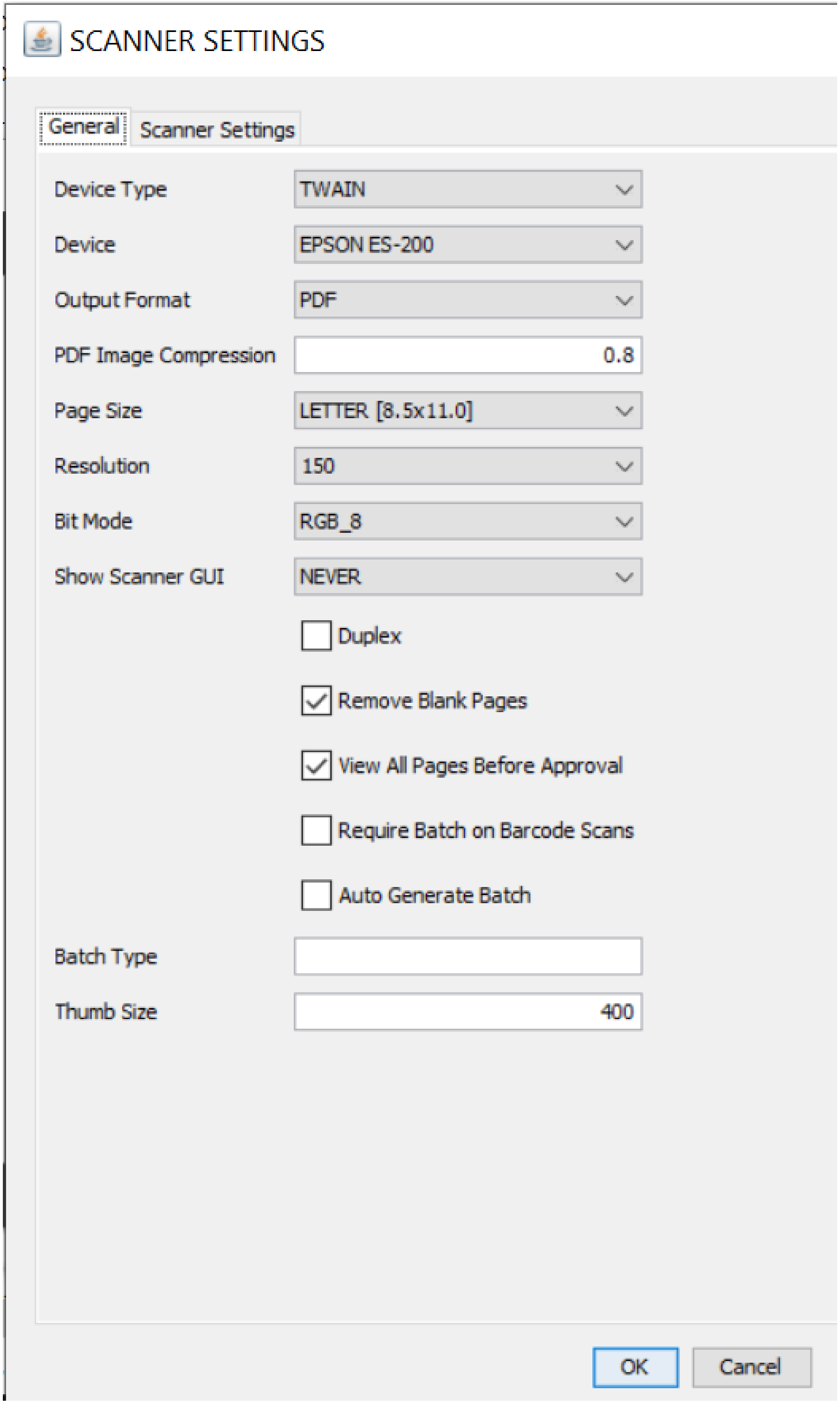
When the Java app is launched, the scan window opens.

> If you have a document already on a feeding scanner, the scanning app may start to scan the document the moment the app opens.

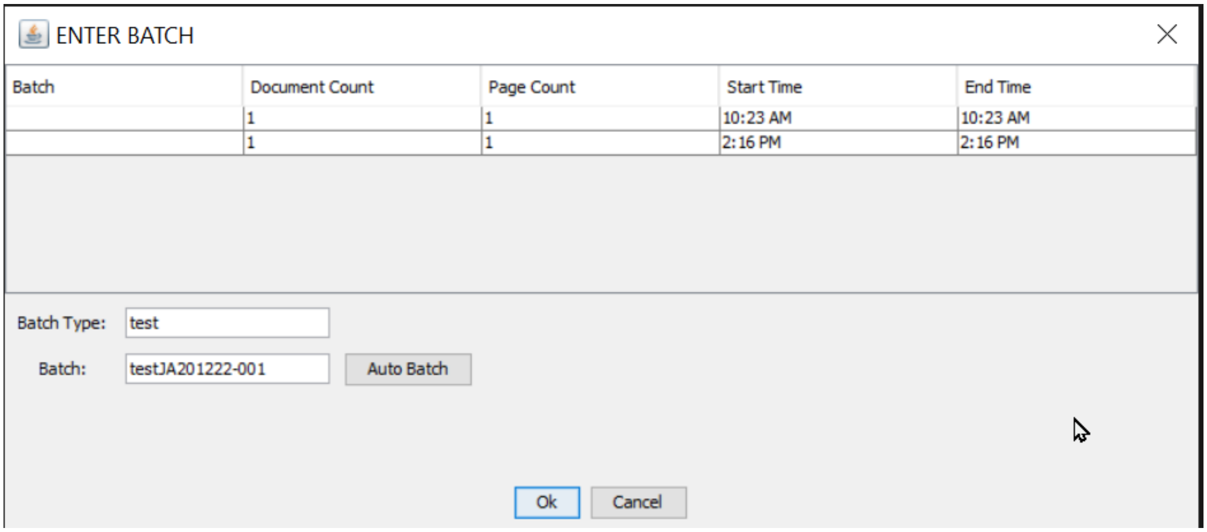
Scanning controls



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.

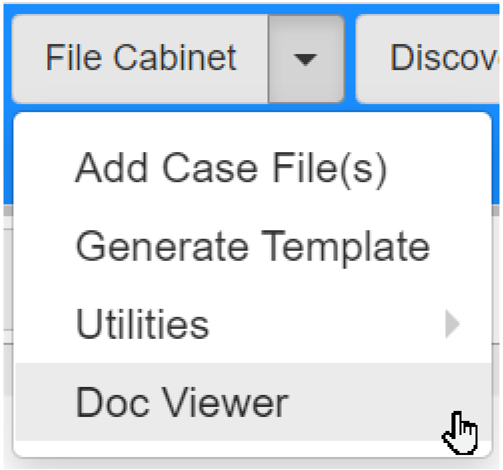


16. **Page Rotation**: Select option to rotate document pages.

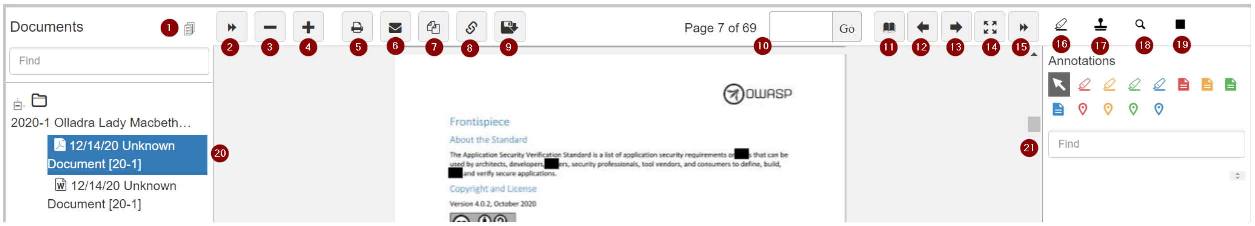
Document viewer

The **Document Viewer** allows you to open, view, and edit contents of a file in your web browser.

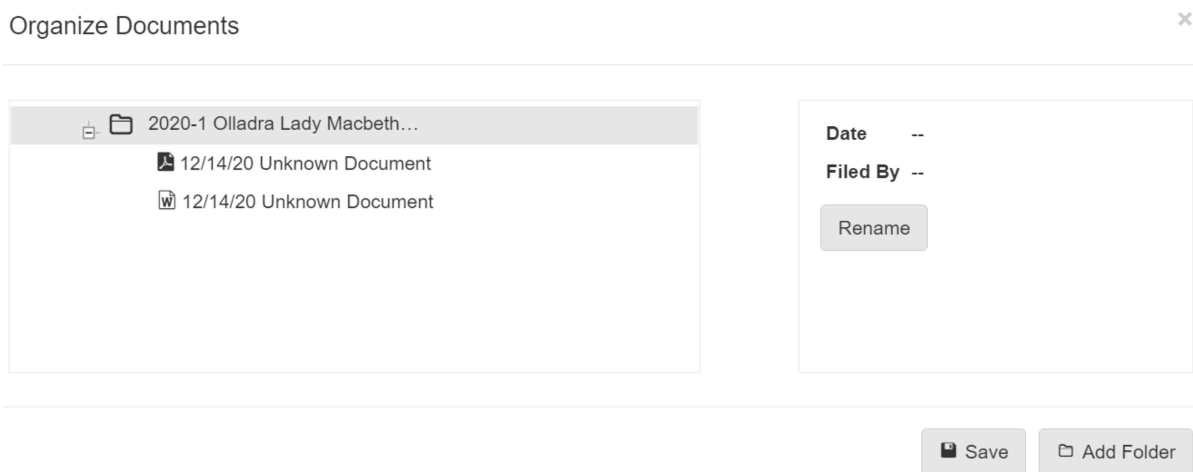
The **Document Viewer** can be accessed from a **Case**/**Person** view by clicking the **File Cabinet** dropdown, then selecting **Doc Viewer**.



Controls

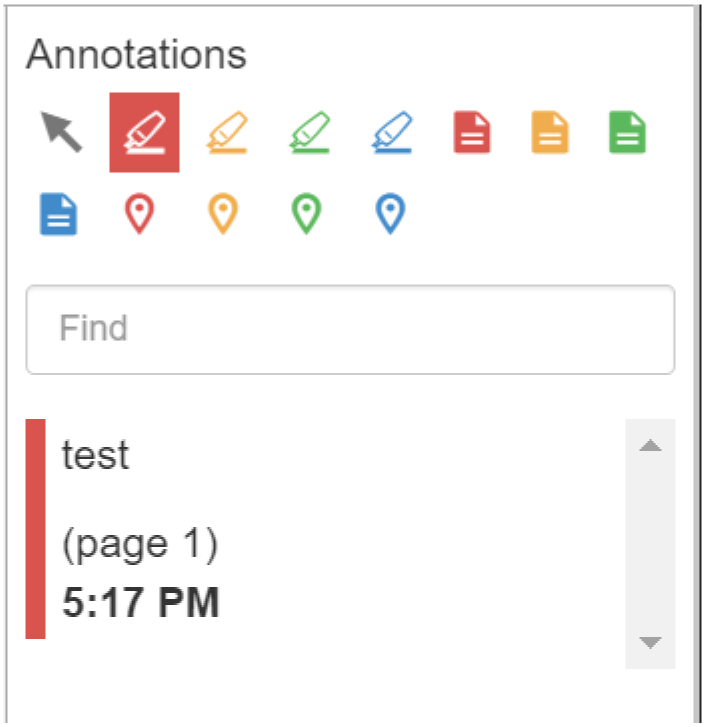


1. The **Stack of Document** icon: Click to organize documents, move files, add/remove/rename directories.



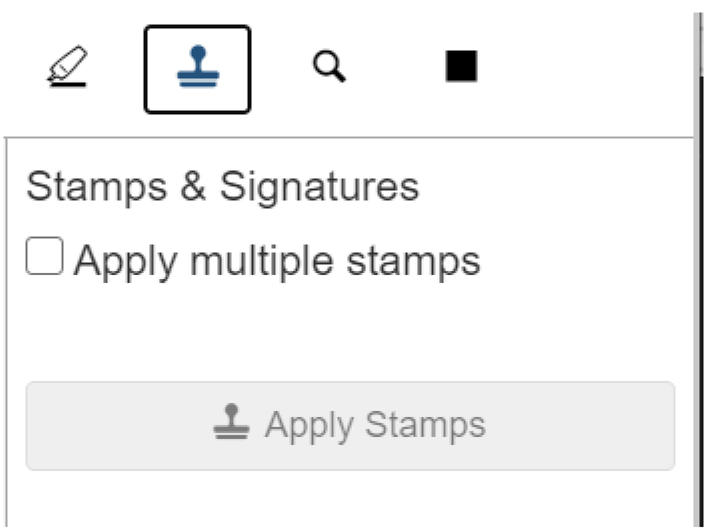
2. The **Double Arrows** icon: click to show or hide the left sidebar in the viewer.
3. The **Minus Sign** icon: click to zoom out/decrease magnification of the document view.
4. The **Plus Sign** icon: click to zoom in/increase magnification of the document view.
5. The **Printer** icon: click to print the document. You can set the number of copies.
6. The **Email** icon: click to email the document in your default email client.
7. The **Copy** icon: click to copy text from the selected area in the document.
8. The **Link** icon: click to copy the document URL.
9. The **Download** icon: click to download the document.
10. The **Page Navigation**: navigate to a page by entering a page number, the click **[Go]**.
11. The **Book/Paper** icon: click to change views between reading view and document view.
12. The **Left Arrow** icon: click to show the previous document page.
13. The **Right Arrow** icon: click to show the next document page.
14. The **Square Expand** icon: click to toggle fullscreen mode.
15. The **Double Arrows** icon: click to show or hide the right sidebar in the viewer.

16. The **Marker** icon: click to show the **Annotations** panel in the right sidebar.

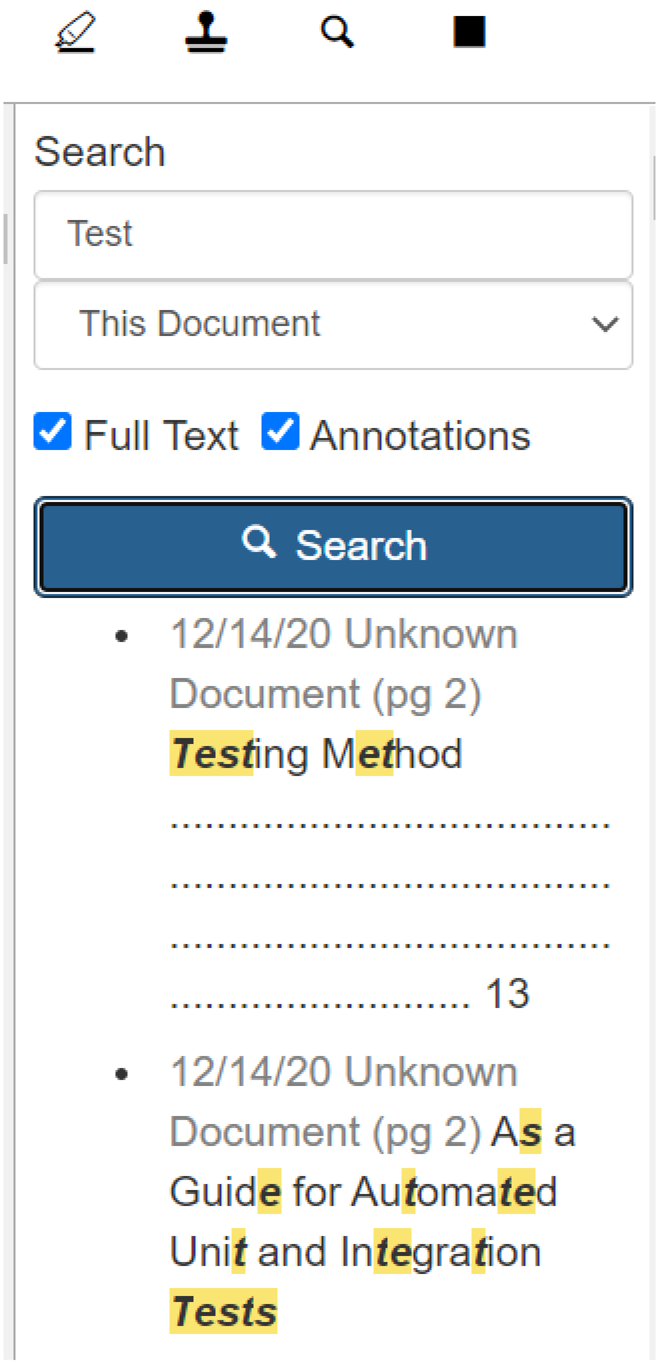


Created annotations can be filtered in the **Find** bar.

17. The **Stamp** icon: click to show the **Stamp** panel in the right sidebar.

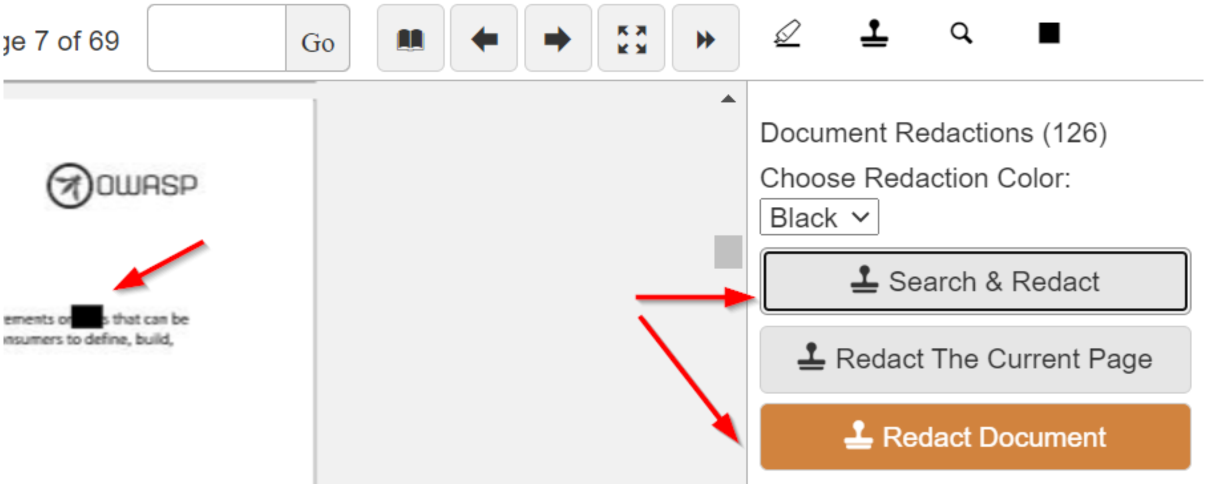


18. The **Magnifying Glass** icon: click to show the **Document Search** panel in the right sidebar.



Search for terms in the full text content of the document and annotations.

19. The **Square** icon: click to show the **Redact** panel in the right sidebar.



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

20. The **Left Sidebar**: The left sidebar shows the documents and folder structure. You can filter documents based on your criteria in the **Find** bar.
21. The **Right Sidebar**: The right sidebar content changes based on the buttons you click: **Annotations**, **Stamps**, **Search**, and **Redact**.

Discovery packets

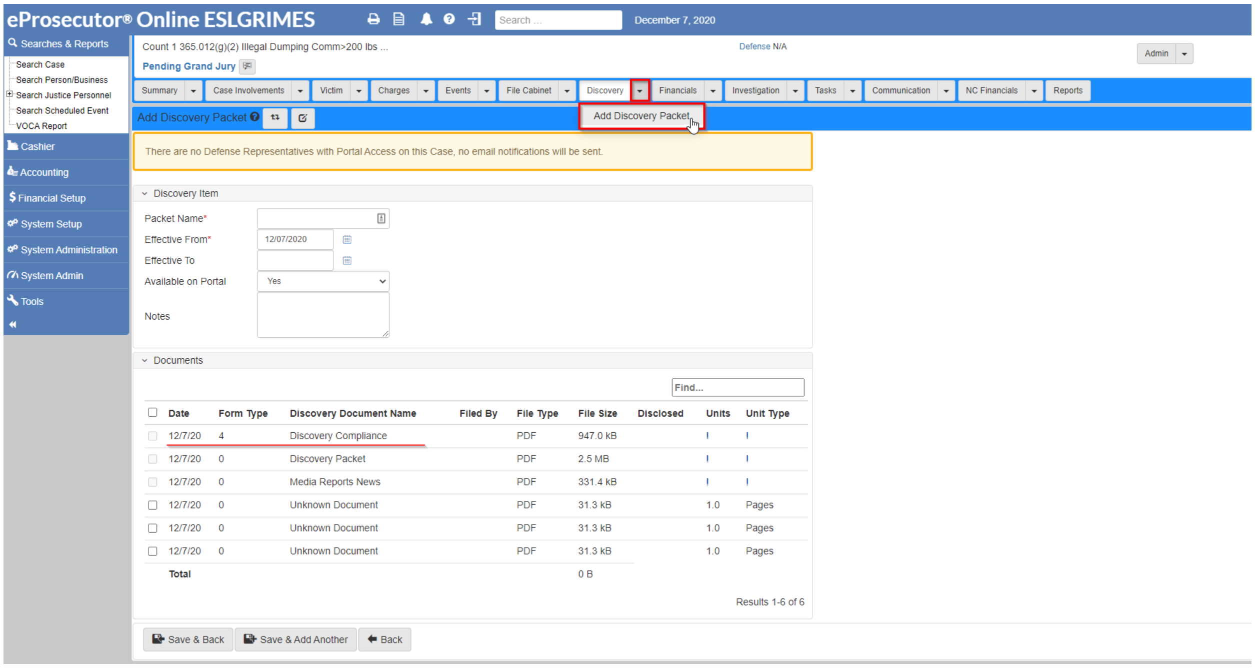
Discovery Packets are Zip files that can be shared between agencies and people. In {product,} **Discovery Packets** are shared using the Portal. The eProsecutor Online system creates invites and sends emails to the end user inviting them to the Portal instance. The invites are validated on the server and all permitted individuals can access **Discovery Packets** on the case level.

In this section

- https://documentation.journaltech.com/eProsecutorOnline/user/discovery_packets/create.html

Create

Create a **Discovery Packet** with the **Case Folder View** by clicking the **Discovery** dropdown, then selecting **Add Discovery Packet**.



For information on case navigation, refer to Cases.

On the **Add Discovery Packet** screen:

- Required fields are marked with a red asterisk.
- An effective to date can be added to limit the time the packet is available. If no time is selected the packet does not expire.
- Documents can then be selected and stored as a Zip file.

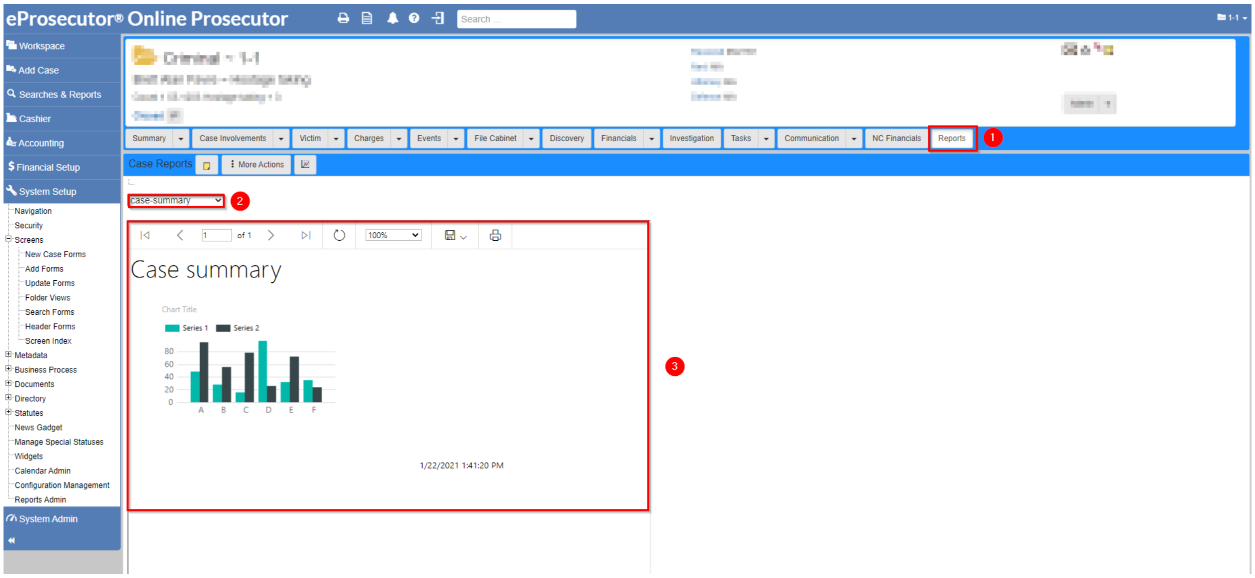
> Documents must be marked as approved for disclosure before a document can be added to a **Discovery Packet**. For information on how to mark a document approved, refer to File cabinet.

Reports

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

- https://documentation.journaltech.com/eProsecutorOnline/user/reports/case.html
- https://documentation.journaltech.com/eProsecutorOnline/user/reports/financial.html
- https://documentation.journaltech.com/eProsecutorOnline/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

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

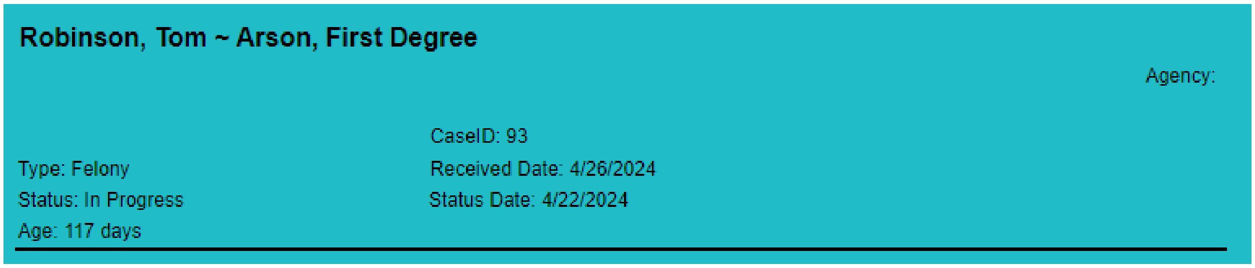
Case involvements

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

Case summary

This report shows a summary of **Case** components including involvements, charges, events, status history, documents, communication, and tasks.

Header



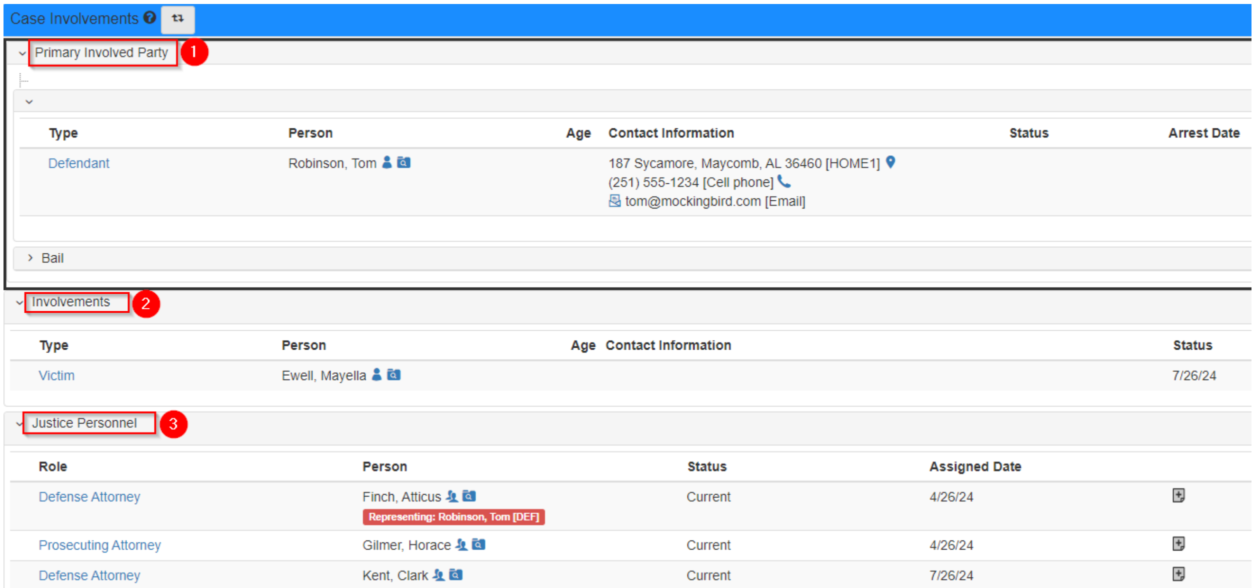
The header of this report shows reference information about the **Case**. Most of the information shows matches values shown in the header of the **Case Folder View**.

Involvements

The **Involvements** section shows the individuals involved in the **Case**. They are separated into the following three groups:

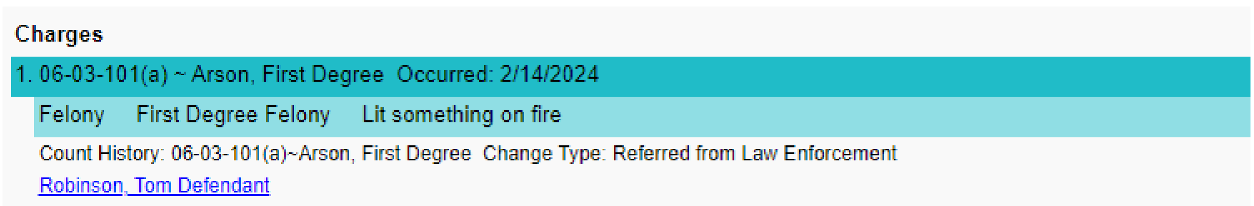
1. **Primary** involvements. A **Person** is considered a primary involvement if their **Case** involvement type has a **Category** of **Primary**.
2. Other involvements.
3. Justice personnel. This includes individuals working in the judicial system.

This structure matches how involvements are shown in the **Case Involvements** tab in the **Case Folder View**.

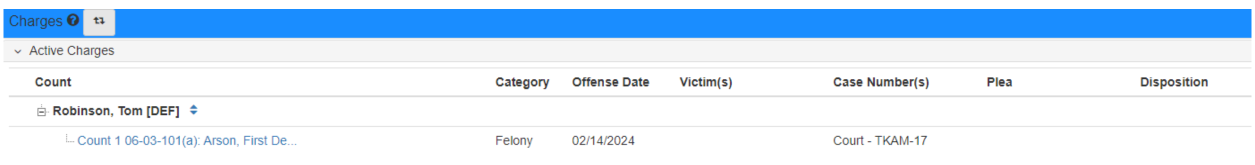


Refer to Case involvements for more information.

Charges

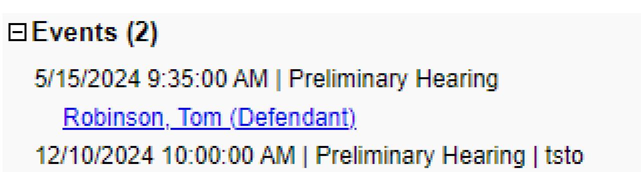


The **Charges** section shows the charges connected to the defendants on the **Case**. Charges are shown in the **Charges** tab in the **Case Folder View**.

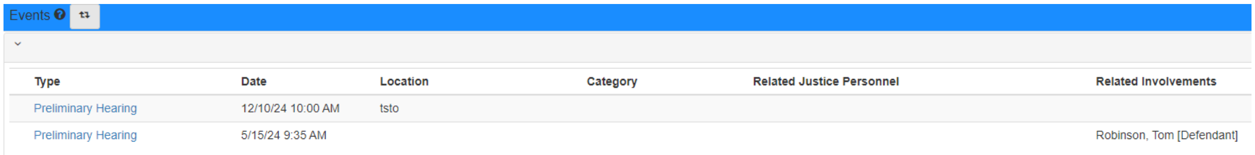


Refer to Charges for more information.

Events

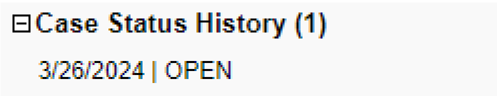


The **Events** section shows the past and future events linked to the **Case**. Events are shown in the **Events** tab in the **Case Folder View**.

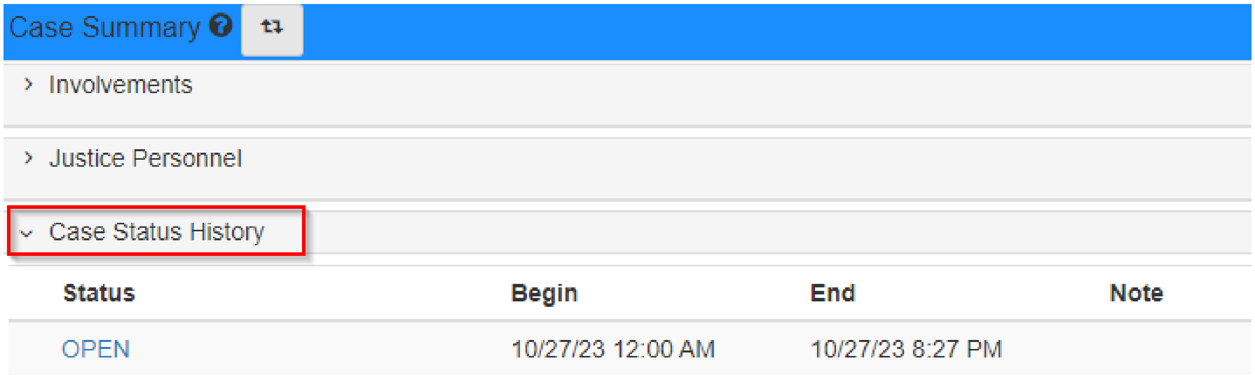


Refer to Events for more information.

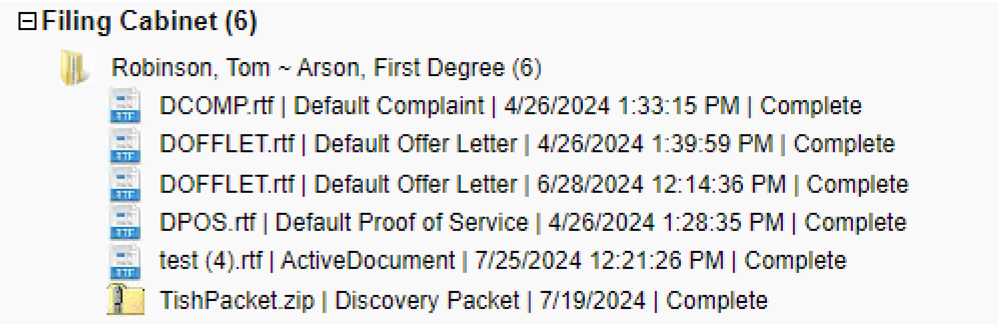
Case status history



The **Case status history** section shows previous statuses assigned to the **Case** and the assigned date for each status. The status history is shown in the **Case Status History** section of the **Summary** tab in the **Case Folder View**.



Filing cabinet



The **Filing cabinet** section shows the documents uploaded to the **Case**. Documents are shown in the **File Cabinet** tab in the **Case Folder View**.

Refer to File cabinet for more information.

Communication

⊟ Communication (2)

7/24/2024 3:38:00 PM |

- Robinson, Tom (Defendant)
- Gilmer, Horace (Prosecuting Attorney) — 4/26/2024 12:00:00 AM
- Notes: testsetsdf

7/24/2024 3:39:00 PM |

- Finch, Atticus (Defense Attorney) — 4/26/2024 12:00:00 AM
- Gilmer, Horace (Prosecuting Attorney) — 4/26/2024 12:00:00 AM

The **Communication** section shows documented communication between justice personnel and involvements. Communications are shown in the **Communication** tab in the **Case Folder View**.

Communication

Type	Date	Related Justice Personnel	Related Involvements
Email	7/24/24 3:38 PM	Horace Gilmer	Tom Robinson
Call	7/24/24 3:39 PM	Horace Gilmer / Atticus Finch	

Refer to Communication for more information.

Tasks

⊟ Tasks (1)

9/19/2024 | | New

Notes: Collect evidence and interview witnesses.

The **tasks** section shows tasks linked to the **Case**. Tasks are shown in the **Tasks** tab in the **Case Folder View**.

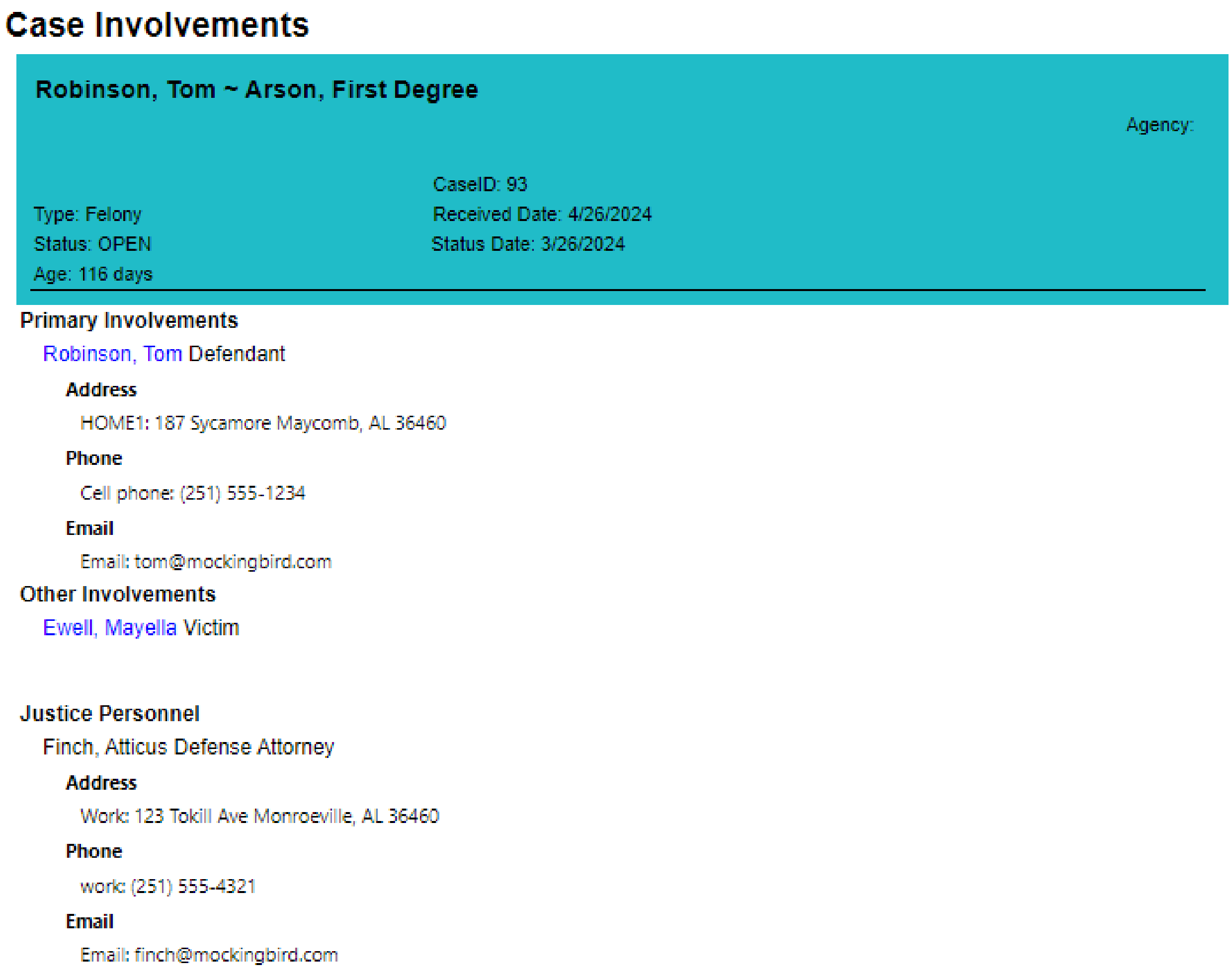
Tasks

Type	Instructions	Due Date	Status	Assigned To	Complete
Case Task	Collect evidence and interview witnesses.	09/19/2024	New	Horace Gilmer	

Refer to Tasks for more information.

Case involvements

This report shows a list of involvements and justice personnel on a **Case** and their contact information.


Case Involvements

Robinson, Tom ~ Arson, First Degree

Agency:

Type: Felony
Status: OPEN
Age: 116 days

CaseID: 93
Received Date: 4/26/2024
Status Date: 3/26/2024

Primary Involvements

Robinson, Tom Defendant

Address

HOME1: 187 Sycamore Maycomb, AL 36460

Phone

Cell phone: (251) 555-1234

Email

Email: tom@mockingbird.com

Other Involvements

Ewell, Mayella Victim

Justice Personnel

Finch, Atticus Defense Attorney

Address

Work: 123 Tokill Ave Monroeville, AL 36460

Phone

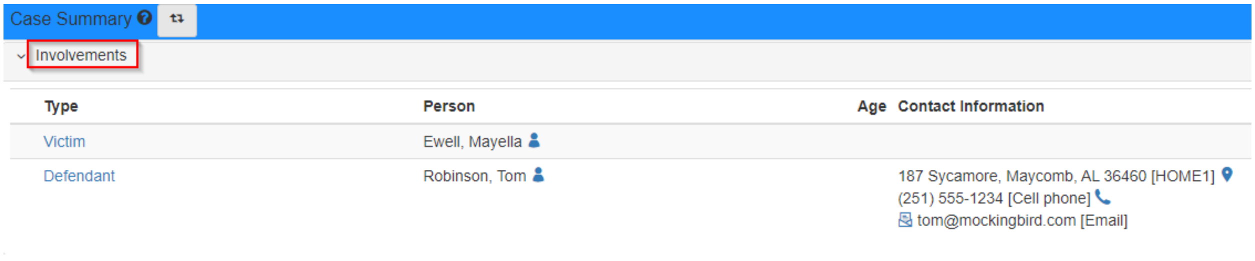
work: (251) 555-4321

Email

Email: finch@mockingbird.com

Involvements

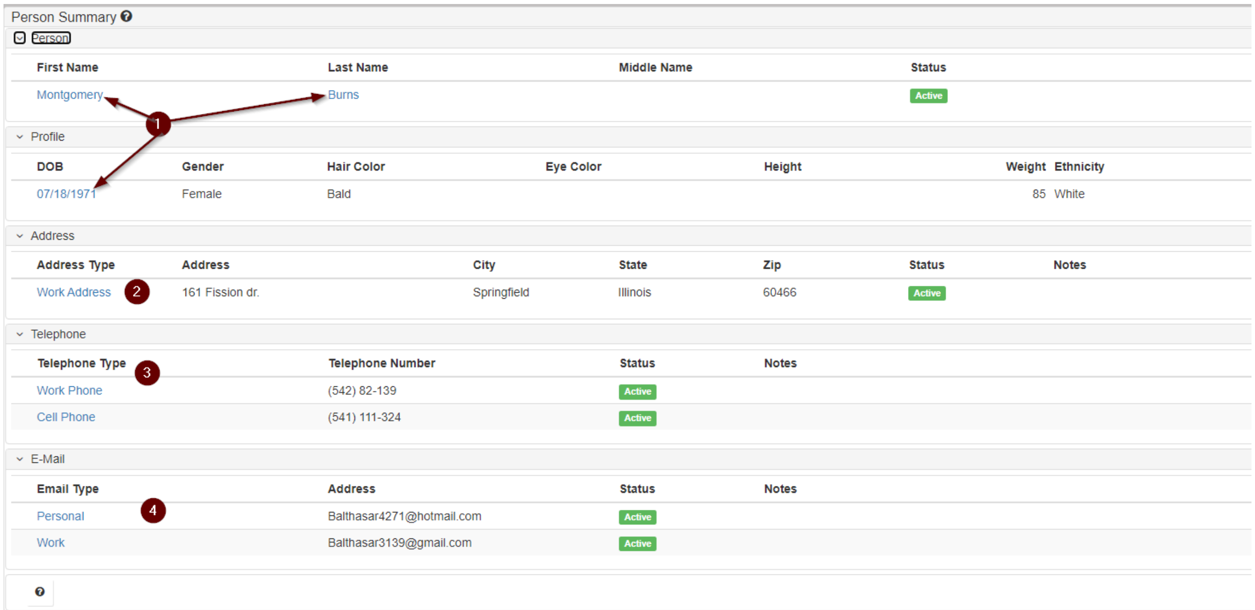
Involvements are **Persons** linked to a **Case**. They show in the **Involvements** section of the **Summary** tab in the **Case Folder View**.


Case Summary

Involvements

Type	Person	Age	Contact Information
Victim	Ewell, Mayella		
Defendant	Robinson, Tom		187 Sycamore, Maycomb, AL 36460 [HOME1] (251) 555-1234 [Cell phone] tom@mockingbird.com [Email]

Click the icon to show the **Person Summary Folder View**. This view shows the Name, address, telephone, and email of the selected **Person**.

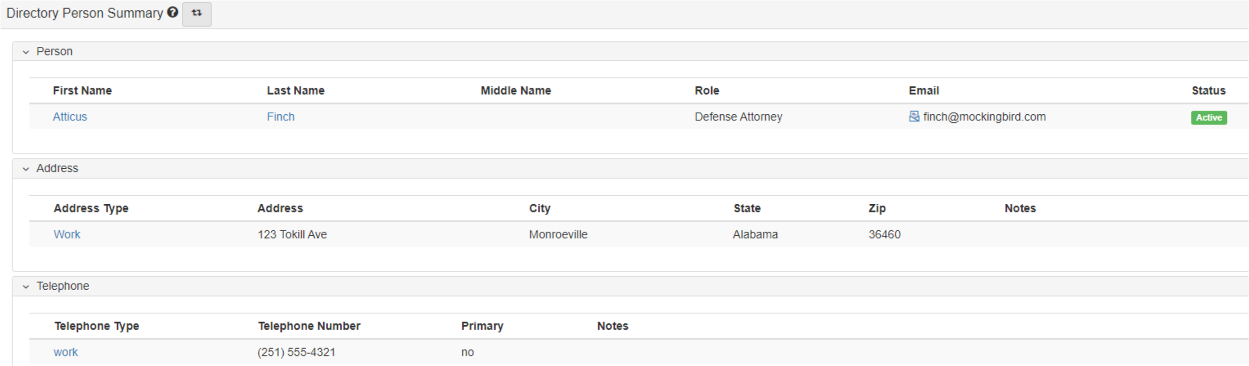


Refer to Person for more information.

Justice personnel

Justice personnel are **Directory Persons** assigned to a **Case**. They show in the **Justice Personnel** section of the **Summary** tab in the **Case Folder View**.

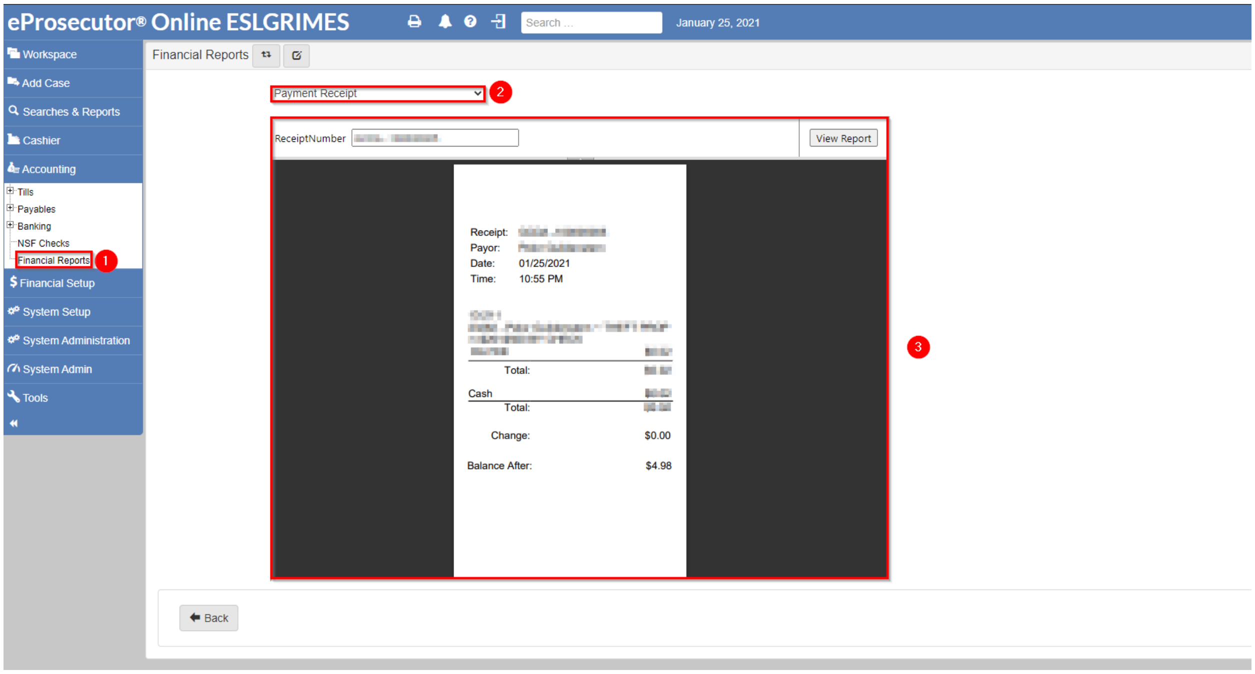
Click the icon to show the **Directory Person Summary Folder View**. This view shows the name, address, telephone, and email of the selected **Directory Person**.



Refer to Directory person for more 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.

Accounts payable

This report shows a list of individuals who are owed money. An individual is considered owed money when:

- The amount they paid on a fee is greater than the amount owed.
- They are the payee of a restitution [https://documentation.journaltech.com/eProsecutorOnline/user/financials/restitution.html] payment which does not have an associated voucher [https://documentation.journaltech.com/eProsecutorOnline/user/financials/vouchers.html].

This report includes expandable details which show each case along with the associated fee or restitution amount for each outstanding balance.

Accounts Payable

Payee	Balance
Shalash, Ash	⊟ $2,550.00

Date	Case Number	Case	Type	Amount	Paid	Balance
2/27/2023	23-59	Shalash, Ash ~ Malicious Destruction Property $250 To $5000	RESTITUTION	$2,550.00	$0.00	$2,550.00

Accounts receivable

This report shows a list of individuals with outstanding balances. An individual is considered to owe money when:

- They are identified as the party on a fee and the amount paid is less than the amount owed.
- They are the payor of a restitution [https://documentation.journaltech.com/eProsecutorOnline/user/financials/restitution.html] with an outstanding balance.

For individual cases, these can be found in the Financials [https://documentation.journaltech.com/eProsecutorOnline/user/cases/financials.html] tab in the **Case Folder View**.

This report includes expandable details which show each case along with the associated fee or restitution amount for each outstanding balance.

Accounts Receivable

Payor	Balance
⊞[illegible]	$200.00
⊟Robinson, Tom	$766.00

Date	Case Number	Case	Type	Amount	Paid	Balance
7/26/2024	24-33	Robinson, Tom ~ Arson, First Degree	RESTITUTION	$766.00		$766.00

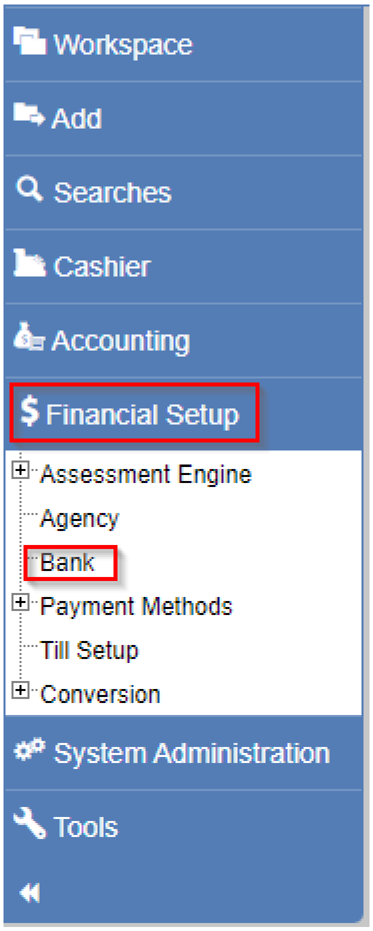
Payor	Balance
⊞[illegible]	$50.00

Voucher receipts

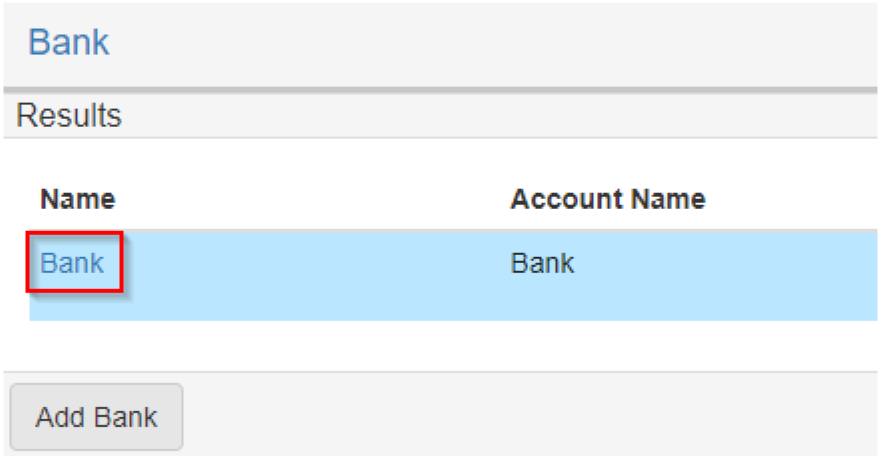
This is a check writing [https://documentation.journaltech.com/eProsecutorOnline/user/financials/check_writing.html] report you can use to print vouchers [https://documentation.journaltech.com/eProsecutorOnline/user/financials/vouchers.html]. For more information about creating disbursement vouchers, refer to the **Disbursing restitution** section of the Restitution page.

To select this report for check printing:

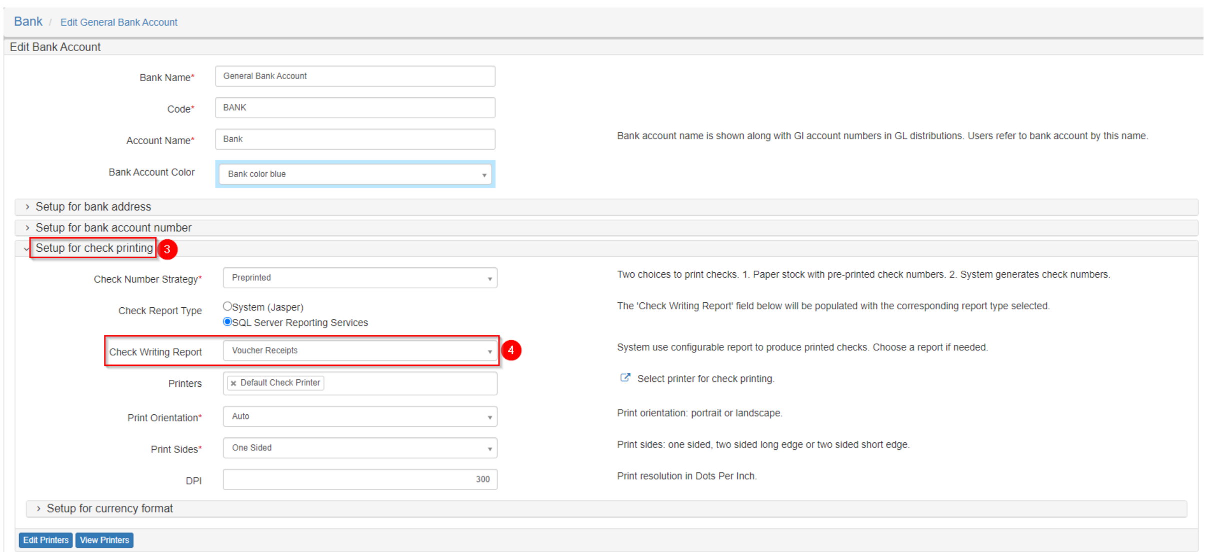
1. Navigate to **Left navigation** › **Financial Setup** › **Bank**.



2. Click a bank name to open the **Edit Bank Account form**.



3. Click the **Setup for check printing** section to expand it.
4. Click the **Check Writing Report** dropdown, then select **Voucher Receipts**.



Report breakdown

The report includes identical summary sections at the top and bottom of the page with the check information in the middle.

The Attached Check for $200.00 is Paid to Mayella Ewell

Name	Case	Init Bal..	Curr Bal..	Net Pay..
Robinson, Tom	24-33	$766.00	$566.00	$200.00

Two Hundred Dollars 0 Cents

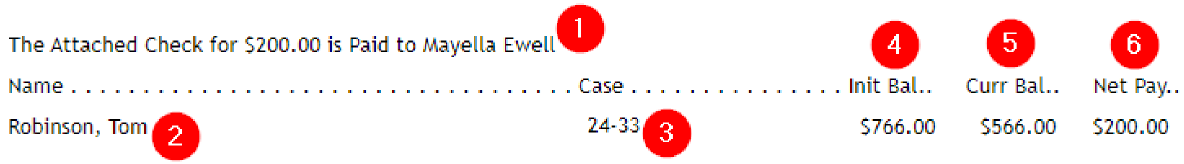
08-05-2024 $200.00

Mayella Ewell
123 Ewell Drive
Monroeville , AL 36460

The Attached Check for $200.00 is Paid to Mayella Ewell

Name	Case	Init Bal..	Curr Bal..	Net Pay..
Robinson, Tom	24-33	$766.00	$566.00	$200.00

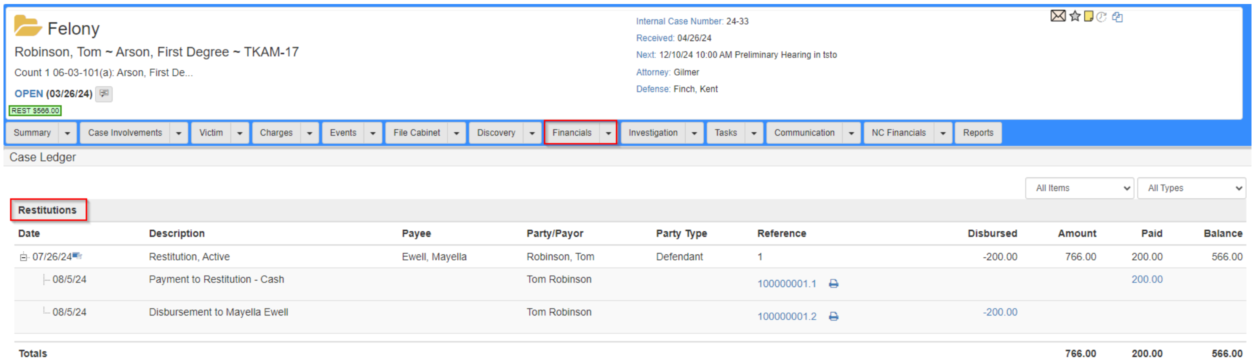
Summary



The summary section includes:

1. The payee and amount of the attached check.
2. The payor name.
3. The case number.
4. The sum of all restitution amounts on the case.
5. The total unpaid balance of all restitutions on the case.
6. The sum of all payments made on all restitutions on the case.

This restitution information can be found in the **Restitutions** section of the **Case Ledger Folder View** in the **Financials** tab for a case.



Check details

The check section includes:

1. The dollar line, where the check amount is presented long-form with words instead of numbers.
2. The printed date of the check.
3. The dollar amount box where the check amount is presented in numerals.
4. The payee name and address.

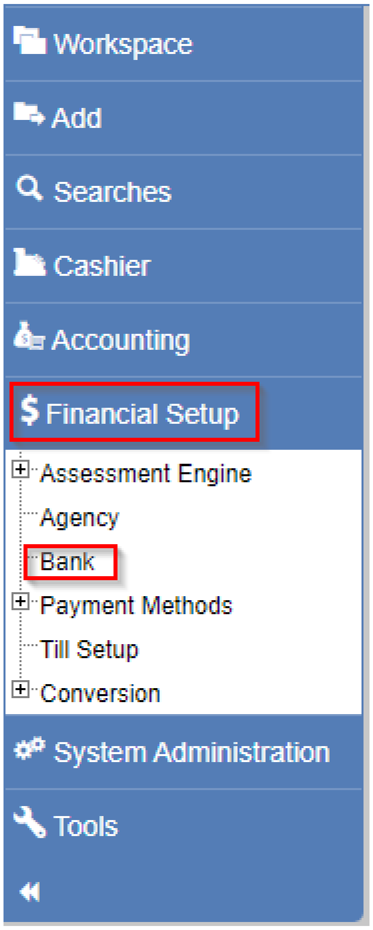
Voucher receipts by restitution

This is a check writing [https://documentation.journaltech.com/eProsecutorOnline/user/financials/check_writing.html] report you can use to print vouchers [https://documentation.journaltech.com/

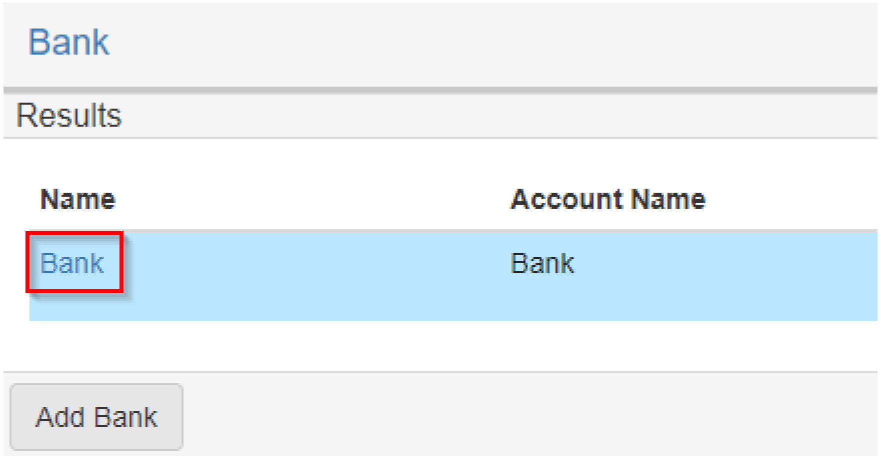
eProsecutorOnline/user/financials/vouchers.html]. For more information about creating disbursement vouchers, refer to the **Disbusring restitution** section of the Restitution page.

To select this report for check printing:

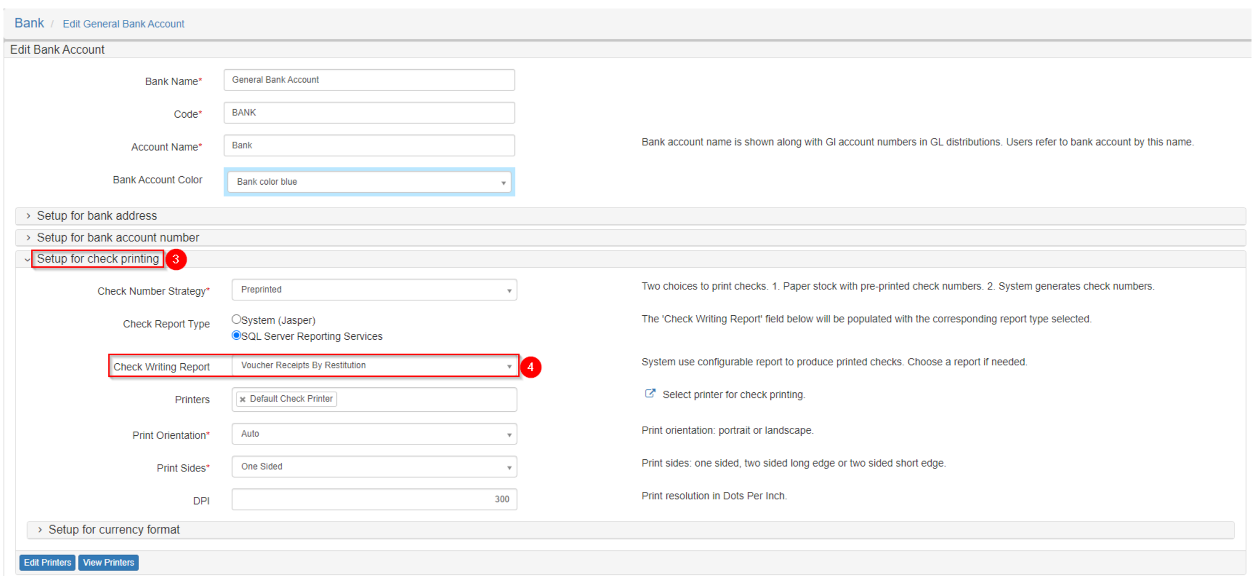
1. Navigate to **Left navigation › Financial Setup › Bank**.



2. Click a bank name to open the **Edit Bank Account form**.



3. Click the **Setup for check printing** section to expand it.
4. Click the **Check Writing Report** dropdown, then select **Voucher Receipts by Restitution**.



Report breakdown

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The Attached Check for $200.00 is Paid to Mayella Ewell

Name	Case	Init Bal..	Curr Bal..	Net Pay..
Robinson, Tom	24-33	$766.00	$566.00	$200.00

Two Hundred Dollars 0 Cents

08-05-2024 $200.00

Mayella Ewell
123 Ewell Drive
Monroeville , AL 36460

The Attached Check for $200.00 is Paid to Mayella Ewell

Name	Case	Init Bal..	Curr Bal..	Net Pay..
Robinson, Tom	24-33	$766.00	$566.00	$200.00

Summary

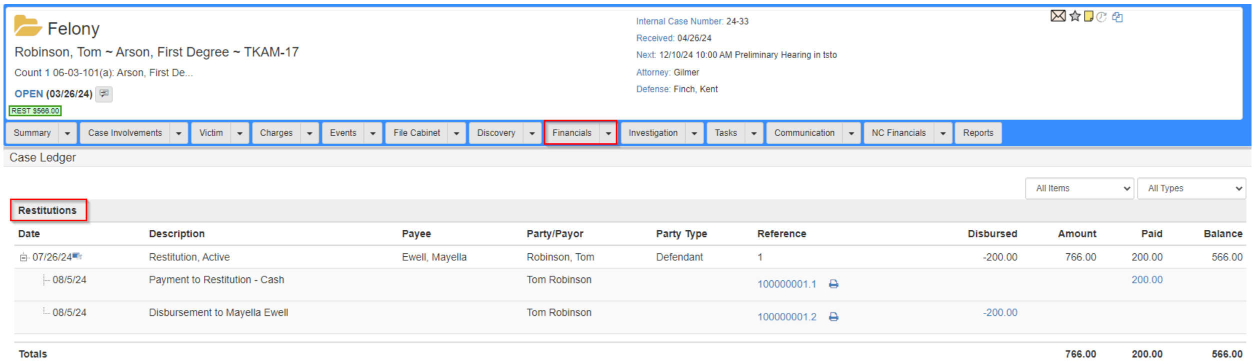
The Attached Check for $200.00 is Paid to Mayella Ewell 1

		4	5	6
Name	Case	Init Bal..	Curr Bal..	Net Pay..
Robinson, Tom 2	24-33 3	$766.00	$566.00	$200.00

The summary section includes:

1. The payee and amount of the attached check.
2. The payor name.
3. The case number.
4. The restitution amount.
5. The unpaid balance of the restitution.
6. The sum of all payments made on the restitution.

This restitution information can be found in the **Restitutions** section of the **Case Ledger Folder View** in the **Financials** tab for a case.



Check details

The check section includes:

1. The dollar line, where the check amount is presented long-form with words instead of numbers.
2. The printed date of the check.
3. The dollar amount box where the check amount is presented in numerals.
4. The payee name and address.

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.

Default reports

- https://documentation.journaltech.com/eProsecutorOnline/user/reports/person_financials.html: Shows a list of amounts owed from and to a **Person**.
- https://documentation.journaltech.com/eProsecutorOnline/user/reports/person_summary.html: Shows a summary of **Person** information including contact information, relationships, future events and **Case** involvements.

Person financials

This report provides a list of receivables and payables for the selected **Person**.

Receivable

The receivable section shows:

1. A sum of all amounts owed by the **Person**.
2. A list of **Cases** on which the **Person** has an outstanding balance.

Tom Robinson owes $6,866.00 1

Date	Case Number	Case Name	Type	Amount	Paid	Balance
2 7/26/2024	24-33	Robinson, Tom ~ Arson, First Degree	RESTITUTION	$766.00	$200.00	$566.00
6/7/2024	24-175	Robinson, Tom ~ Aggravated Burglary	RESTITUTION	$6,300.00		$6,300.00

An individual is considered to owe money when:

- They are identified as the party on a fee and the amount paid is less than the amount owed.
- They are the payor of a restitution [https://documentation.journaltech.com/eProsecutorOnline/user/financials/restitution.html] with an outstanding balance.

For individual **Cases**, these can be found in the Financials [https://documentation.journaltech.com/eProsecutorOnline/user/cases/financials.html] tab in the **Case Folder View**.

Payable

The payable section shows:

1. A sum of all amounts owed to the **Person**.
2. A list of **Cases** on which there is an outstanding balance owed to the **Person**.

John Doe is owed $1,300.00 1

Date	Case Number	Case Name	Type	Amount	Paid	Balance
2 7/2024	24-175	Robinson, Tom ~ Aggravated Burglary	RESTITUTION	$1,300.00	$0.00	$1,300.00

An individual is considered owed money when:

- The amount they paid on a fee is greater than the amount owed.
- They are the payee of a restitution [https://documentation.journaltech.com/eProsecutorOnline/user/financials/restitution.html] payment which does not have an associated voucher [https://documentation.journaltech.com/eProsecutorOnline/user/financials/vouchers.html].

For individual **Cases**, these can be found in the Financials [https://documentation.journaltech.com/eProsecutorOnline/user/cases/financials.html] tab in the **Case Folder View**.

Person summary

This report shows a summary of **Person** information including profile, address, telephone, email, identification, attributes, notes, relationships, financials, future events, and case involvements.

Profile

Person Summary

Bilbo Baggins

DOB: 9/22/1937 | Age: 86 | Ethnicity: Other | Gender: Male | Eye Color: Brown | Hair Color: Brown | Height: 4'1" | Weight (lbs): 110

The **Profile** section shows personal attributes for the **Person**, including their name, date of birth, age, ethnicity, gender, hair and eye color, height, and weight.

This information shows in the **Profile** section of the **Summary** tab in the **Person Folder View**:

Person Summary

Person

First Name	Last Name	Middle Name	Status
Bilbo	Baggins		Active

Profile

DOB	Gender	Hair Color	Eye Color	Height	Weight	Ethnicity
09/22/1937	Male	Brown	Brown	4'1"	110	Other

Address

⊟ **Address**

HOME1: 14 Bag End Chicago, IL 60612 | Active

The **Address** section shows one or more **Addresses** for a **Person**. Each **Address** includes the type, address, and status.

The **Addresses** show in the **Address** section of the **Summary** tab in the **Person Folder View**:

Address

Address Type	Address	City	State	Zip	Status	Note
HOME1	14 Bag End	Chicago	Illinois	60612	Active	

Telephone

⊟ **Telephone**

Cell phone: (773) 224-4467 | Active

Cell phone: (555) 555-4321 | Inactive

The **Telephone** section shows one or more **Telephone** numbers for a **Person**. Each **Telephone** includes the type, number, and status.

The **Telephones** show in the **Telephone** section of the **Summary** tab in the **Person Folder**

View:

⌄ Telephone

Telephone Type	Telephone Number	Status	Note
Cell phone	(773) 224-4467	Active	
Cell phone	(555) 555-4321	Inactive	

Email

⊟ **Email**

Email: bilbo@shire.com | Active

The **Email** section shows one or more **Email** addresses for a **Person**. Each **Email** includes the type, address, and status.

The **Emails** show in the **E-mail** section of the **Summary** tab in the **Person Folder View**:

⌄ E-Mail

Email Type	Address	Status	Note
Email	bilbo@shire.com	Active	

Identification

⊟ **Identification**

SSN: 282-24-4467 |

Drivers License: B452-6224-4467 | Issuer State: IL | Active

The **Identification** section shows one or more **Identifications** for a **Person**. Each **Identification** includes the type, number, and known effective dates.

The **Identifications** show in the **Identification** section of the **Summary** tab in the **Person Folder View**:

⌄ Identification

Identification Type	Identification Number	Effective To	Note
Drivers License (Illinois)	B452-6224-4467		
SSN	282-24-4467		

Attributes

⊟ **Attributes**

Flight Risk

The **Attributes** section shows one or more **Attributes** assigned to a **Person**.

The **Attributes** show in the **Person Attribute** section of the **Summary** tab in the **Person**

Folder View:

Person Attribute

Attribute	Category	Date	Value	Note
Flight Risk				

Notes

Notes

9/9/2024 - Bilbo is known to disappear.

The **Notes** section shows the **Notes** for the **Person**.

The **Notes** show in the **Person Notes** section of the **Summary** tab in the **Person Folder View**:

Person Notes

Date Taken	Type	Taken By	Note
09/09/2024			Bilbo is known to disappear.

Relationships

Relationships

Son: Frodo Baggins

The **Relationships** section shows the **Relationships** for a **Person**.

Relationships show in the **Relationships** tab in the **Person Folder View**:

Relationships

Type	Related Person	Notes
Son	Baggins, Frodo	

Financials

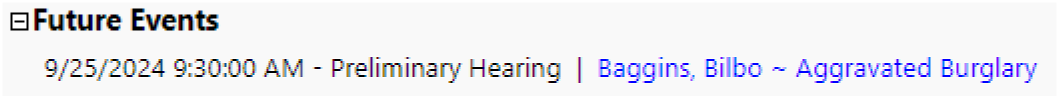
Financials

Bilbo Baggins owes $120,000
Bilbo Baggins is owed $550

The **Financials** section shows the sum of the amounts owed to and from a **Person**.

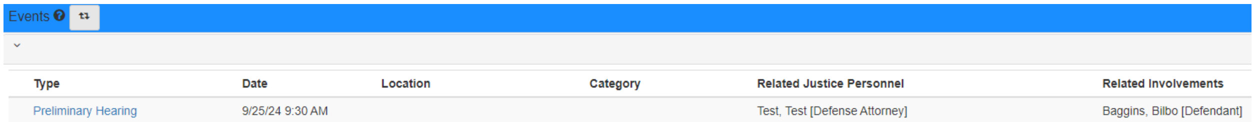
The sums show in the **Financials** tab in the **Person Folder View**:

Future events



The **Future Events** section shows the future events linked to the **Person**.

Events show in the **Events** tab in the **Case Folder View**:

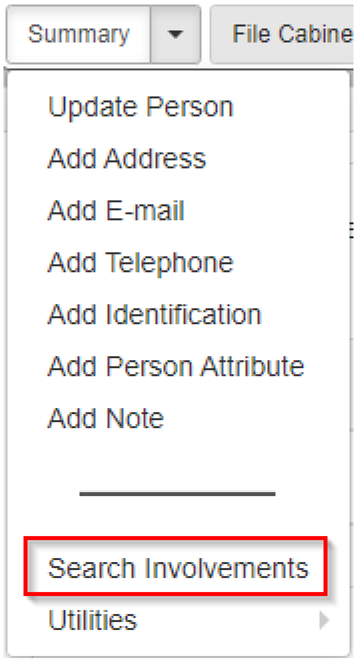


Case involvements

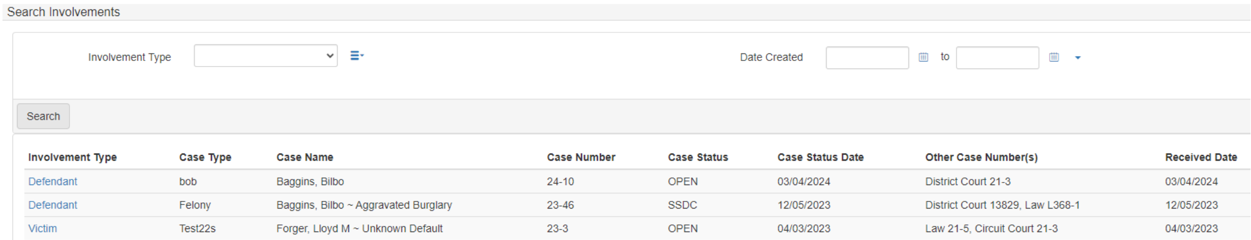
The **Case Involvements** section shows the **Cases** in which the **Person** is involved.

To search involvements for a **Person**:

1. Navigate to a **Person**
2. In the **Summary** dropdown, select **Search Involvements**.



3. Optional: in the **Involvement Type** dropdown, select the desired type.
4. Optional: in the **Date Created** fields, enter a date range.
5. Click **[Search]**

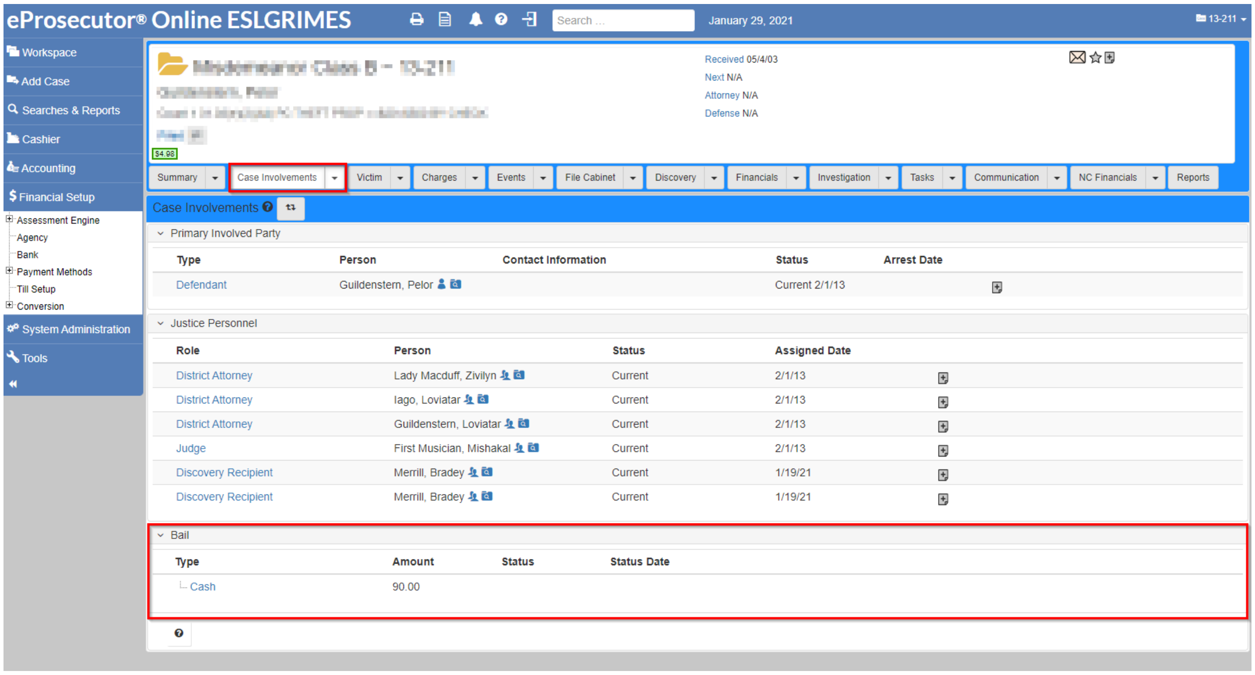


Financials

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

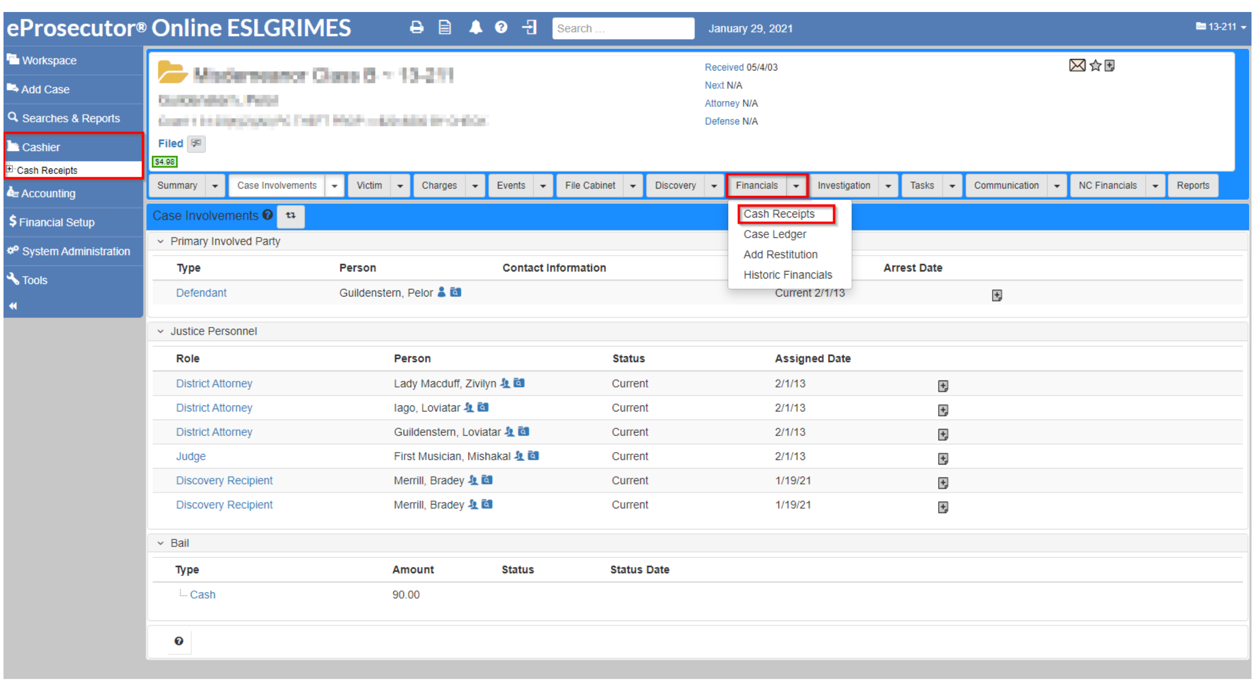
Bail can be found in the **Case Folder View** under the **Case Involvements** tab:



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

Cash receipts

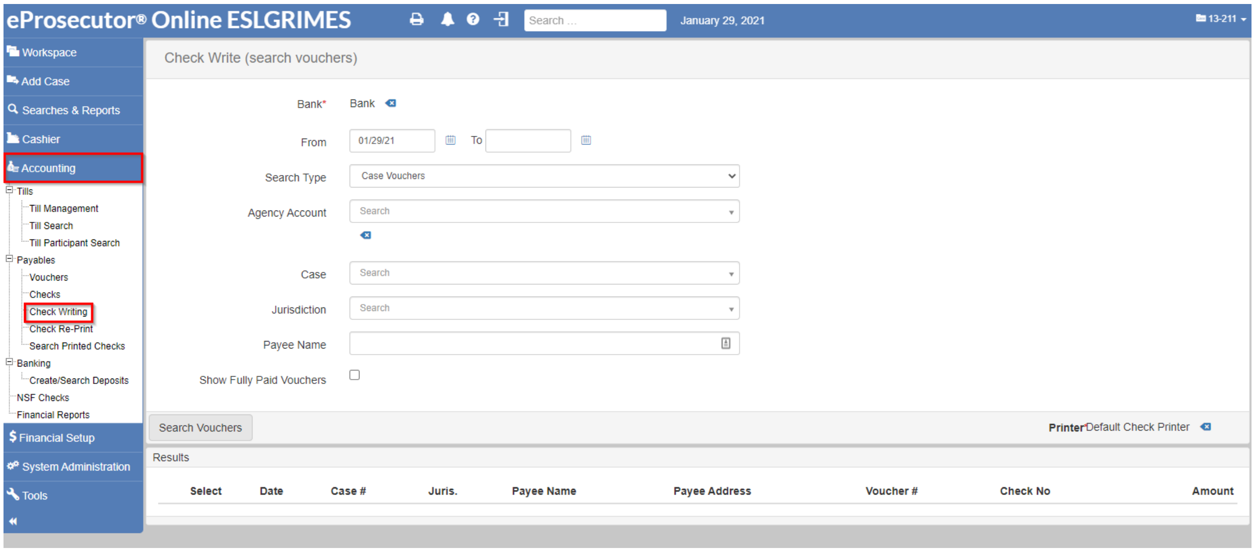
Use the **Cash Receipts** screen to pay invoices and transfer money. **Cash Receipts** can be found in the **Case Folder View** in **Left navigation › Financials › Cash Receipts** or **Left navigation › Accounting › Cash Receipts.**



For information on opening a till, switching till modes, adding fees, and taking payments, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/cash_receipts.html.

Check writing

Once there is money that is ready to be vouchered out of the system, you can 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. Navigate to **Left navigation › Accounting › Payables › Check Writing**:



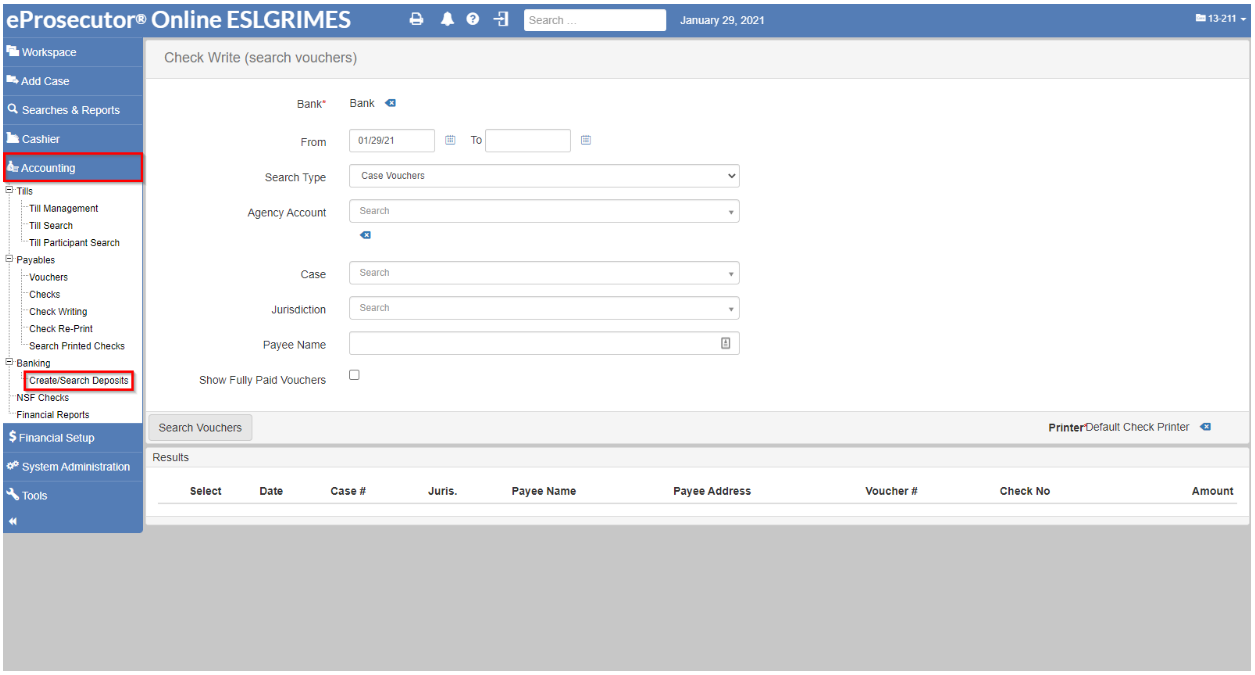
For information on check writing, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/check_writing.html.

Create invoices

Invoices are created when fees are added from the **Cash Receipts** screen.

Deposits

Deposits are used to record money taken to the bank. Navigate to **Left navigation › Accounting › Banking › Create/Search Deposits**:



For information on creating, searching, and editing deposits, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/deposits.html.

Payment plans

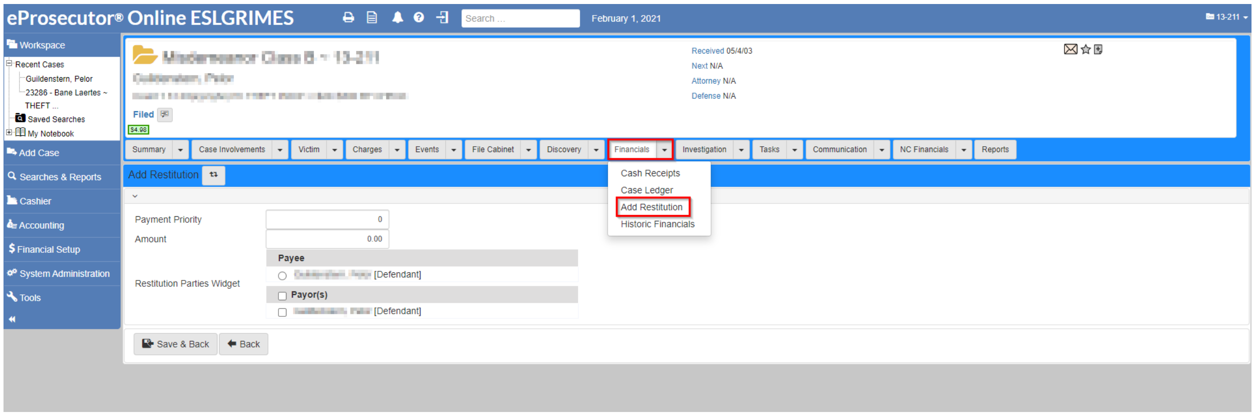
Payment plans allow the payor to make small payments towards the obligations over an extended period of time. For information on pay plans, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/pay_plans.html.

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, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/pay_plans.html.

Restitution

Restitutions can be added to a case under **Financials › Add Restitution** in a **Case Folder View**:



For information on adding restitution, refer to https://documentation.journaltech.com/ eProsecutorOnline/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, refer to https://documentation.journaltech.com/ eProsecutorOnline/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, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/vouchers.html.

Cash receipts

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

Tills

Use tills to take and track payments made in person.

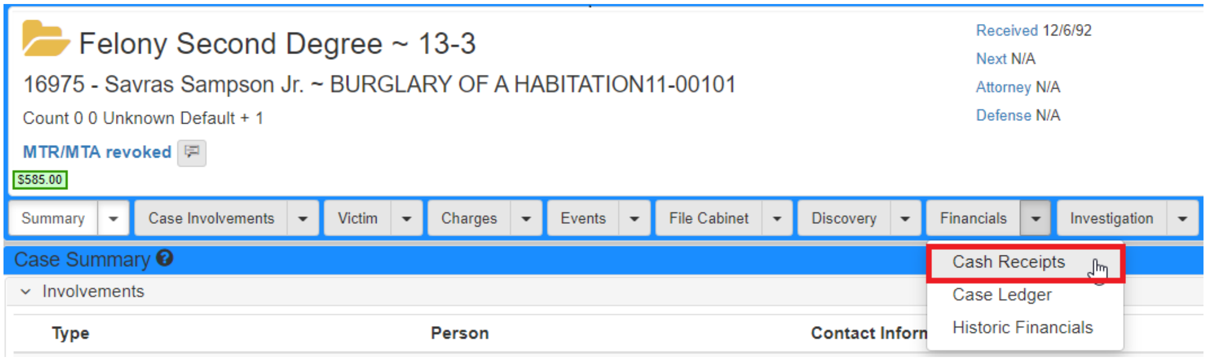
Users must first open a till to take payments.

Opening a till

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

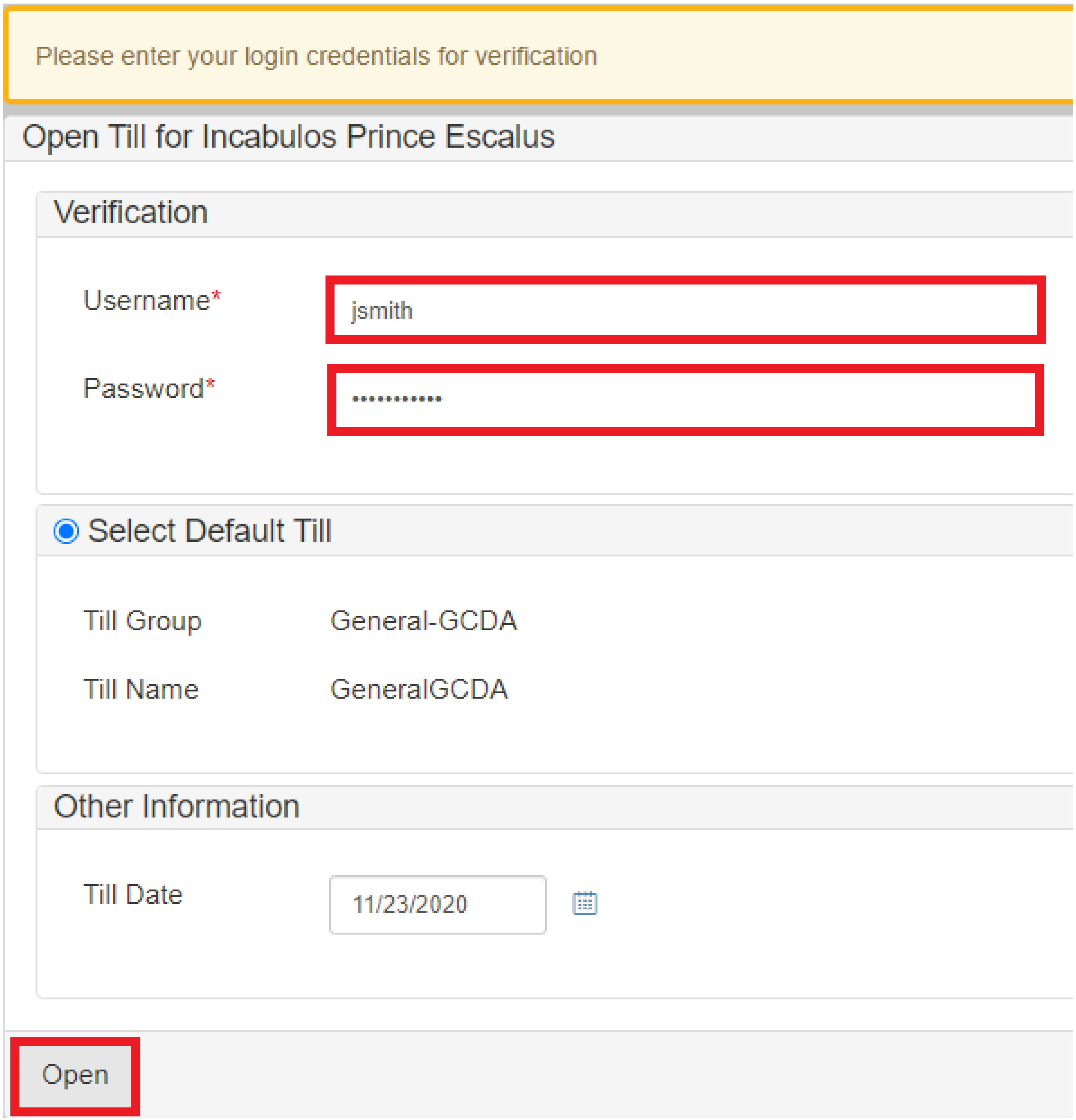
1. Navigate to **Left navigation › Cashier › Cash Receipts › Open Till**.

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.

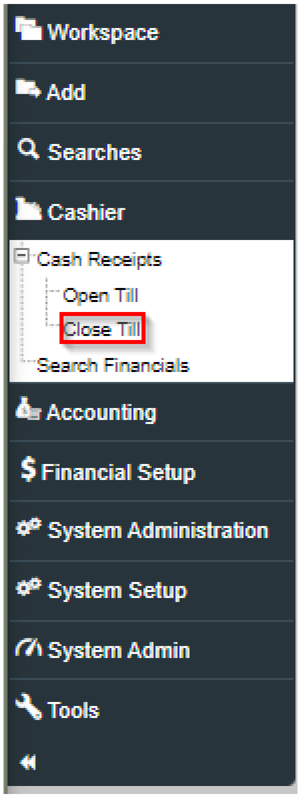


When you have an open till, your till number and a **Cash Register** icon show at the top of the screen:

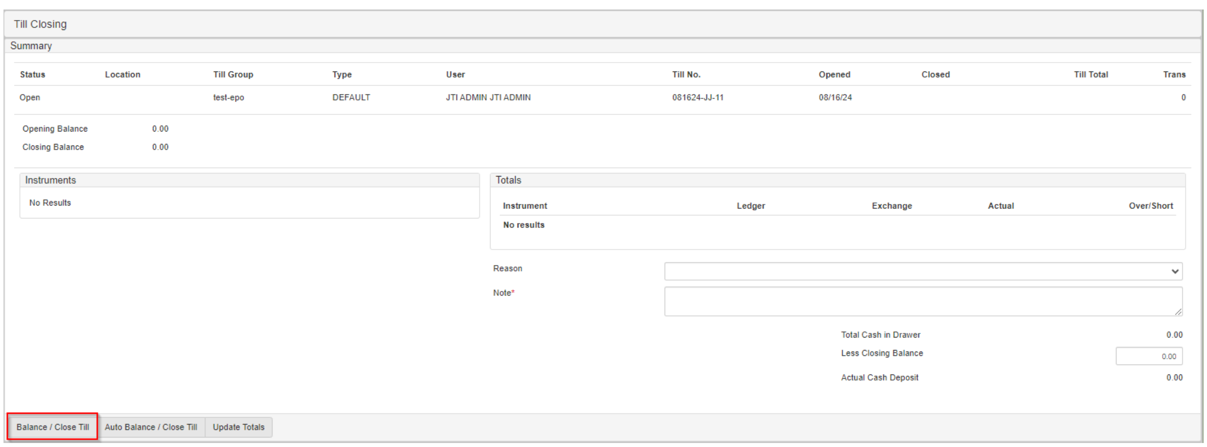
Closing a till

When you finish taking payments for the day, you must close your till. Your administrator can configure automated till closing, but you can manually close your till. To manually close your till:

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



2. Verify the amount in the till.
3. Click **[Balance / Close Till]**.

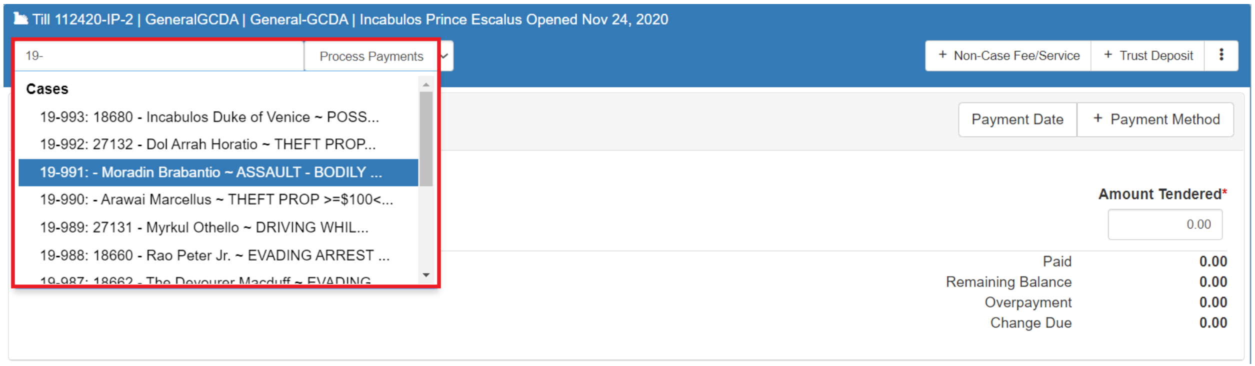


Navigate the cash receipts screen

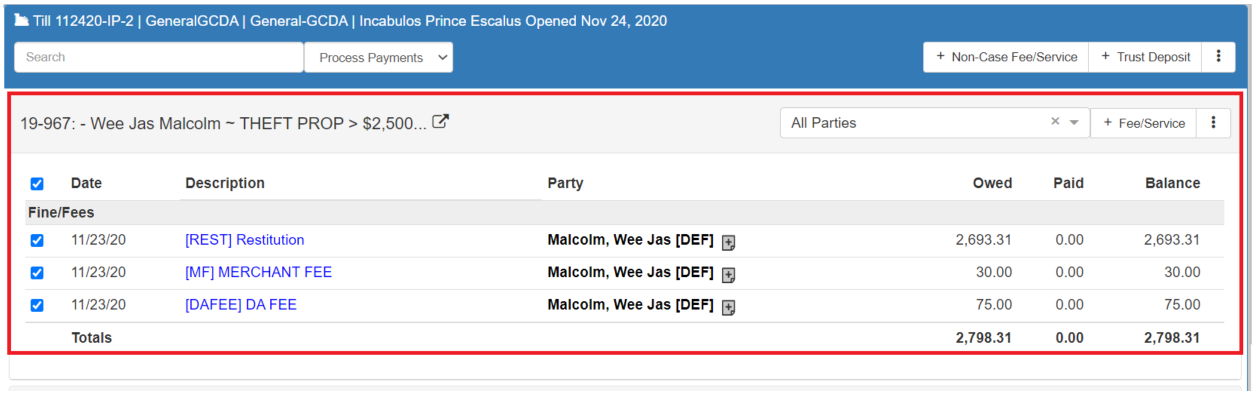
If you access **Cash Receipts** from a case, the screen shows the owed financials for that case. Otherwise, you must search for the case if you want to take payments for it.

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:

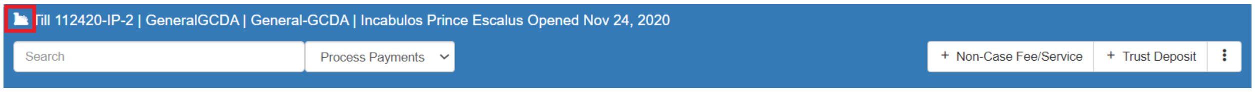


By choosing a case from the list, the **Case Assessment Detail** panel shows. By searching and choosing another case, multiple panels can be shown. A benefit of opening multiple cases is the ability to take payments over more than one case at once.

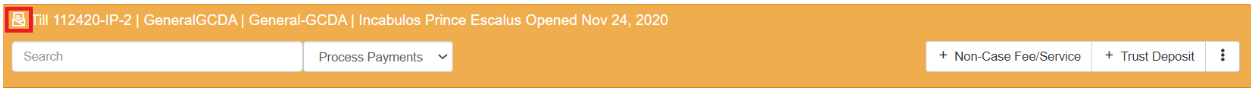


Switch till modes

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.

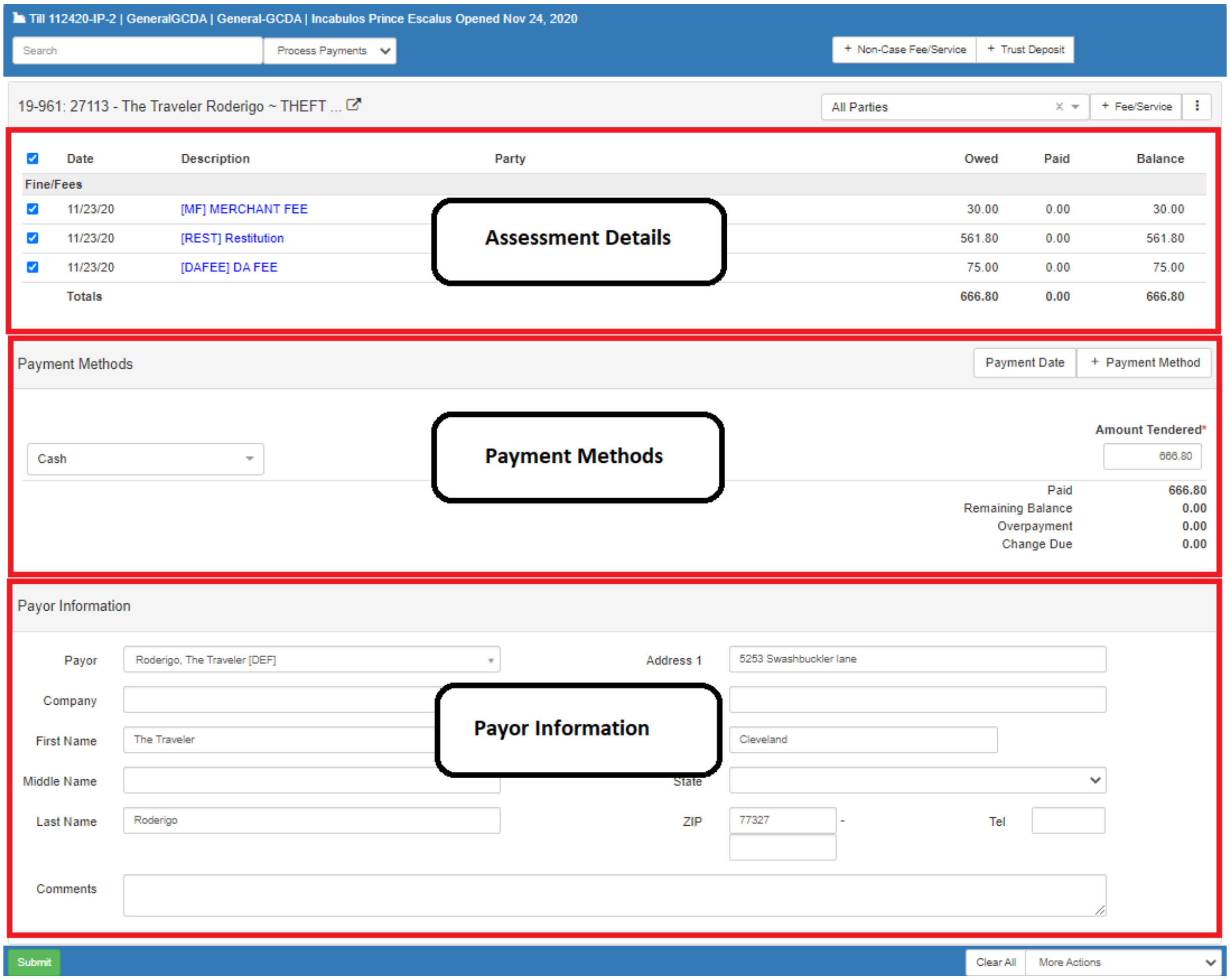


If a user needs to record a payment made by mail, they click the **Cash Register** icon in the upper left corner of the **Cash Receipts** screen. This changes the background color to yellow and replaces the **Cash Register** icon with an **Envelope** icon. This option is only used if you must separate 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**:



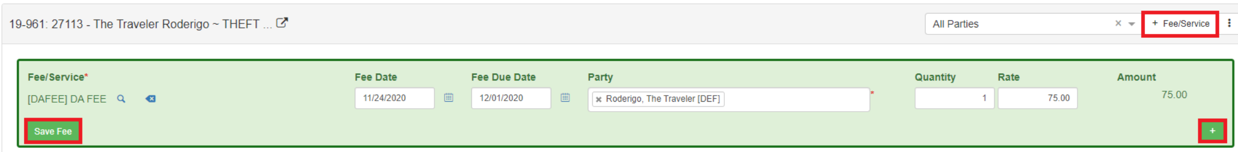
The **Assessment Details** panel shows fees, fines, or services assessed to the case. It is also possible to show more than one case **Assessment Details** panel using the **Case Search** field.

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]**.



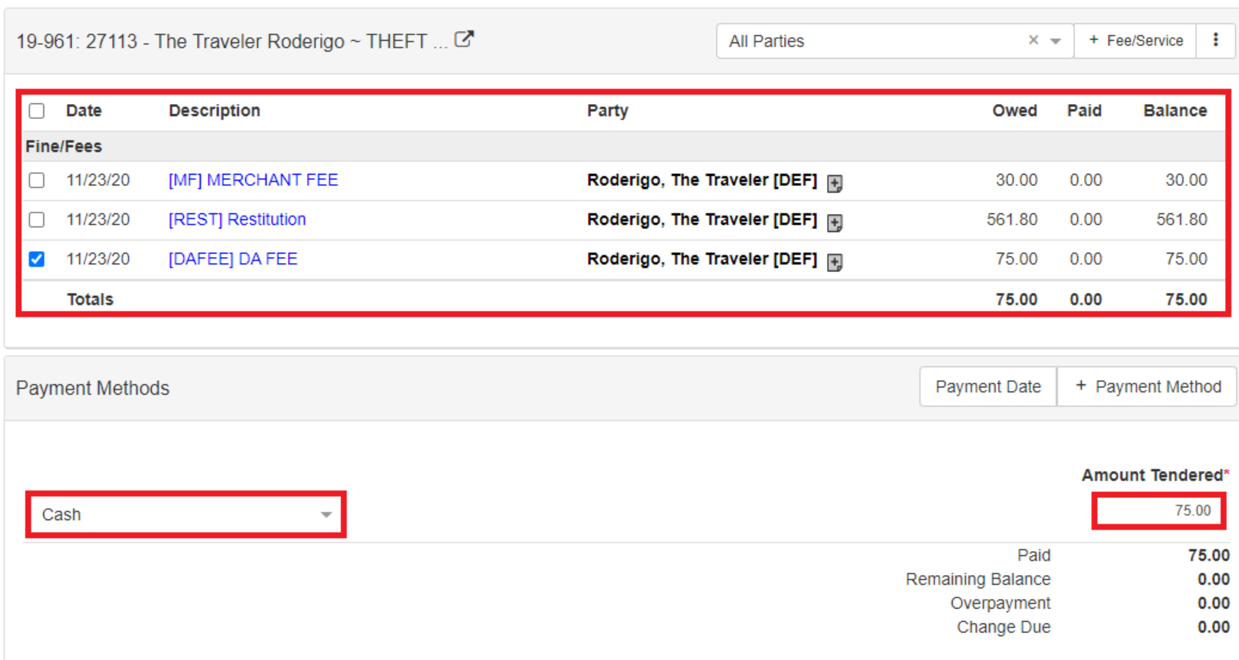
The following options are available when adding a fee:

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.

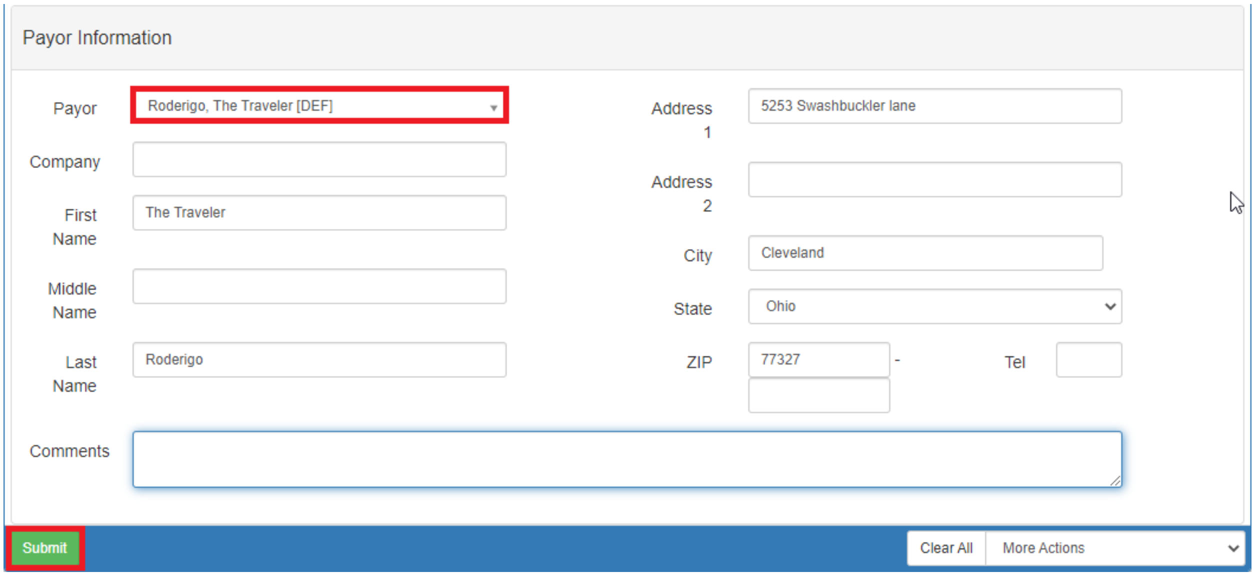
Take a payment

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.

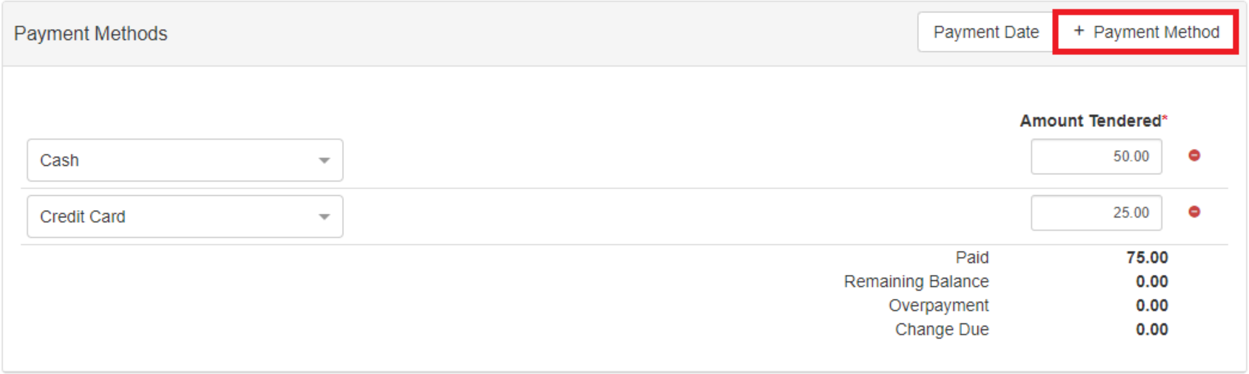


If the invoice is paid in full, it no longer shows on the **Cash Receipts** screen and a printable receipt is shown. The receipt can be reprinted from the **Case Ledger** screen.

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.

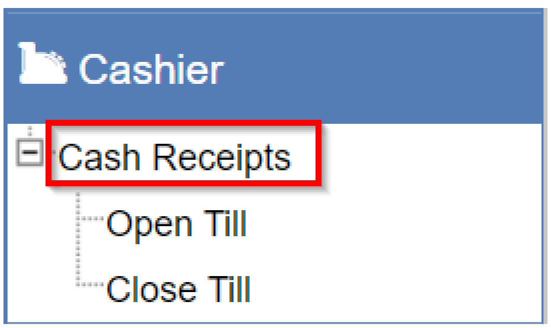
Accessing a payment plan

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

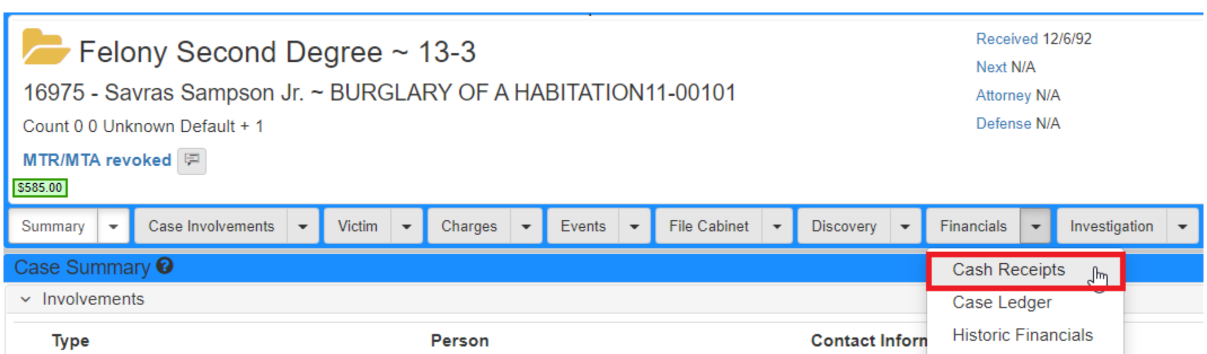
Only Financial users can navigate to the **Cash Receipts** screen. For more information about setting up a user as a Financial User, refer to User navigation.

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**.

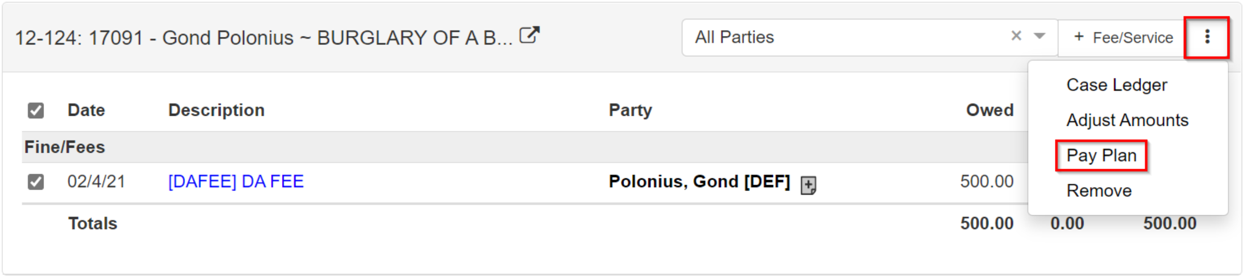


If accessed using the Left navigation, the Case is not populated on the **Cash Receipts** screen. You need to search for the case you would like to work with. Refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/cash_receipts.html for more information on searching. If accessed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

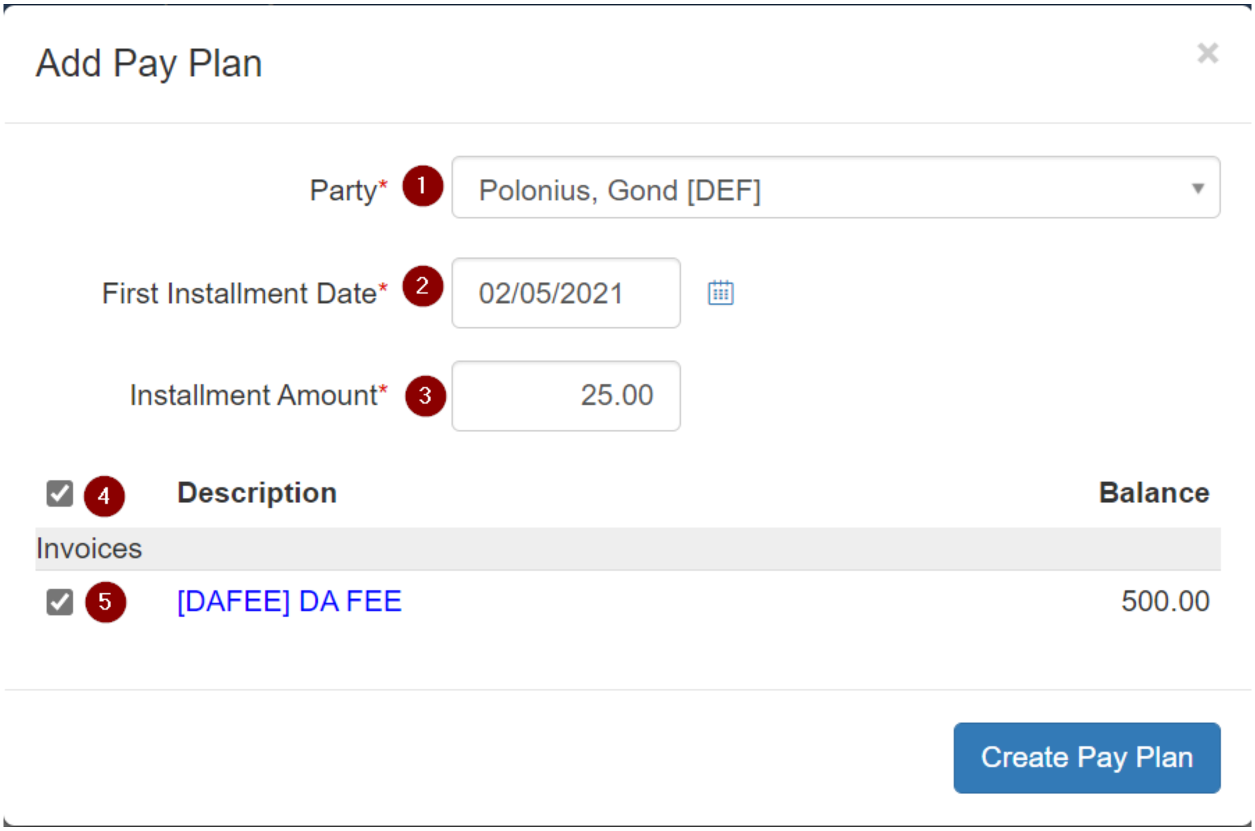
Adding a payment plan

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:

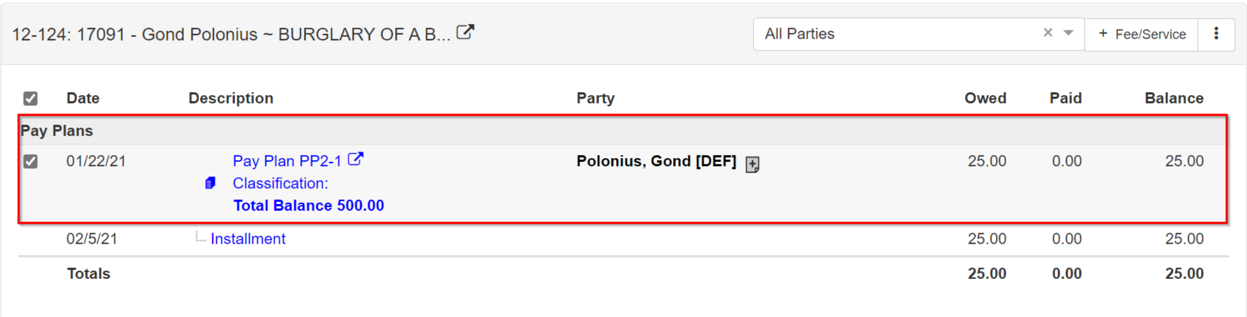


1. Use the **Party** dropdown to select the paying party.
2. Set the payment plan **First Installment Date**.
3. Set the recurring **Installment Amount**.

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.

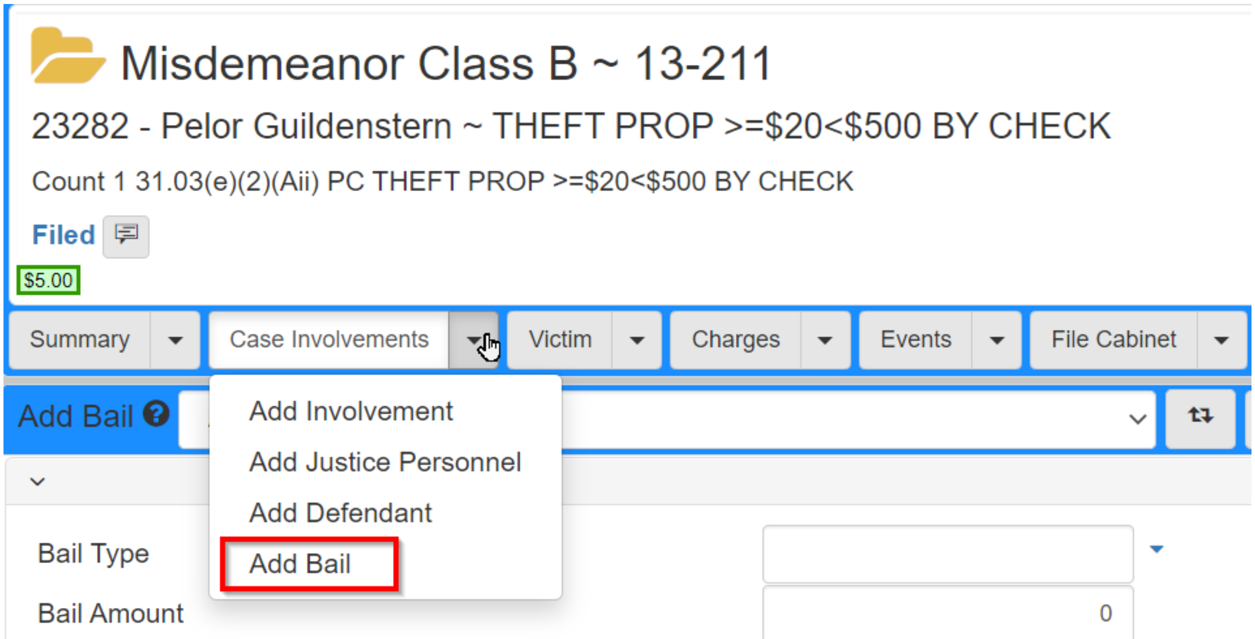


Bail

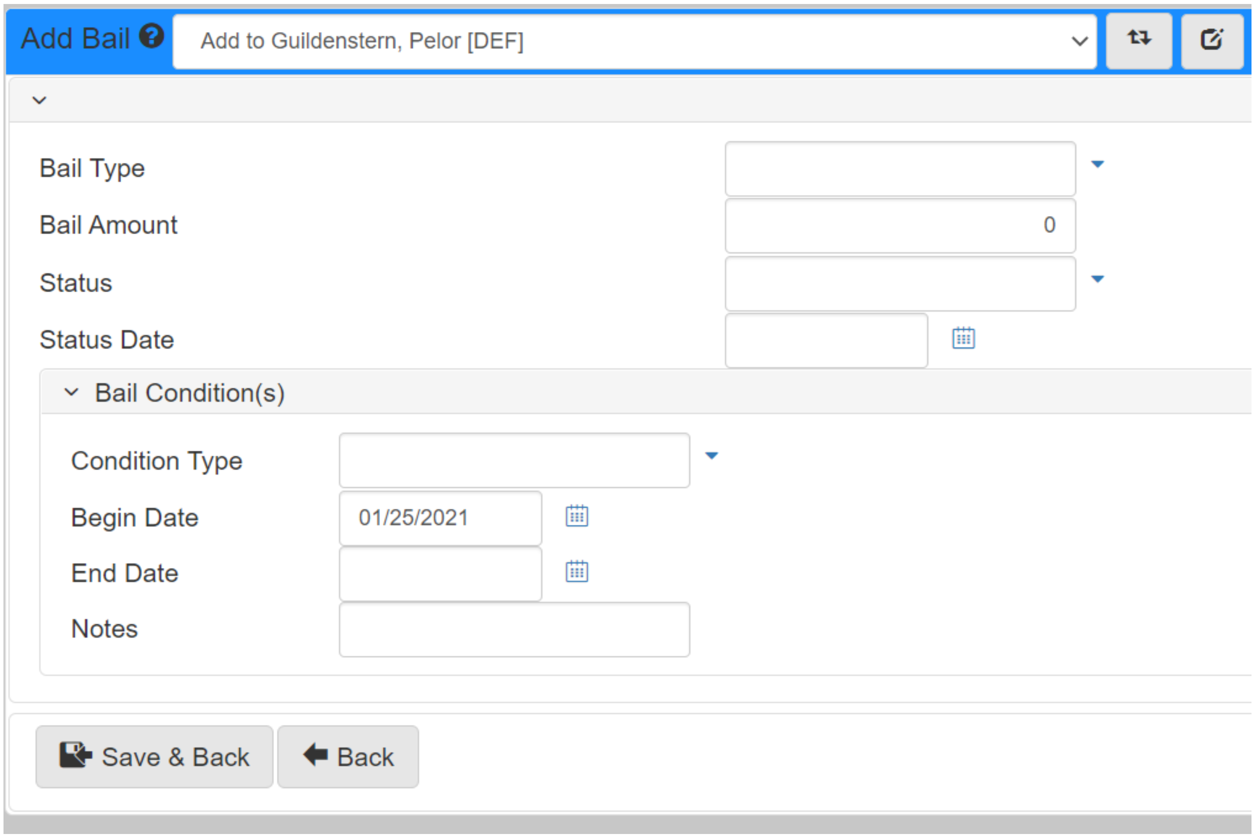
Do not forget to `Open a Till` if you have not already today.

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

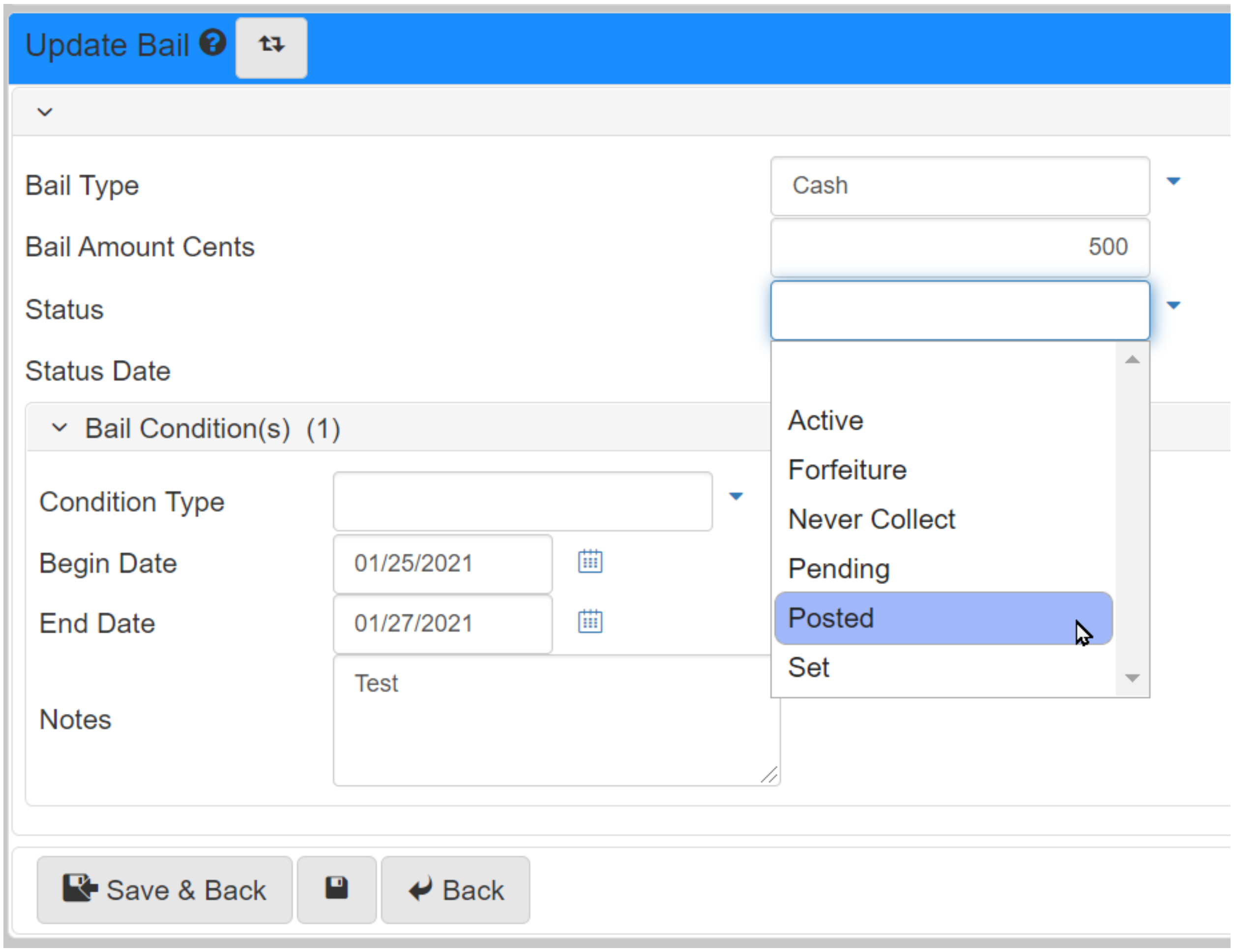
Post cash bail

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.

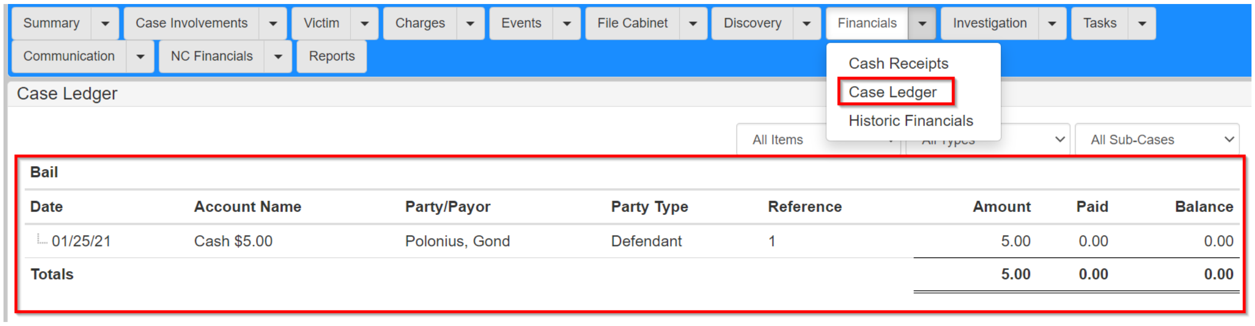
Bail

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]**.

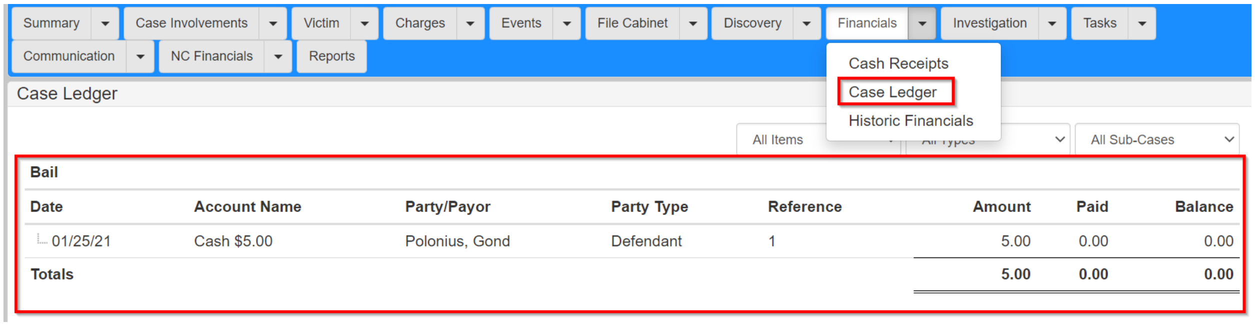


The updated status shows on the **Case Involvement** screen. The **Bail** also shows on the **Case Ledger**. The **Bail** can now be paid into eProsecutor Online.

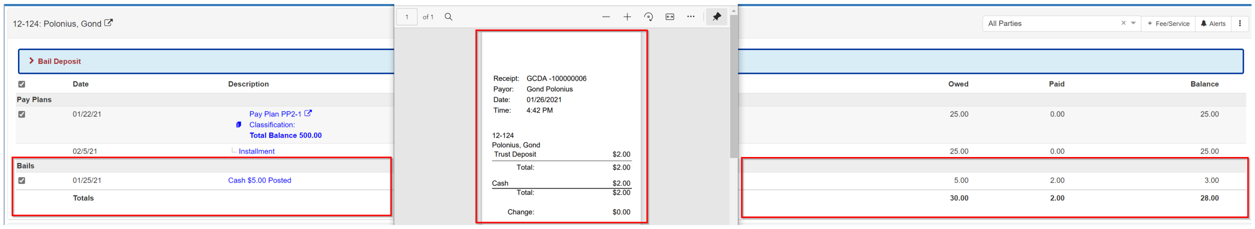


Navigate to **Cash Receipts** and pull up the case you are taking the payment on. It is easier to do this from the dropdown of the **Financial** tab from the **Case Record** as it loads **Cash Receipts** with the case pulled up. Select the **Bail** item under the **Bails** panel.

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]**.



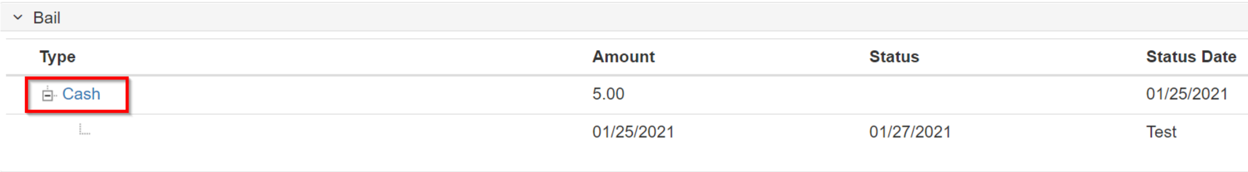
After taking the payment, the **Cash Receipts** screen refreshes and shows an indicator that there is a **Bail Deposit** on the case. Also, a **Cash Receipt** popup window shows giving you the payment information. In the following example, part of the **Bail** is paid.



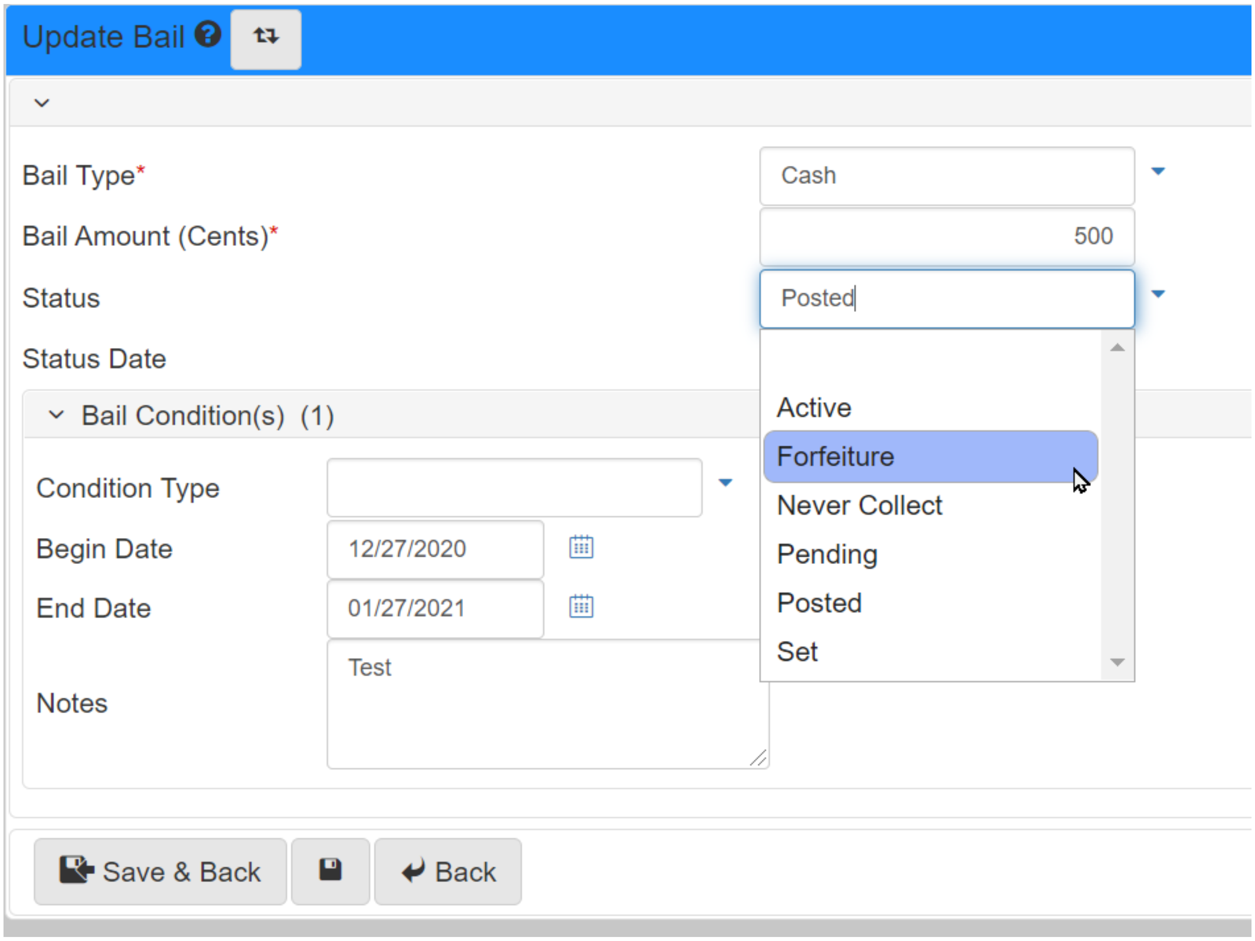
The **Case Ledger** also shows the reflected **Bail** payment, which also shows in the case header.

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.

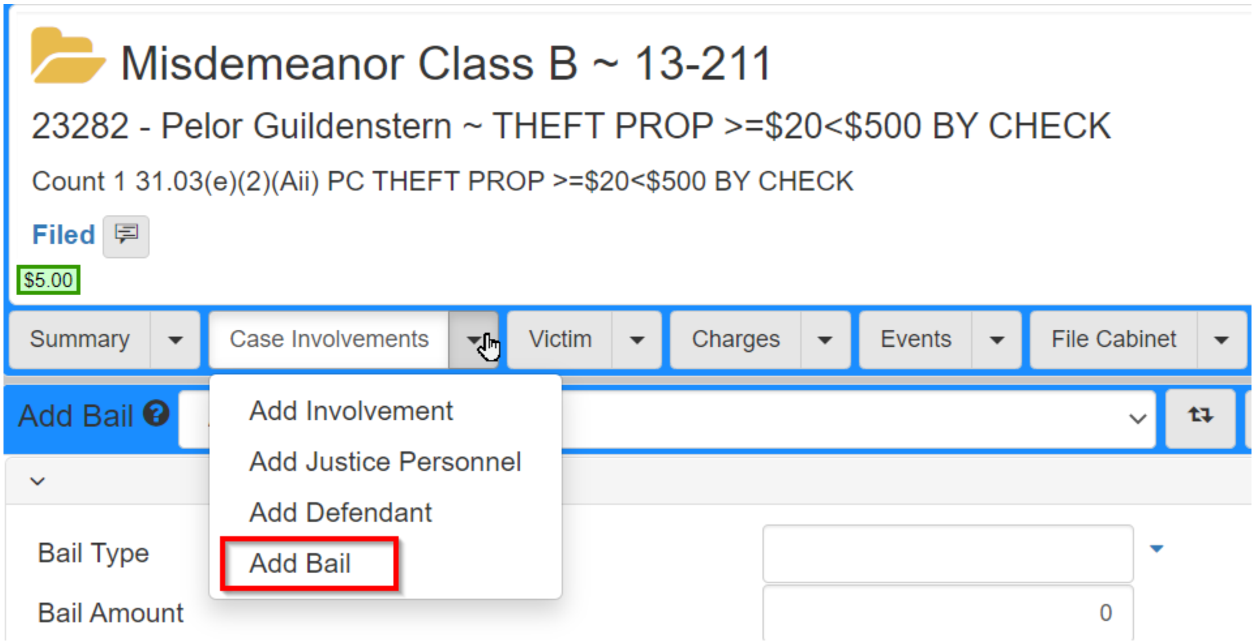
Refunding cash bail

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

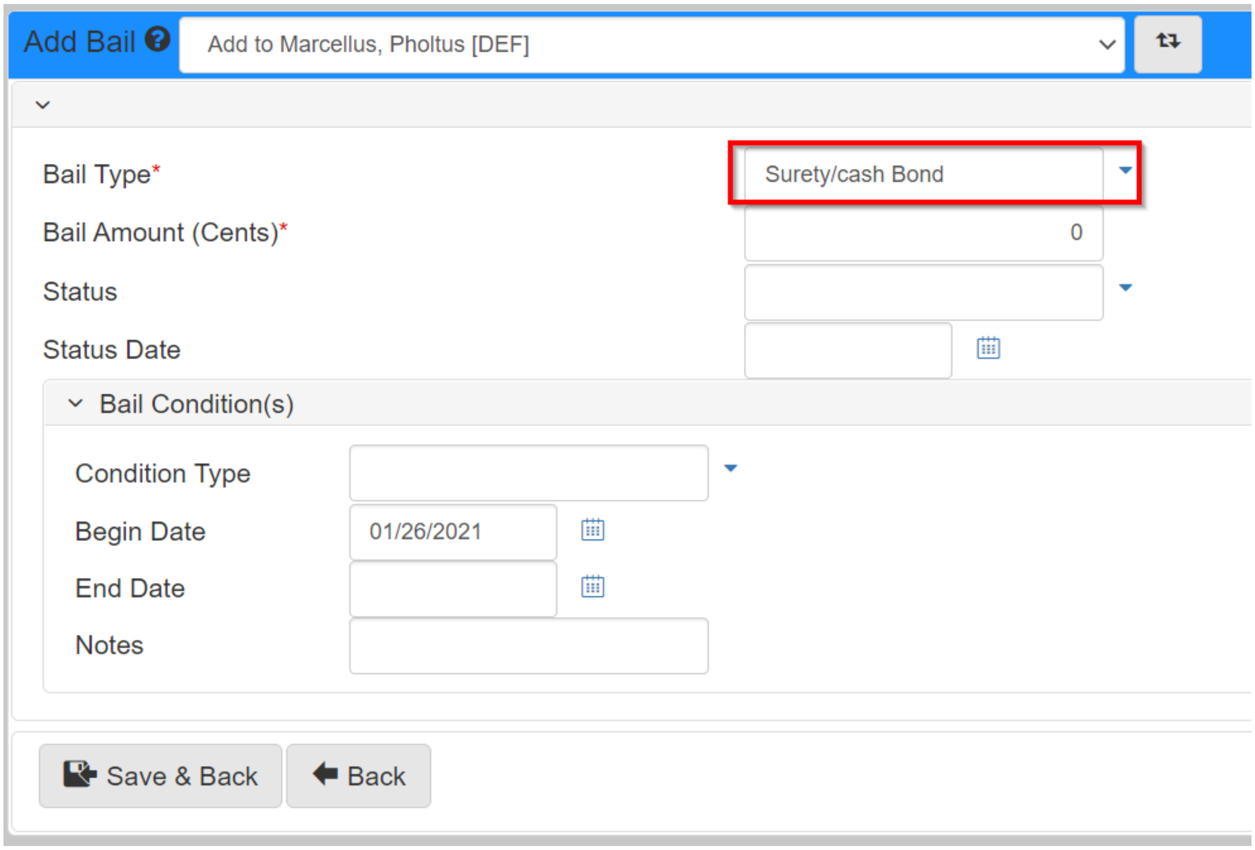
Bail bond/surety

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.



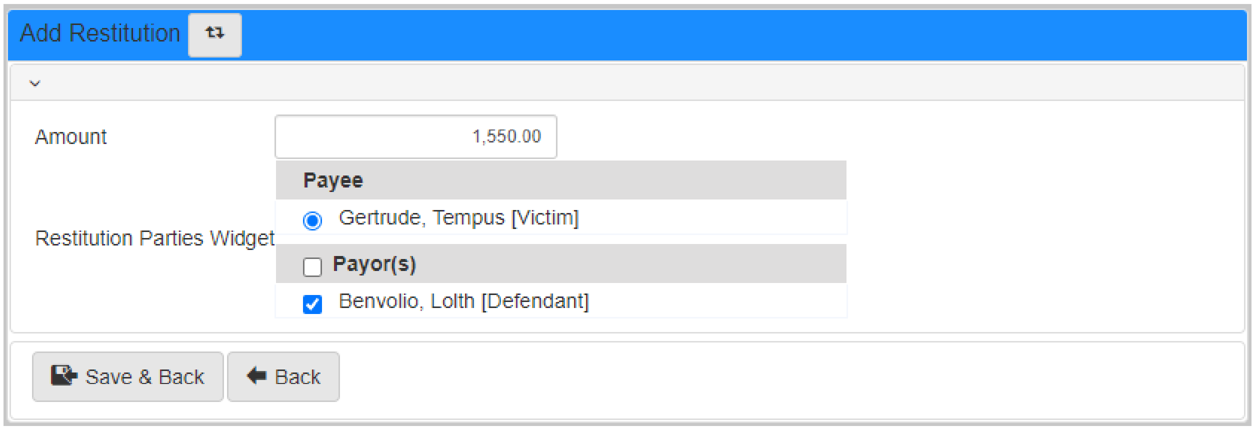
Once you have entered the data, click **[Save & Back]**. The set **Bail** shows on the bottom of the **Case Involvement** screen.

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:



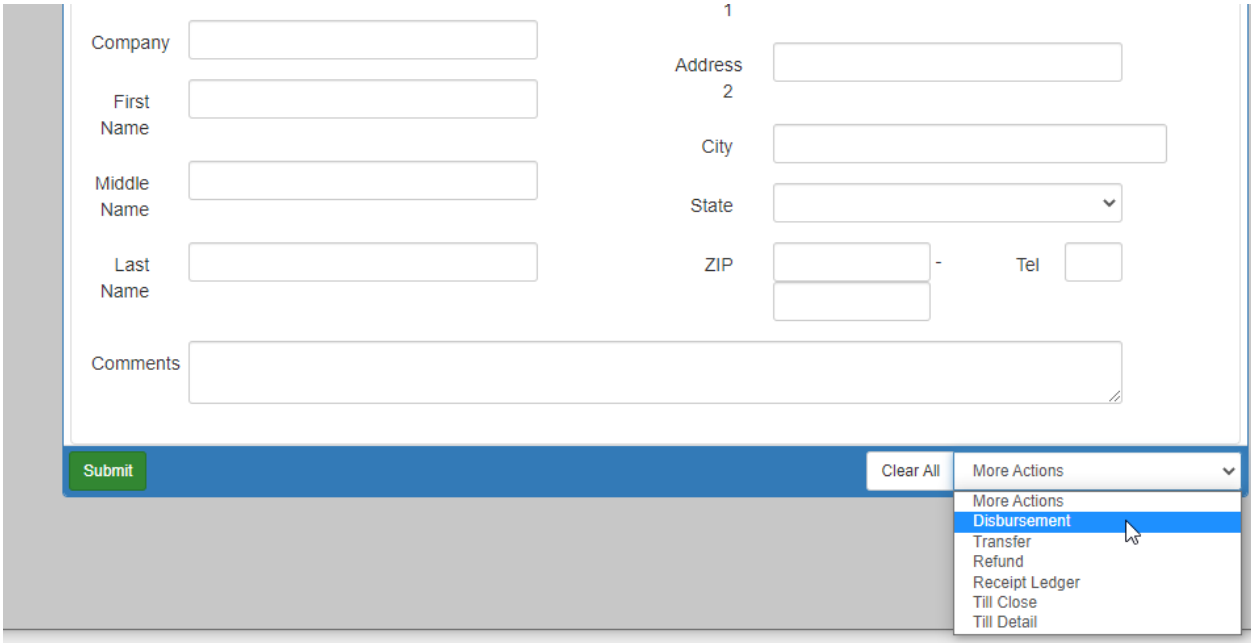
Taking a restitution payment

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/eProsecutorOnline/user/financials/cash_receipts.html for details on how to take a payment.

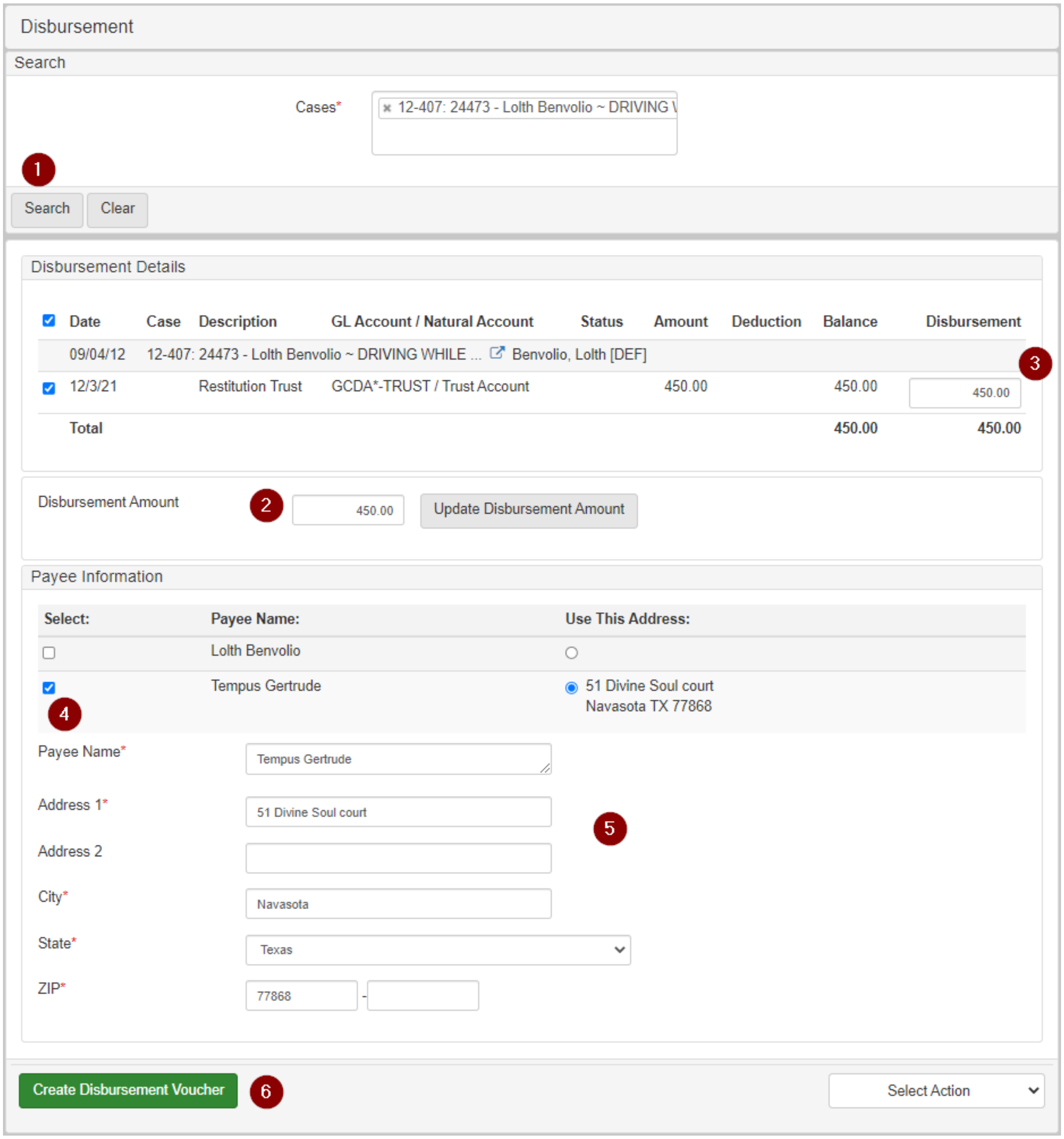
Disbursing restitution

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**:

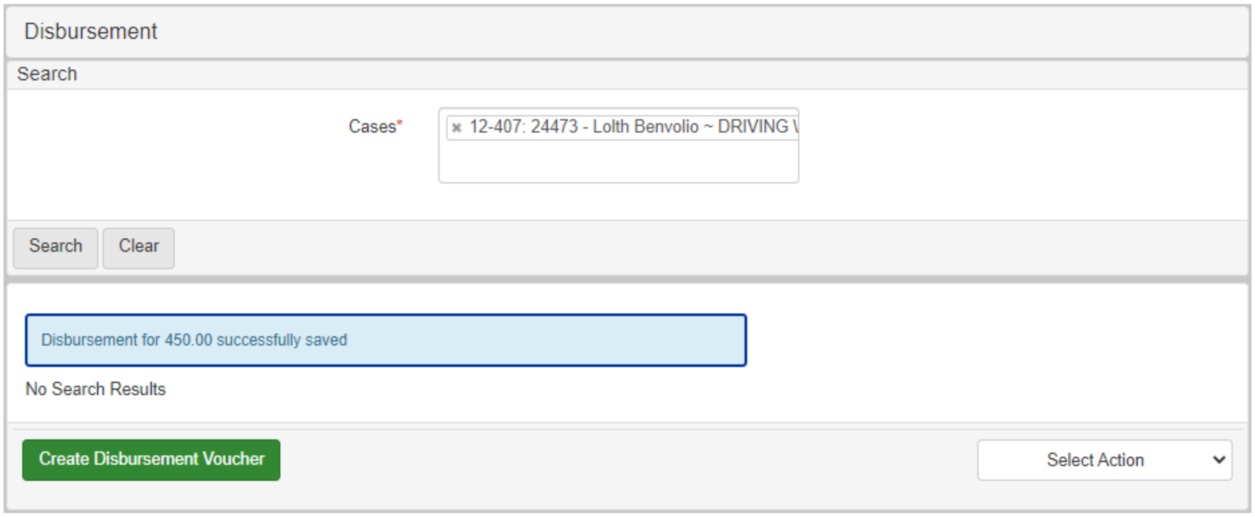


This **Disbursement** screen shows. To create a disbursement:

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

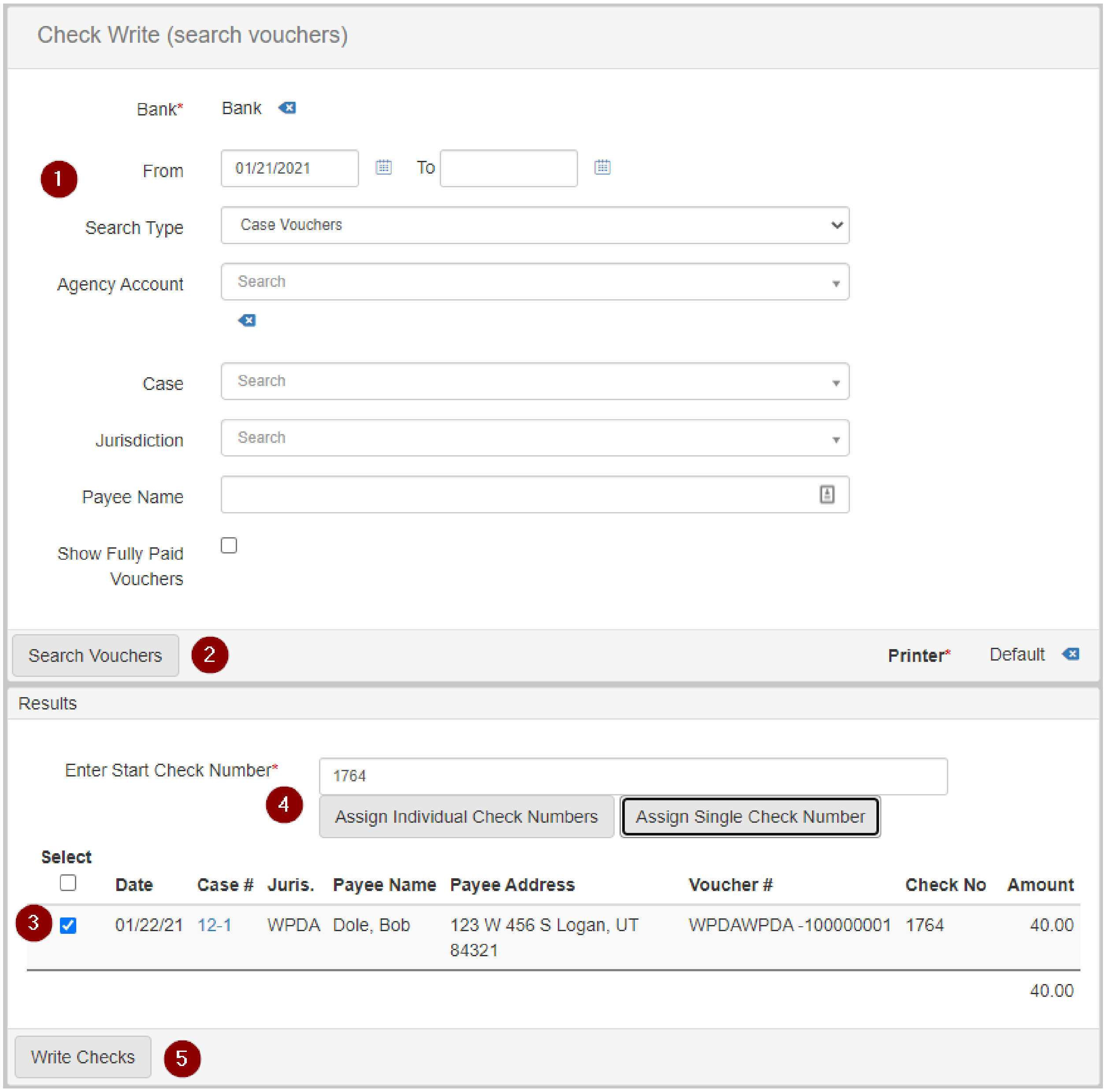
After a disbursement is successfully created, a check for the restitution can be written to the payee.

Refer to the https://documentation.journaltech.com/eProsecutorOnline/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.

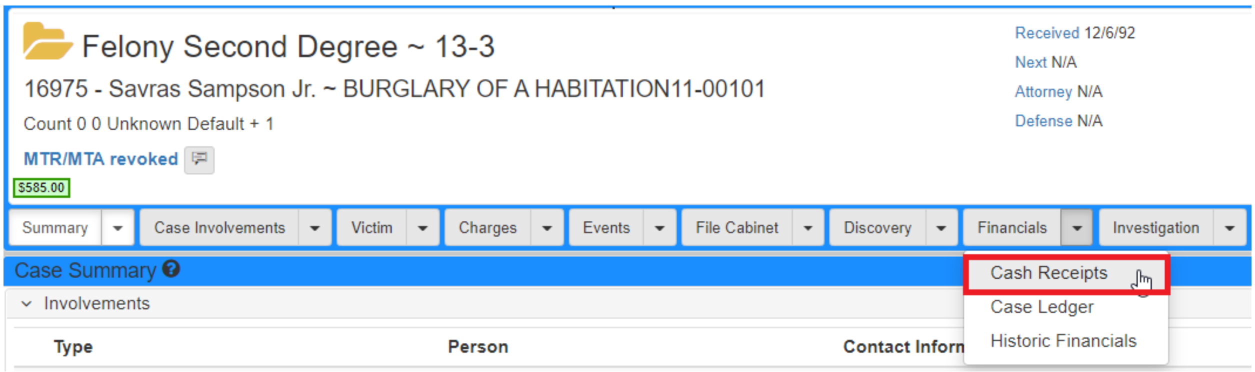
Transfers

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.

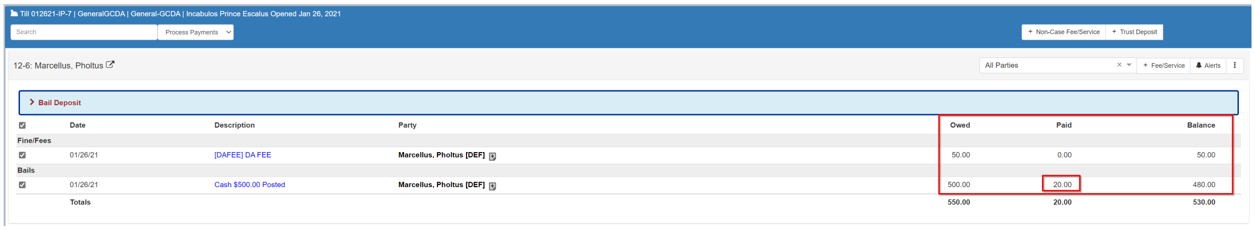
Creating a transfer: between single case obligations

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

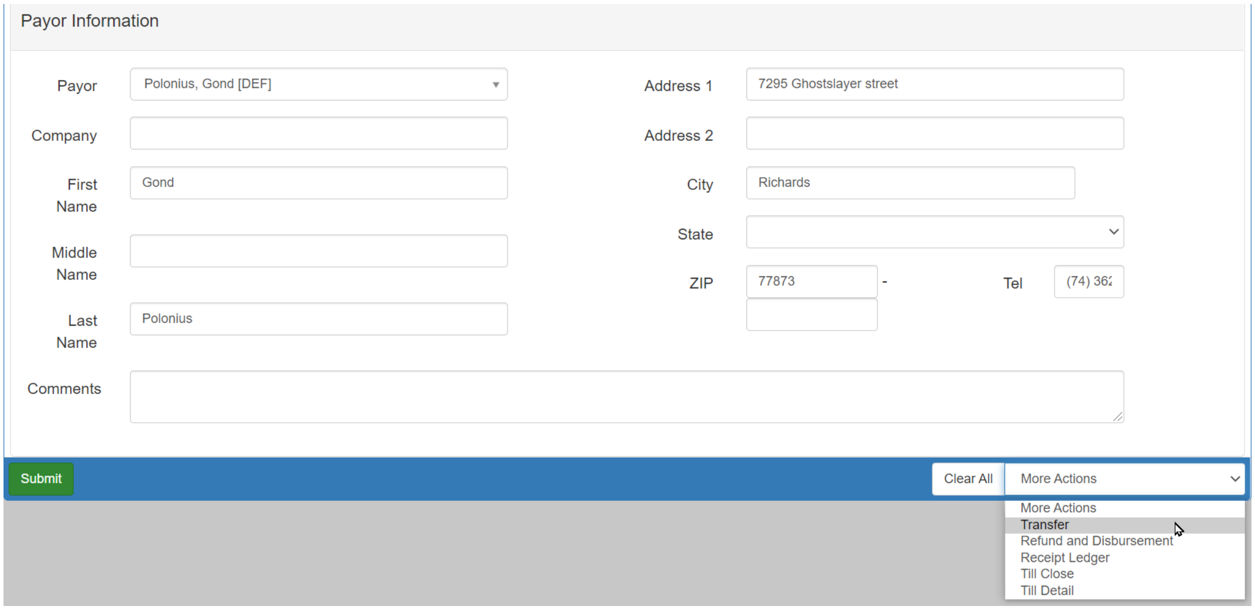
Navigate to the **Cash Receipts** screen from the case: click the **Financials** dropdown, then select **Cash Receipts**.



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:

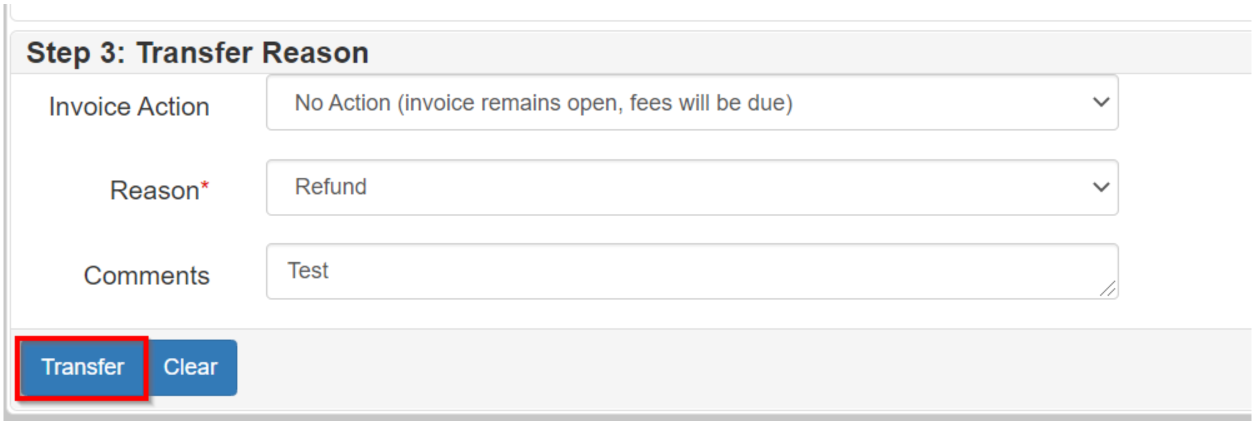
In this example, money should be moved from one obligation to another. In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations, if needed.

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:

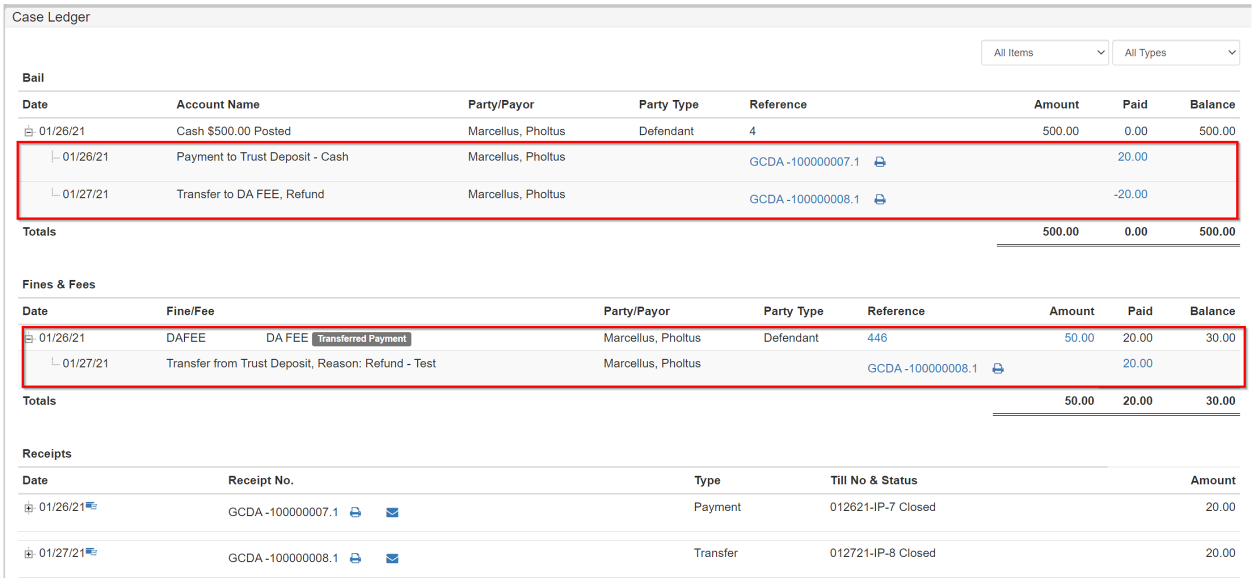
Step 3: transfer information

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**.

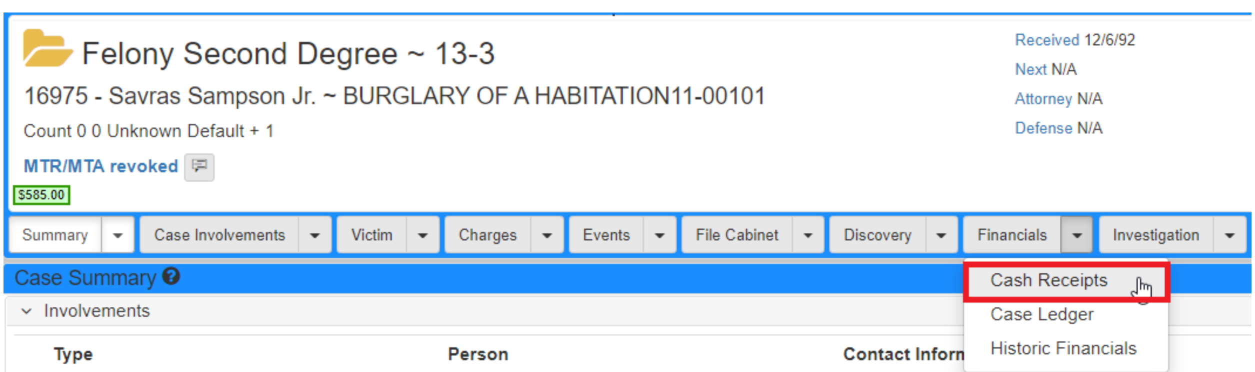


There should also be a receipt in reference to the transfer.

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.



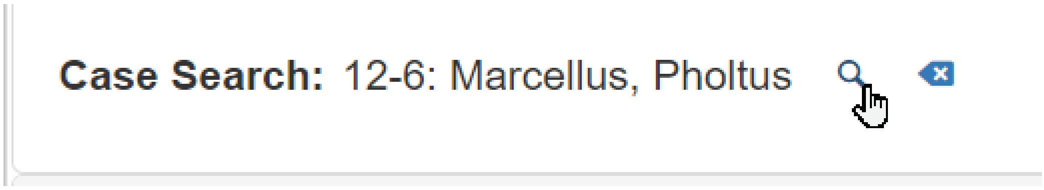
Step 1: items deducting money

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.

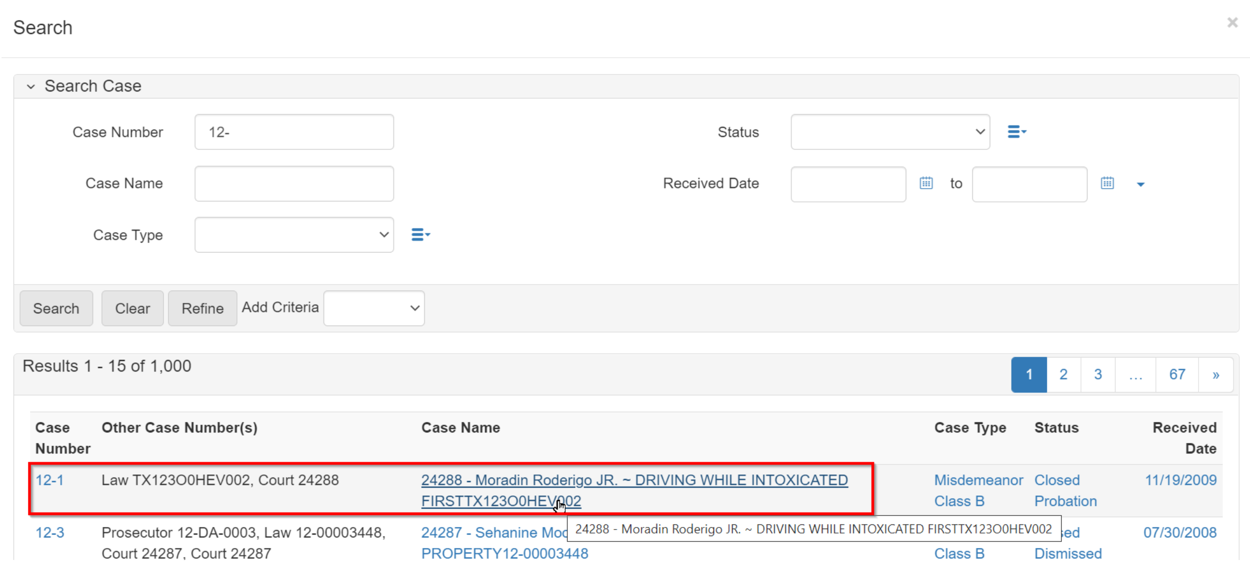
Click **[Next]**. An extra panel shows after the first.

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.



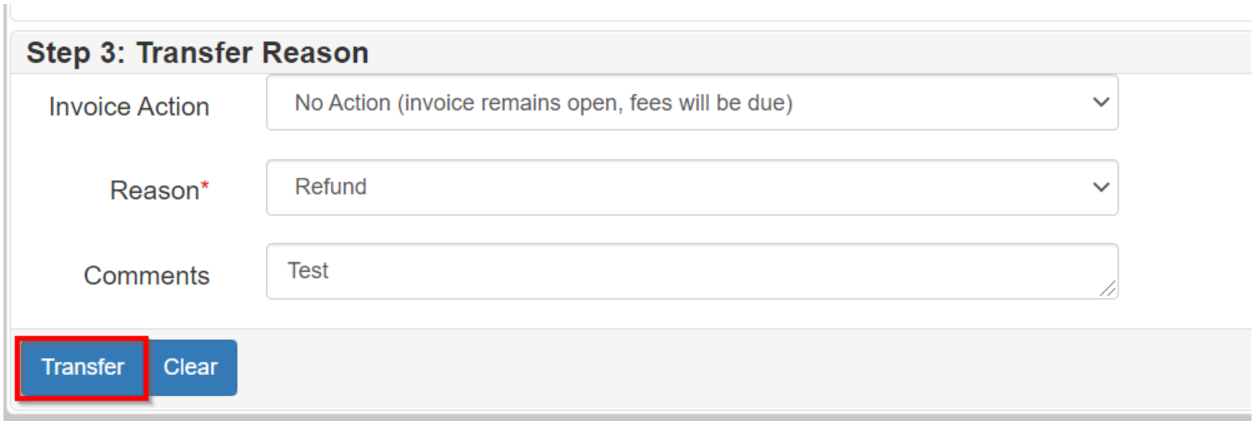
In the **Choose and Add Items to Receive Money** section, select the items to transfer to. You can also select multiple obligations.

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

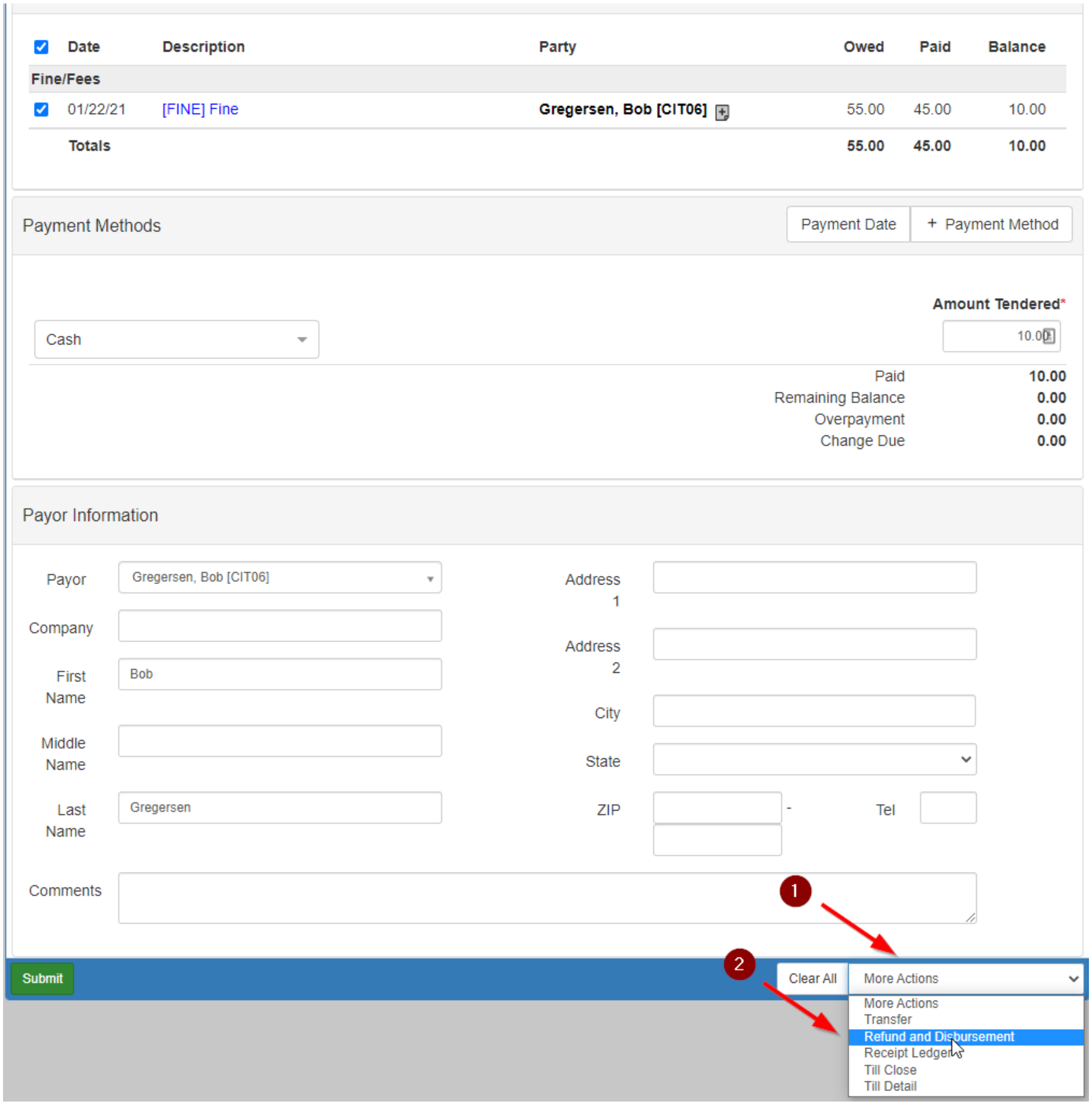
A refund can be given when money needs to be returned to an individual that has already paid a fine or fee on a case.

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.

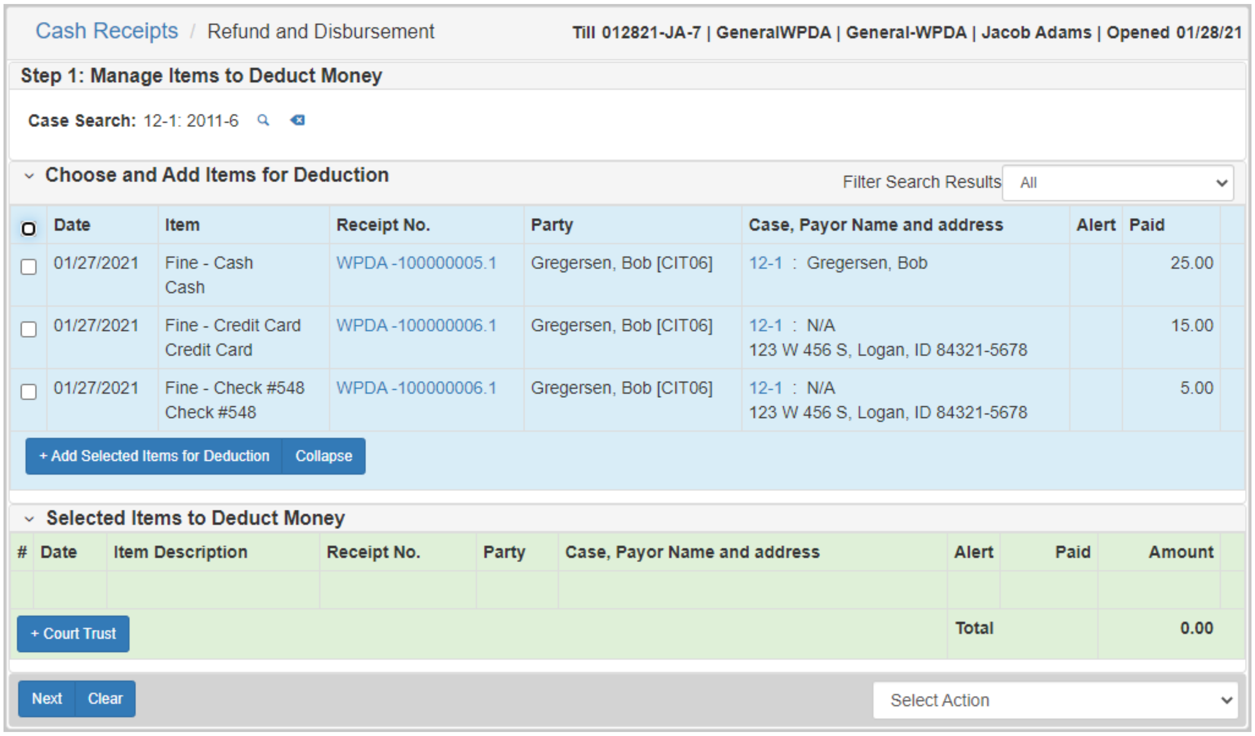
Navigate to refunds

Refunds can be accessed from the Cash Receipts [https://documentation.journaltech.com/eProsecutorOnline/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**:



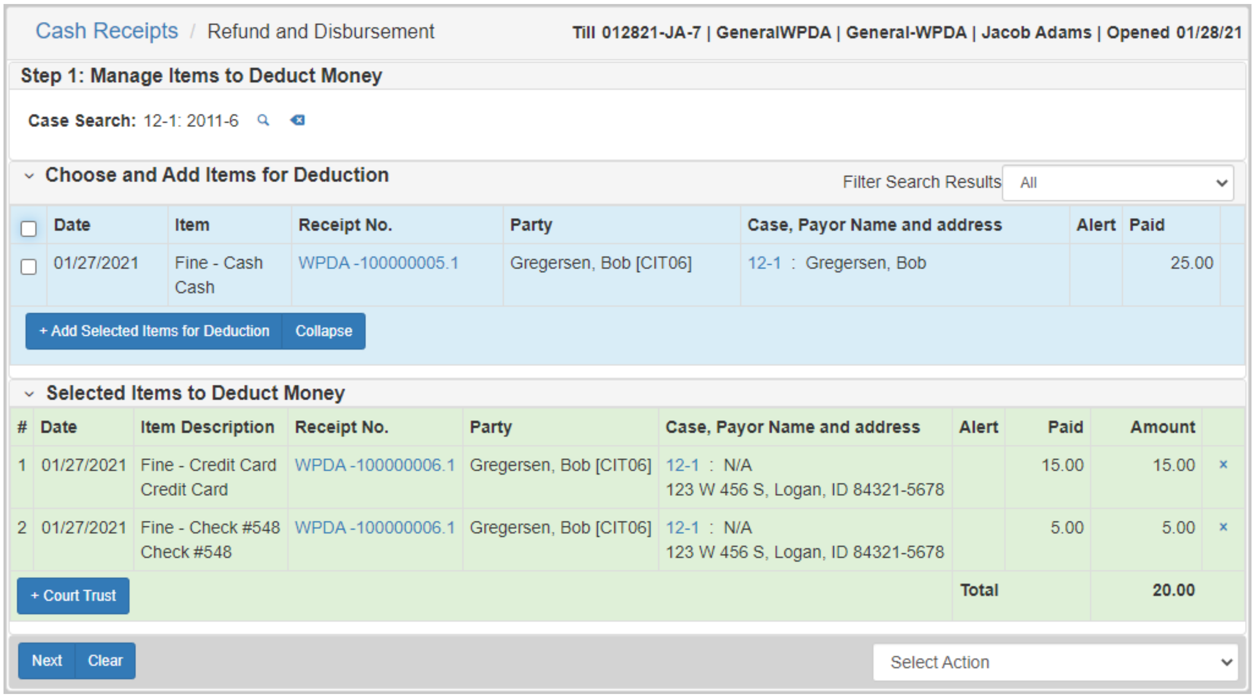
Create a refund request

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



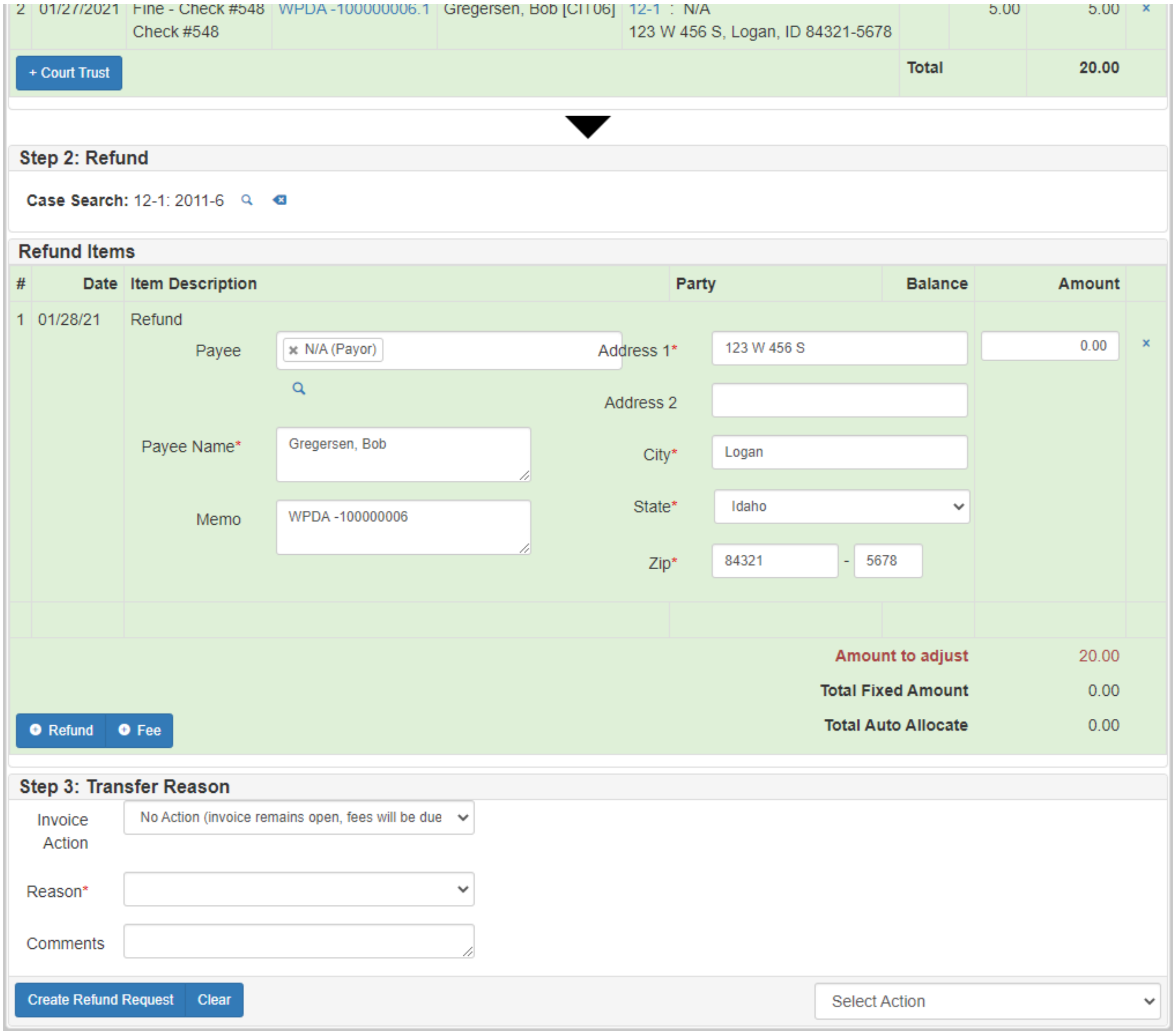
Start the refund by selecting the case payments that you would like to include in the refund. Do that by selecting the checkbox next to each payment to include.

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



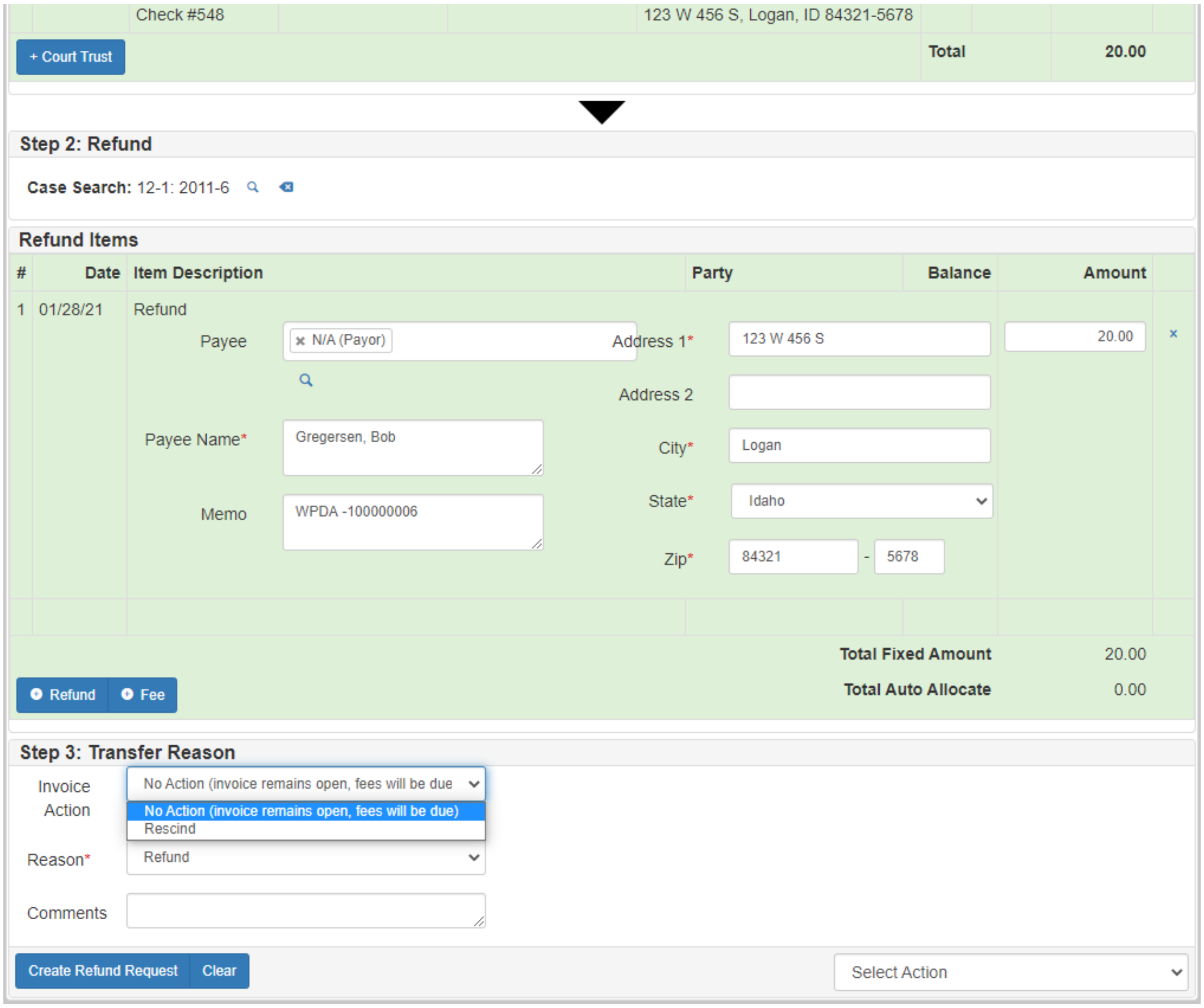
The payments are added to the **Selected Items to Deduct Money** section. Review the payments and verify that everything is correct.

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]**.

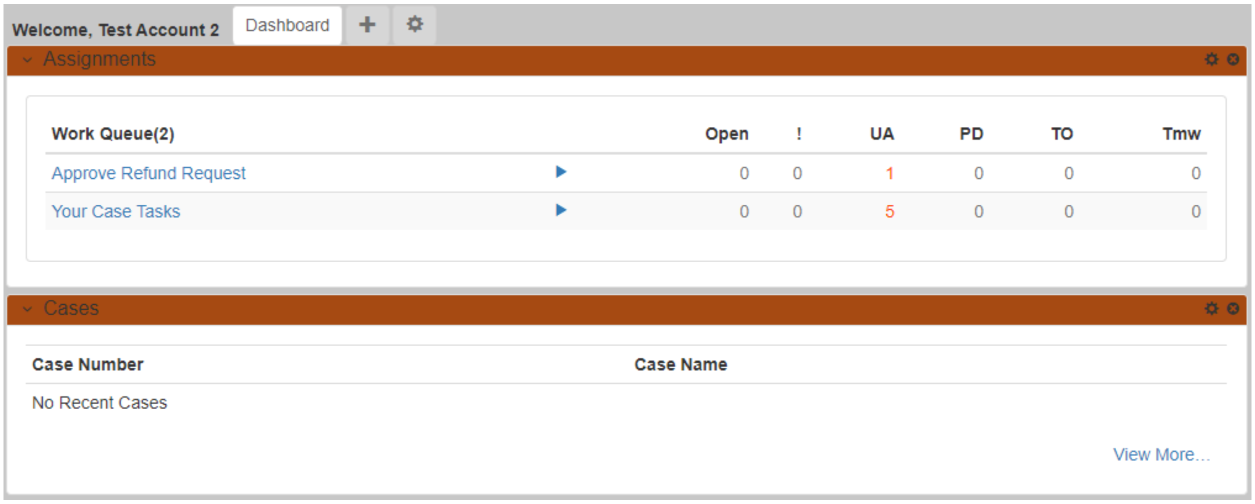


To complete the refund request, enter an invoice action (**No Action** or **Rescind**), enter the reason for the refund, and optionally add comments about the refund. After filling in the required information, click **[Create Refund Request]** to create the refund request that somebody else must approve.

Approve a refund request

When a user creates a refund request, it must be approved by a different eProsecutor Online 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]**.

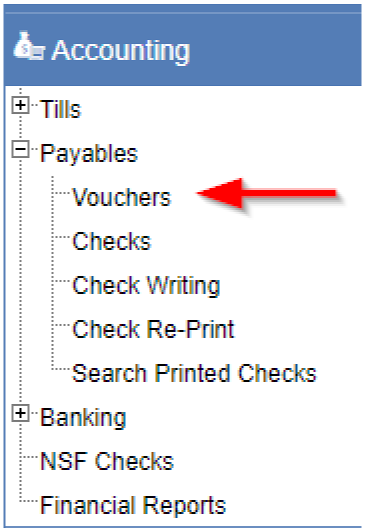
Once a refund request is approved, the refund can be sent to the payee.

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/eProsecutorOnline/user/financials/check_writing.html for details on how to complete that task.

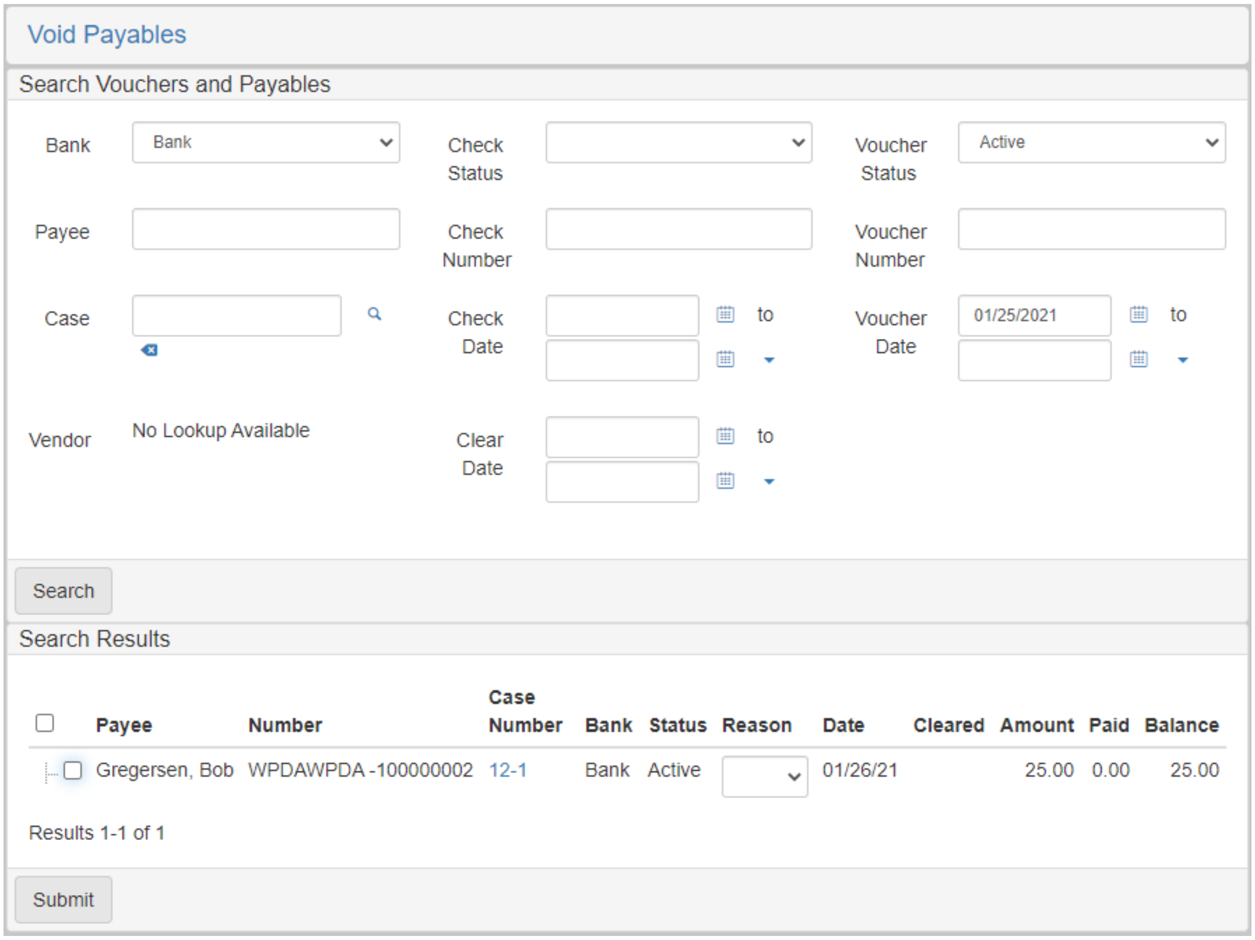
Vouchers

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

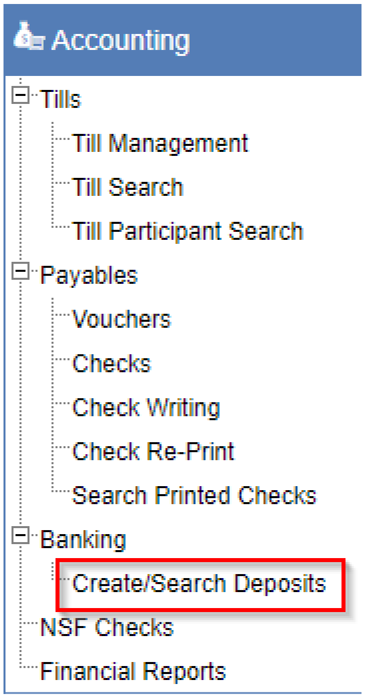
To write a check for an existing voucher, refer to https://documentation.journaltech.com/eProsecutorOnline/user/financials/check_writing.html.

Deposits

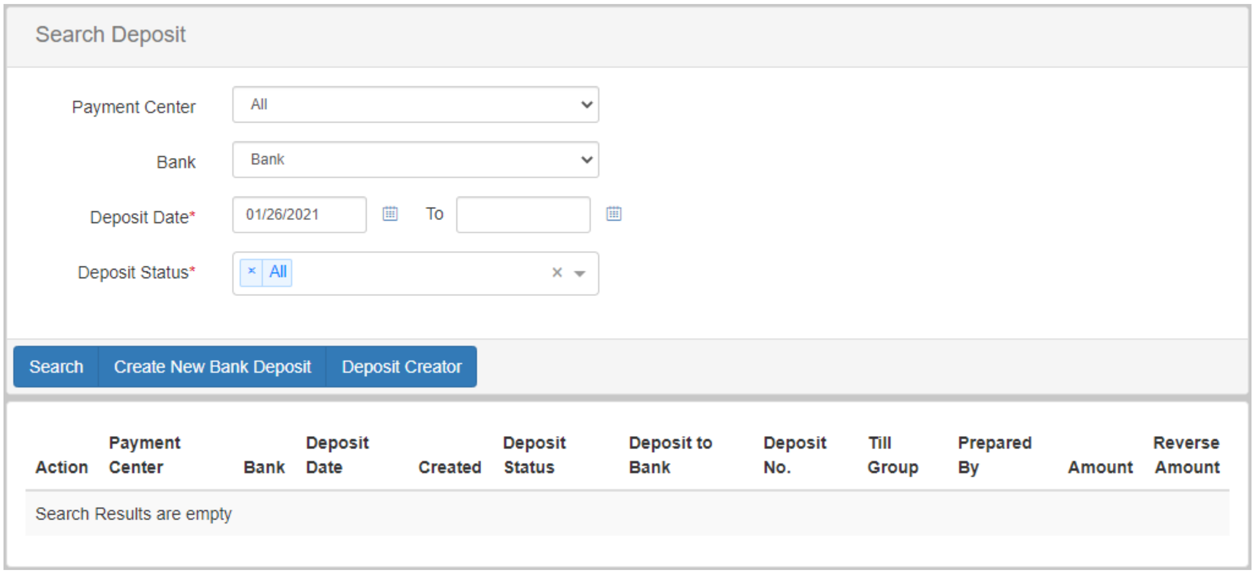
Deposits are used to record money taken to the bank. Individual tills are added to a deposit and all the money in each till makes up the deposit total.

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:

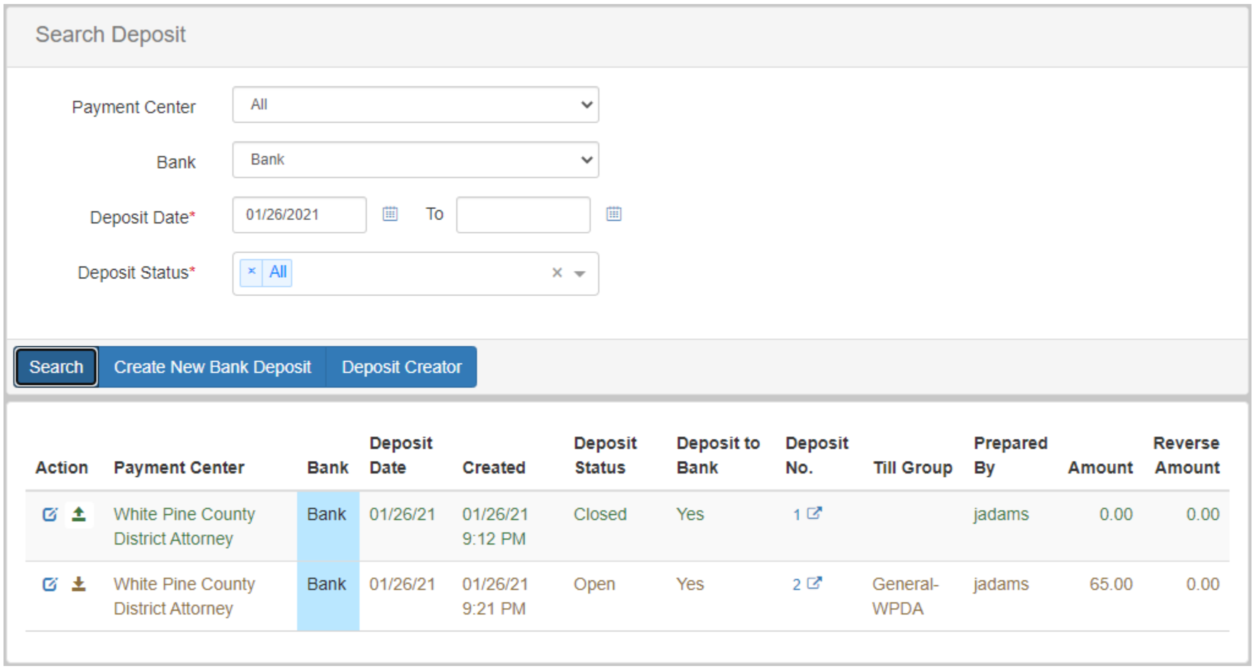


On this screen, you can create new deposits and search for and edit existing deposits.

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:

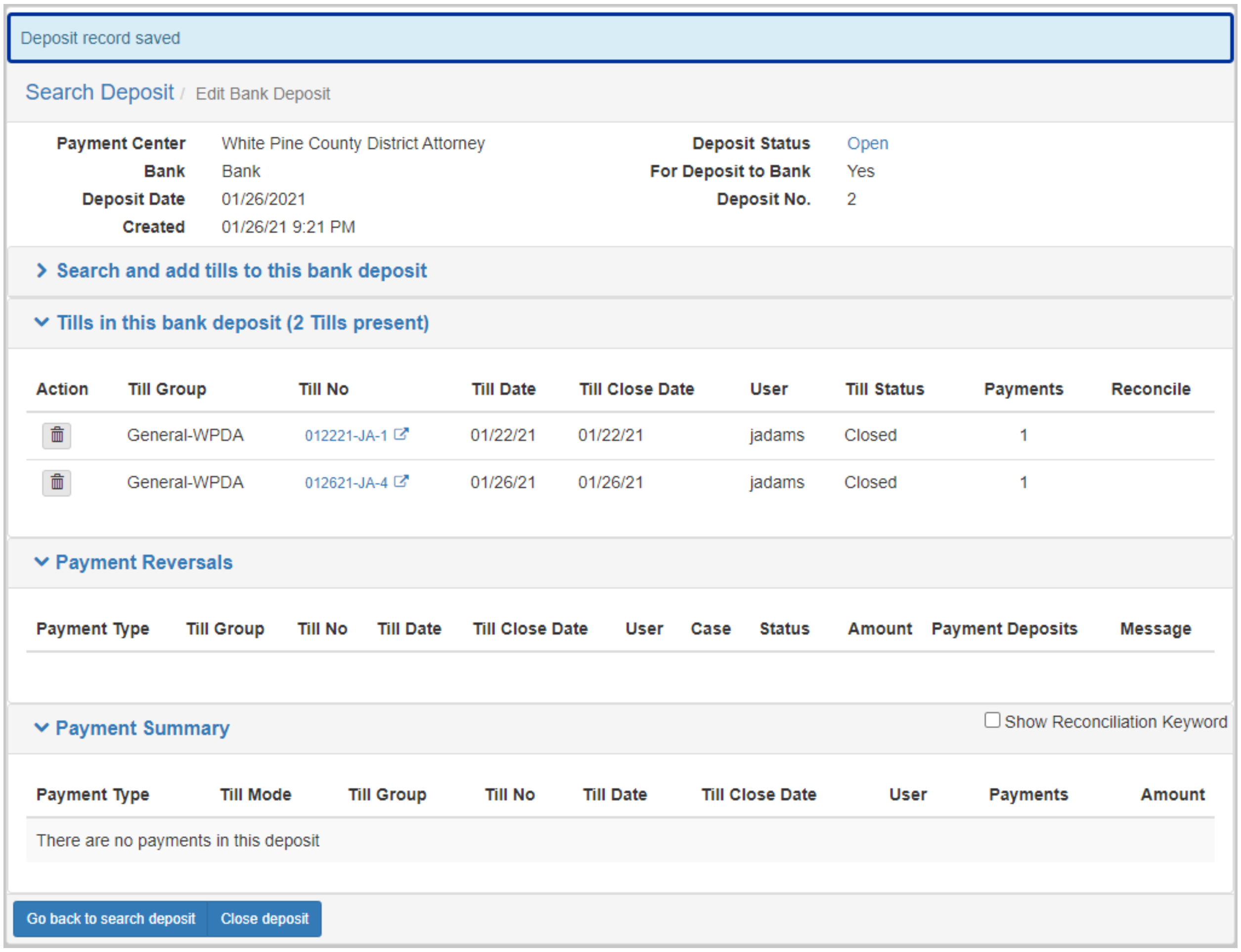
- View the details of the deposit.
- Click the link in the **Deposit No.** column to open the Deposit Details screen.
- Click the up or down arrow in the **Action** column to reopen or close a deposit.

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]**.

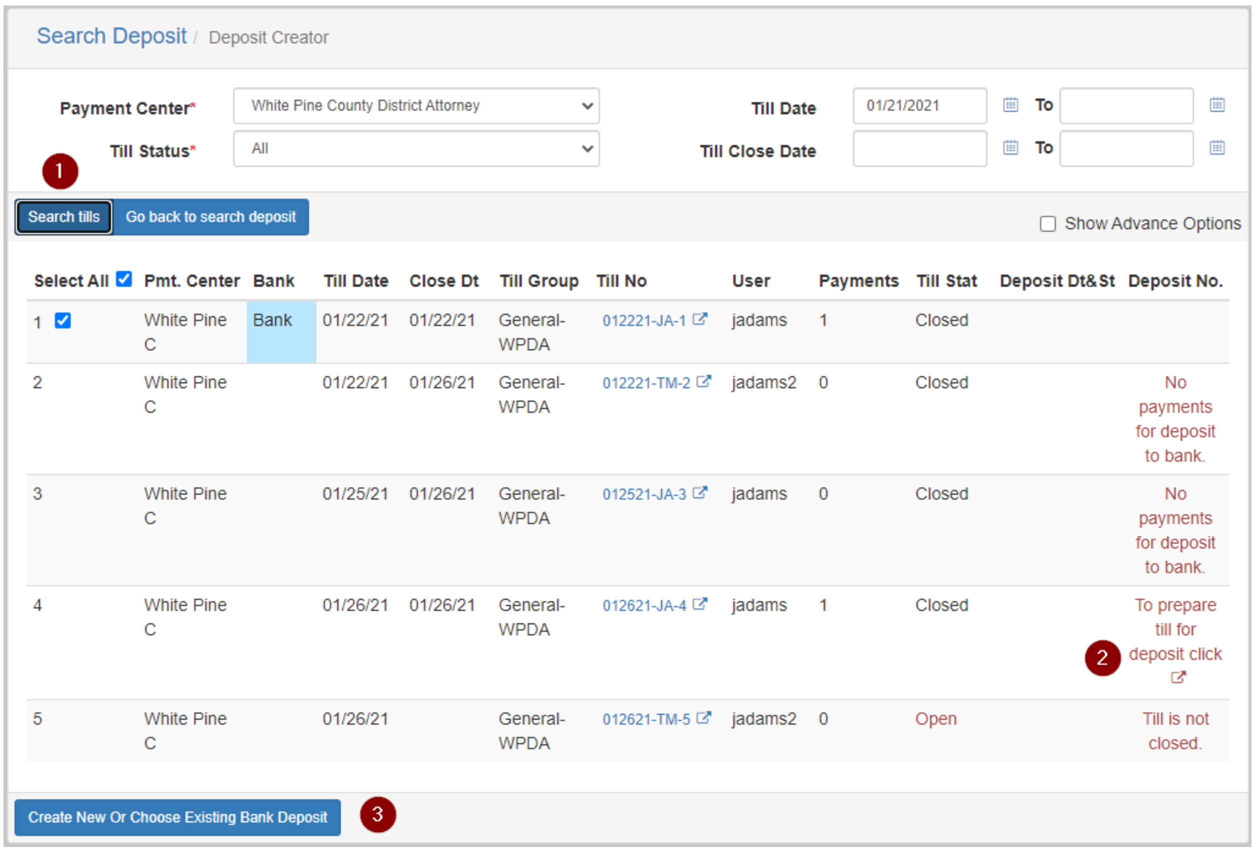
Create a deposit

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.



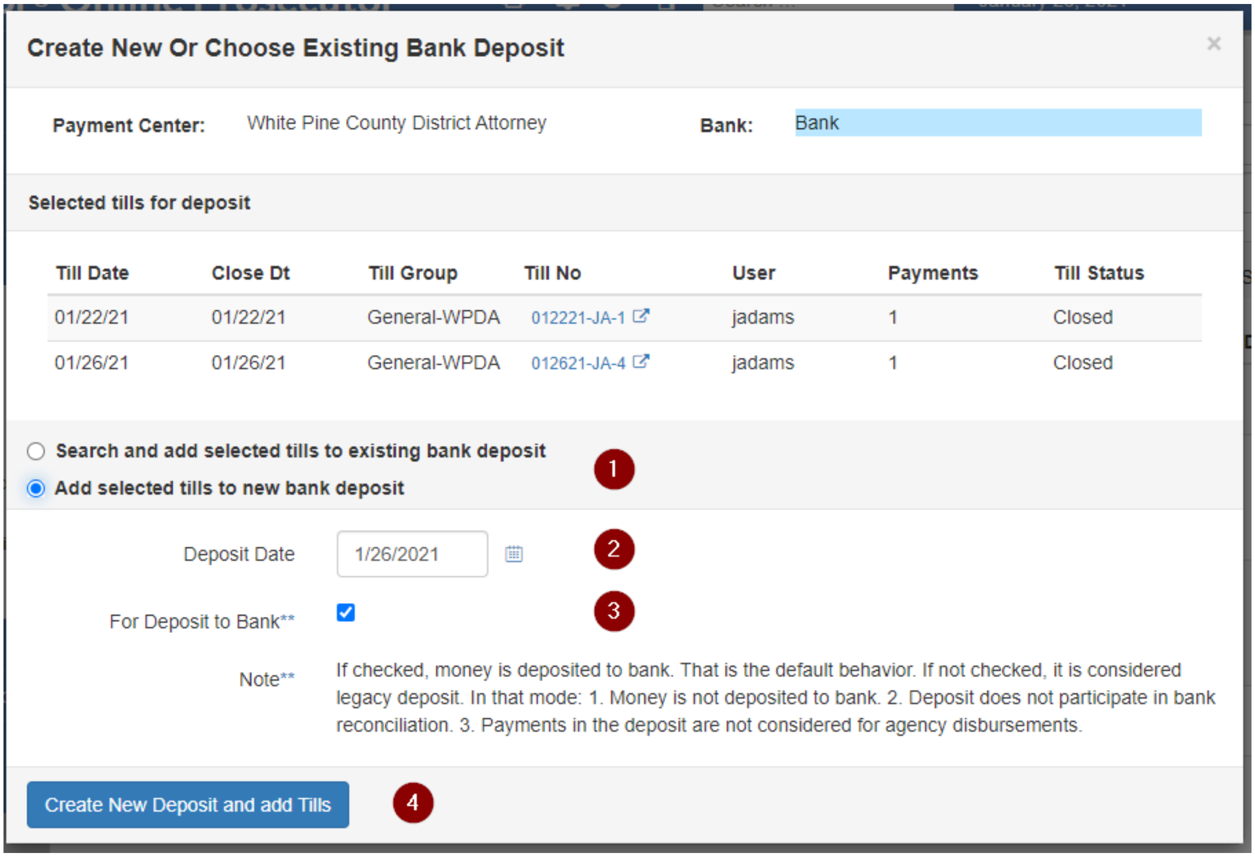
To add the tills to the **Deposit**, follow these steps:

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**.

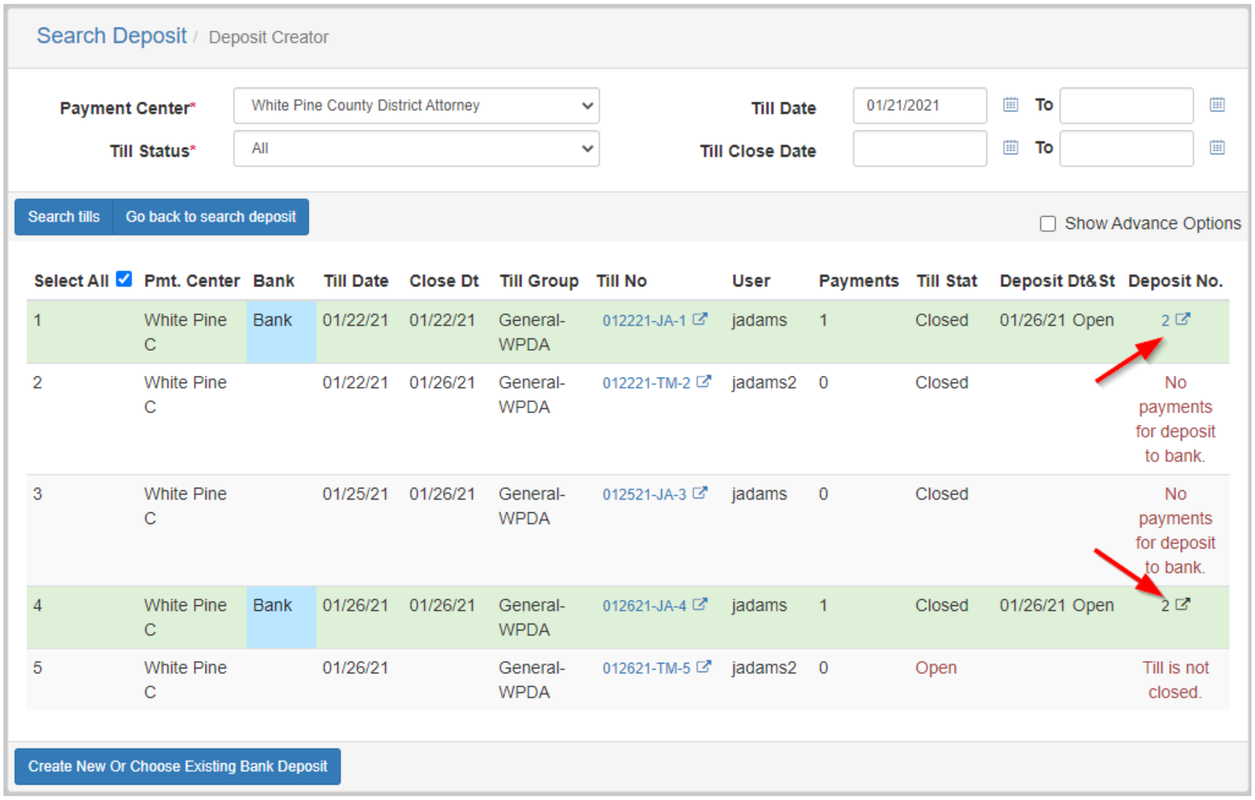
After selecting the tills you want to add to the deposit, you can then choose to add the tills to an existing **Deposit** record, or create a new deposit. The following screenshot shows how to create a new deposit:



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

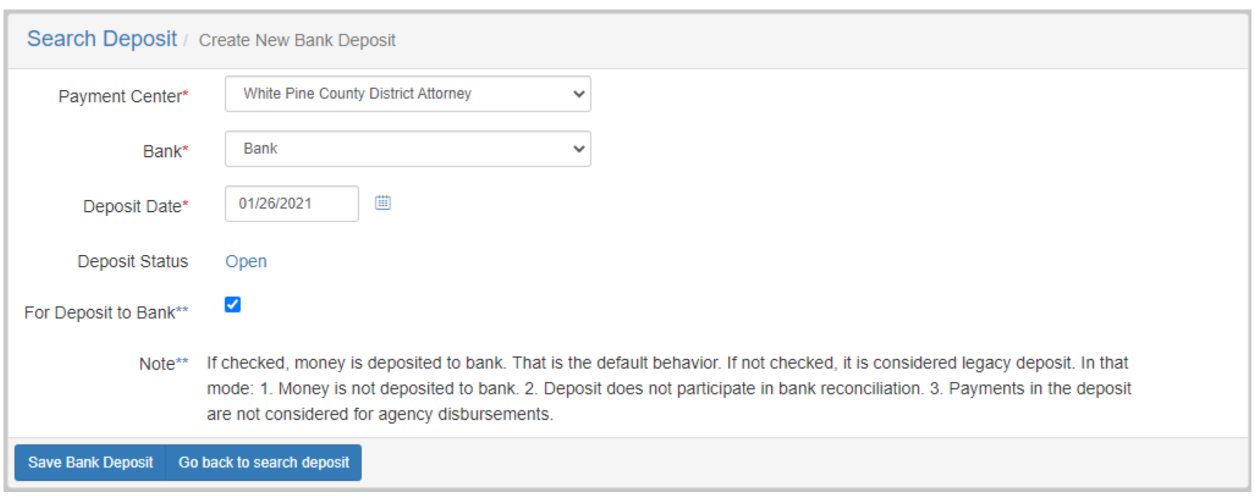
1. Select **Add selected tills to new bank deposit**.
2. Select the **Deposit Date**.
3. If the **Deposit** should participate in bank reconciliation, select **For Deposit to Bank**.
4. Click **[Create New Deposit and add Tills]** to create the **Deposit** record.

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:



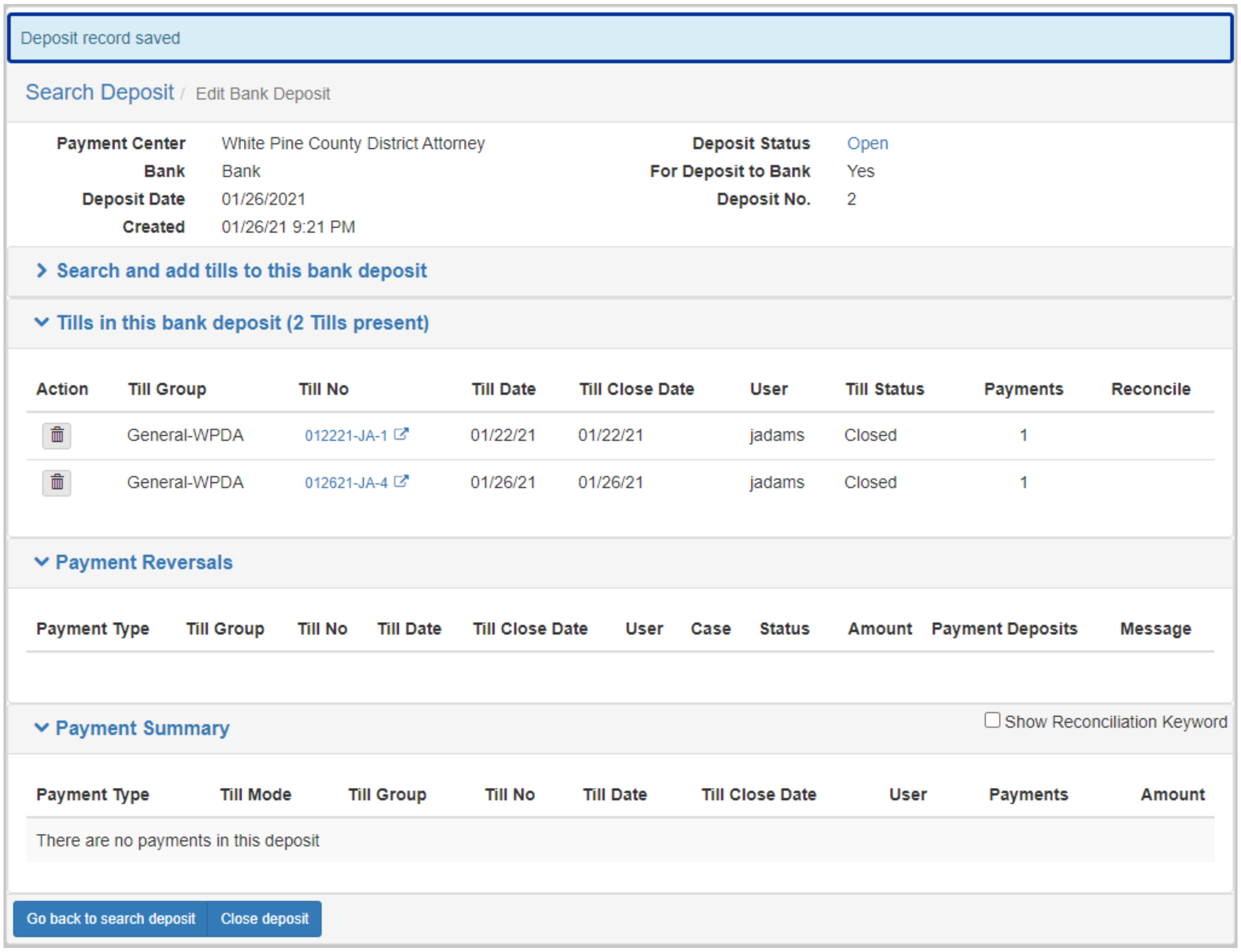
Option 2: create deposit manually

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.

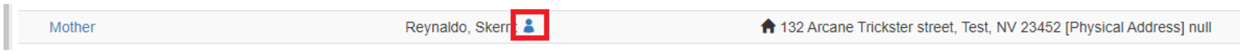
Directory person

In eProsecutor Online, 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 eProsecutor Online, a **Directory Person** is indicated by a double person icon:

A **Person** is indicated by a single person icon.

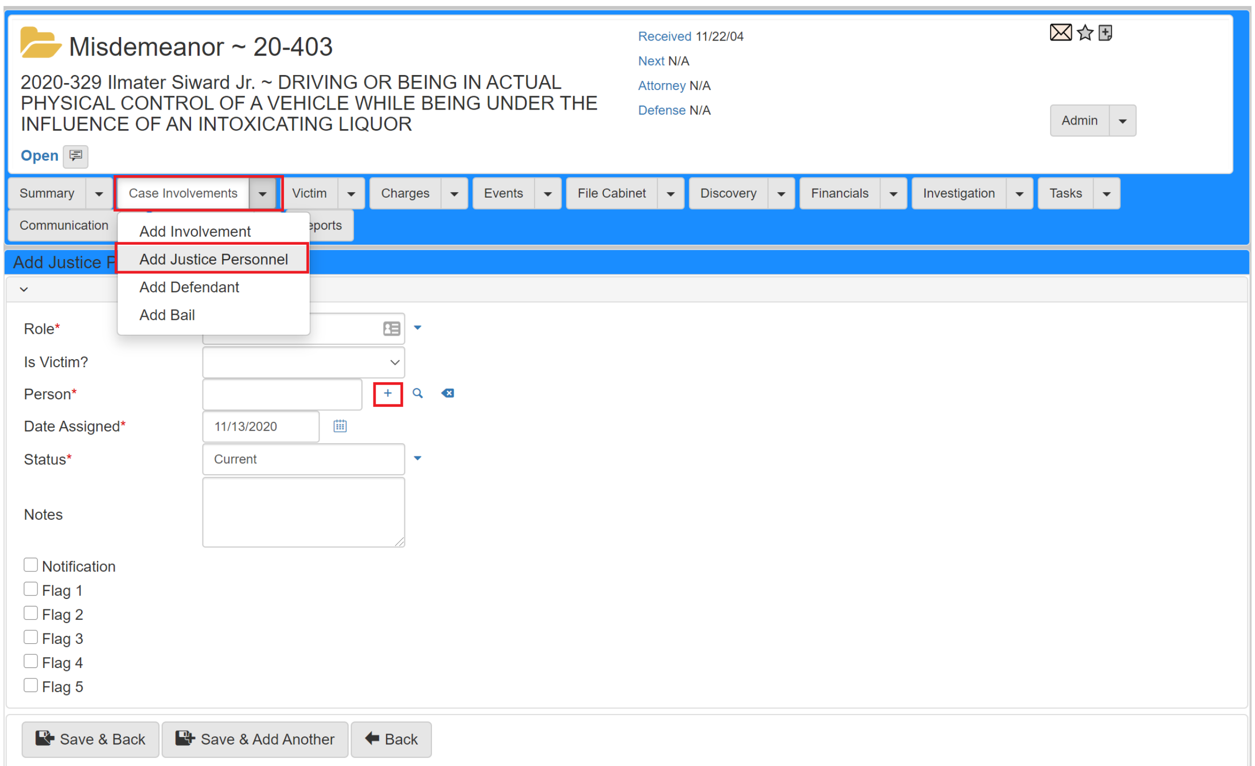


A **Directory Person** can also be assigned to cases. If a **Directory Person** is assigned to a case, the case shows in the user work space where they can access details and tasks for the case.

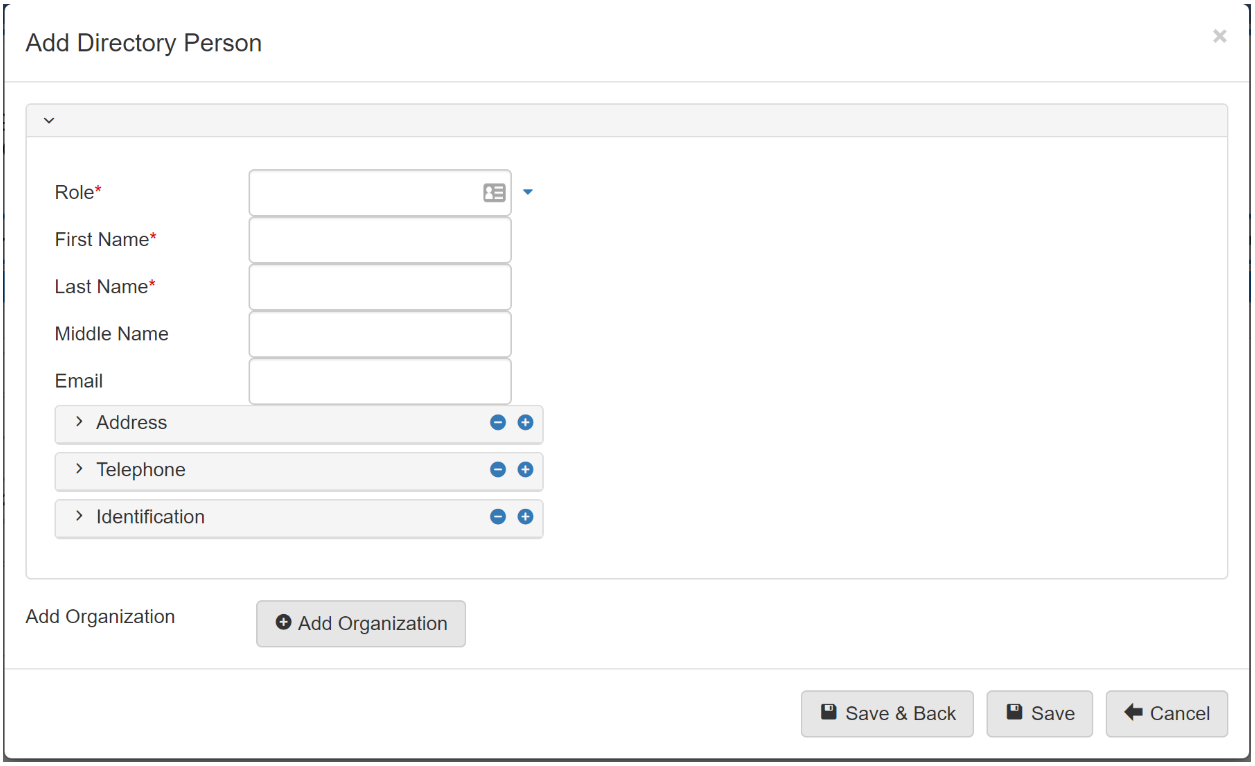
To access the **Directory Person Folder View**, click the double person icon on a case, or navigate to **Left navigation › Search › Search Justice Personnel**.

Create

A **Directory Person** can be created in the **Case View** by clicking the **Case Involvements** dropdown, then selecting **Add Justice Personnel**. Click **[+]** on the person field in the **Add Justice Personnel** screen:



A dialog opens where you can fill in the information required to save a **Directory Person**.



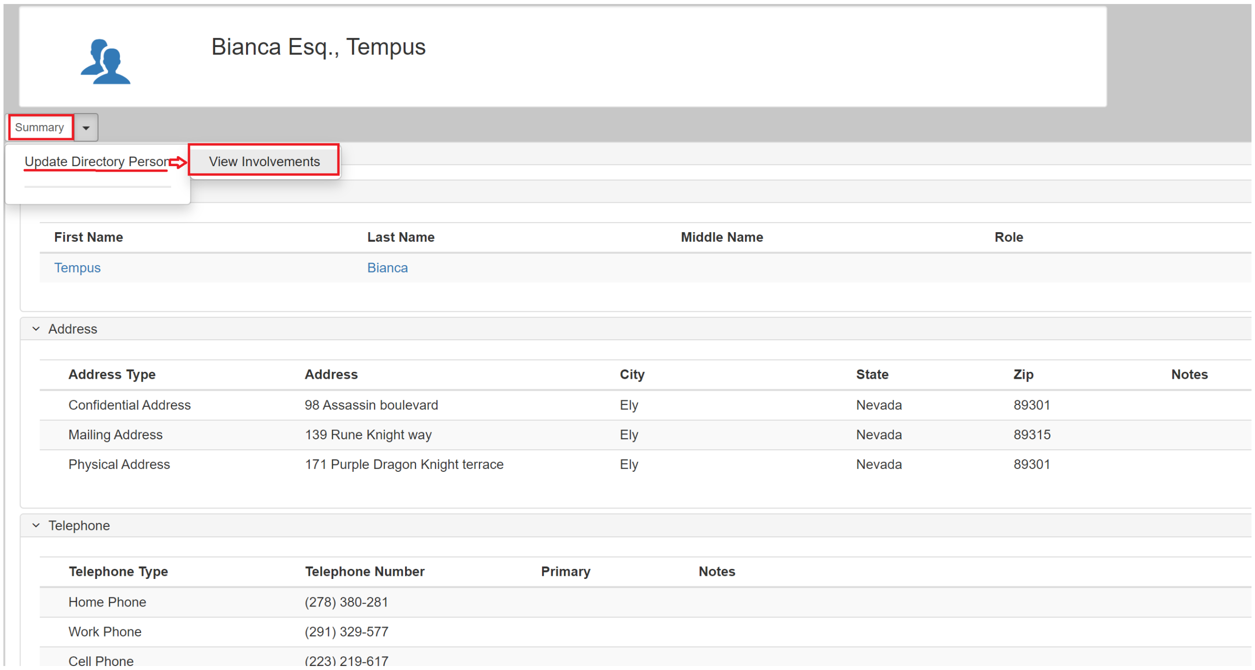
Update

To update a **Directory Person**, on the **Directory Person Folder View**, click the **Summary** dropdown, then select **Update Directory Person**.

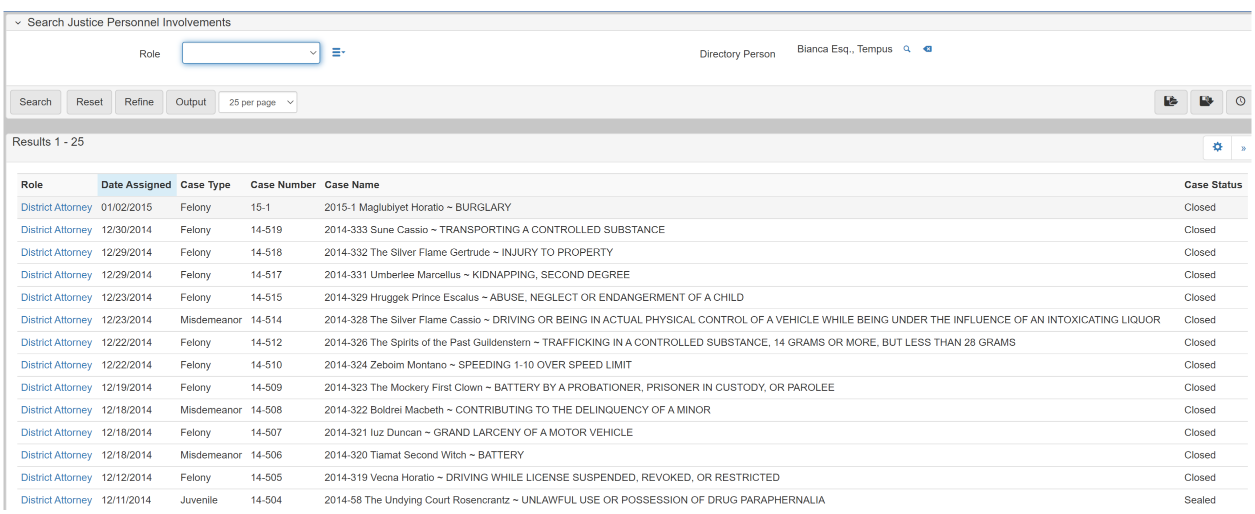
You are able to change roles, name, email, address, telephone, add files, add person to organizations, and take other actions.

Involvements

To view the **Involvements** for a **Directory Person**, on the **Directory Person Folder View** click the **Summary** dropdown, select **Update Directory Person**, then **View Involvements**.



The **View Involvements** screen shows the cases attached to the **Directory Person** including the **Role**, **Case Type**, **Case Number**, and **Case Status** columns.



Role	Date Assigned	Case Type	Case Number	Case Name	Case Status
District Attorney	01/02/2015	Felony	15-1	2015-1 Maglubiyet Horatio ~ BURGLARY	Closed
District Attorney	12/30/2014	Felony	14-519	2014-333 Sune Cassio ~ TRANSPORTING A CONTROLLED SUBSTANCE	Closed
District Attorney	12/29/2014	Felony	14-518	2014-332 The Silver Flame Gertrude ~ INJURY TO PROPERTY	Closed
District Attorney	12/29/2014	Felony	14-517	2014-331 Umberlee Marcellus ~ KIDNAPPING, SECOND DEGREE	Closed
District Attorney	12/23/2014	Felony	14-515	2014-329 Hruggek Prince Escalus ~ ABUSE, NEGLECT OR ENDANGERMENT OF A CHILD	Closed
District Attorney	12/23/2014	Misdemeanor	14-514	2014-328 The Silver Flame Cassio ~ DRIVING OR BEING IN ACTUAL PHYSICAL CONTROL OF A VEHICLE WHILE BEING UNDER THE INFLUENCE OF AN INTOXICATING LIQUOR	Closed
District Attorney	12/22/2014	Felony	14-512	2014-326 The Spirits of the Past Guildenstern ~ TRAFFICKING IN A CONTROLLED SUBSTANCE, 14 GRAMS OR MORE, BUT LESS THAN 28 GRAMS	Closed
District Attorney	12/22/2014	Felony	14-510	2014-324 Zeboim Montano ~ SPEEDING 1-10 OVER SPEED LIMIT	Closed
District Attorney	12/19/2014	Felony	14-509	2014-323 The Mockery First Clown ~ BATTERY BY A PROBATIONER, PRISONER IN CUSTODY, OR PAROLEE	Closed
District Attorney	12/18/2014	Misdemeanor	14-508	2014-322 Boldrei Macbeth ~ CONTRIBUTING TO THE DELINQUENCY OF A MINOR	Closed
District Attorney	12/18/2014	Felony	14-507	2014-321 Iuz Duncan ~ GRAND LARCENY OF A MOTOR VEHICLE	Closed
District Attorney	12/18/2014	Misdemeanor	14-506	2014-320 Tiamat Second Witch ~ BATTERY	Closed
District Attorney	12/12/2014	Felony	14-505	2014-319 Vecna Horatio ~ DRIVING WHILE LICENSE SUSPENDED, REVOKED, OR RESTRICTED	Closed
District Attorney	12/11/2014	Juvenile	14-504	2014-58 The Undying Court Rosencrantz ~ UNLAWFUL USE OR POSSESSION OF DRUG PARAPHERNALIA	Sealed

Tools

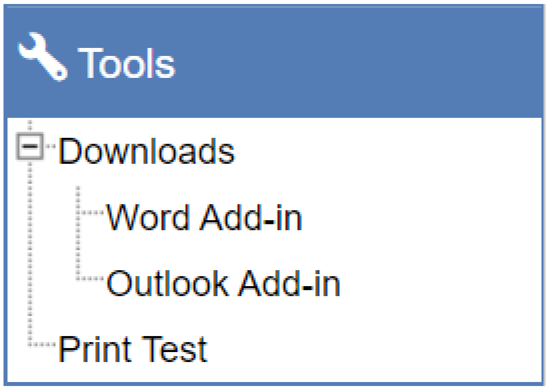
This section describes available tools:

- https://documentation.journaltech.com/eProsecutorOnline/user/tools/downloads.html.
- https://documentation.journaltech.com/eProsecutorOnline/user/tools/print_test.html.

Downloads

eProsecutor Online has the following two add-ins for Microsoft products that you can download and install:

To access the add-ins, navigate to **Left navigation › Tools › Downloads** and select **Word Add-in** or **Outlook Add-in**.

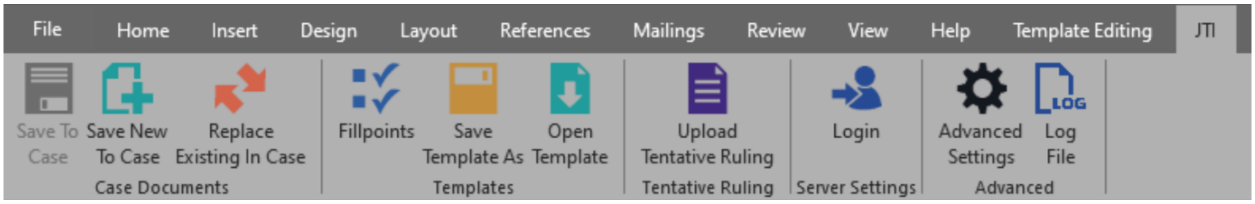


Word add-in

Use the Word add-in to:

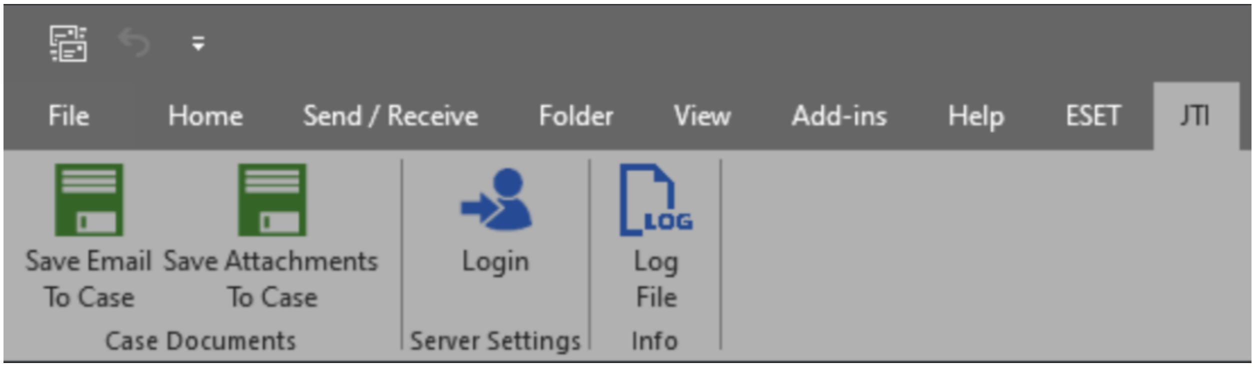
1. Uploads documents to cases, which adds new cases or overwrite existing cases.
2. Open, create, and save RTF templates using the **Template Fields** defined in eProsecutor Online.
3. Create and update tentative rulings.

These options show in the JTI section of the Word ribbon:

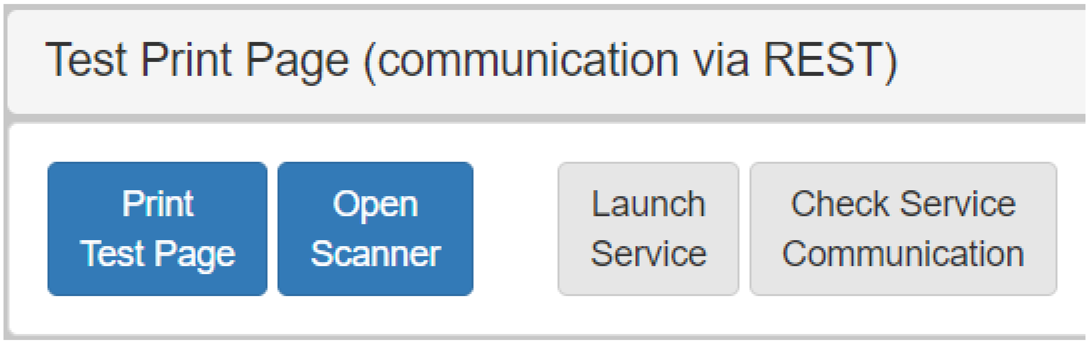


Outlook add-in

Use the Outlook add-in to save an email and/or its attachments to a **Case**. These options show in the JTI section of the Outlook ribbon:



Print test



The eProsecutor Online includes a background scan and print service that runs on the client machine. The service can print to a user-local printer and scan and save a document in a user-local scanner. After launching the service, it waits for print or scan requests and takes action when they arrive.

Requirements

eProsecutor Online now uses Java 17. In Java 17, the JavaWebStart (`javaws`) application is deprecated and no longer included. The print and scan service now requires OpenWebStart to run.

Installing OpenWebStart

1. Download and install OpenWebStart [https://openwebstart.com/].

   During the setup process, ensure the checkbox is selected to mark it as the default for JNLP files. An unattended install method is also available. For more details, refer to the OpenWebStart documentation [https://openwebstart.com/docs/OWSGuide.html#

_unattended_installation/].

2. Open the OpenWebStart settings app, `itw-settings.exe` in the install location, or it should be in the Start Menu as OpenWebStart or similar).
3. Check that all settings apply to your deployment environment.

   For example, verify the "auto updates" setting.

4. If you have eSeries Java services with the **Startup type** set to **Automatic**, for example, a service with a command like:

   ```
   javaws -Xnosplash http://your.environment/document/ec-service.jsp
   ```

   Those startup tasks must be updated to use the `javaws.exe` in the OpenWebStart install location.

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, the **eC** icon should show in the user system tray:

Some modern browsers, including Google Chrome, Mozilla Firefox, and Microsoft Edge, no longer support running Java applets in the browser. For those users running a modern browser, start the service with a startup task. Run the following command in a terminal window:

Template command does not work without modification:

```
javaws -Xnosplash http://<server:port>/document/ec-service.jsp
```

Replace `<server:port>` with the server and port where the eProsecutor Online is running.

Example:

```
javaws -Xnosplash https://epo-symphony.journaltech.cloud/document/ec-service.jsp
```

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 printing a 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 Launch Service). 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 eProsecutor Online.

> The print and scan service should only launch once.

If the service launches each time users try to print, 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 eProsecutor Online app server. The eProsecutor Online app server tries to access the scan service on the client machine. The network settings must be set up correctly for the eProsecutor Online service to run fast / correctly. By default, these requests come from the eProsecutor Online server to the client machine port 8383. This port must not be blocked on the user firewall. Usually, this port is not blocked for local network traffic.

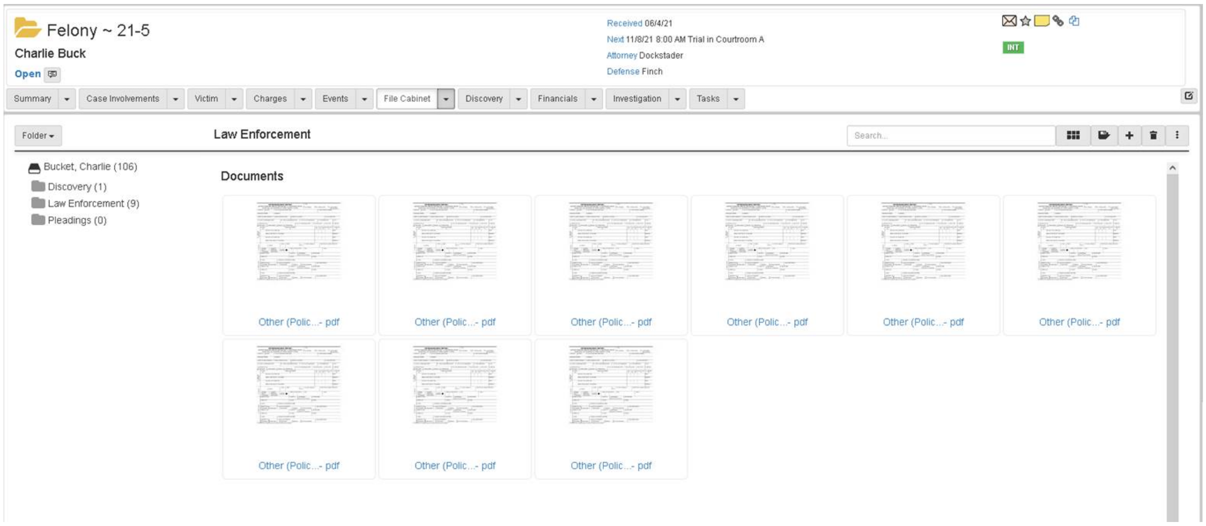
In addition, if the eProsecutor Online server is not a local server but a hosted or remote server, the router/firewall from the remote location must be allowed through.

3. Business processes guide

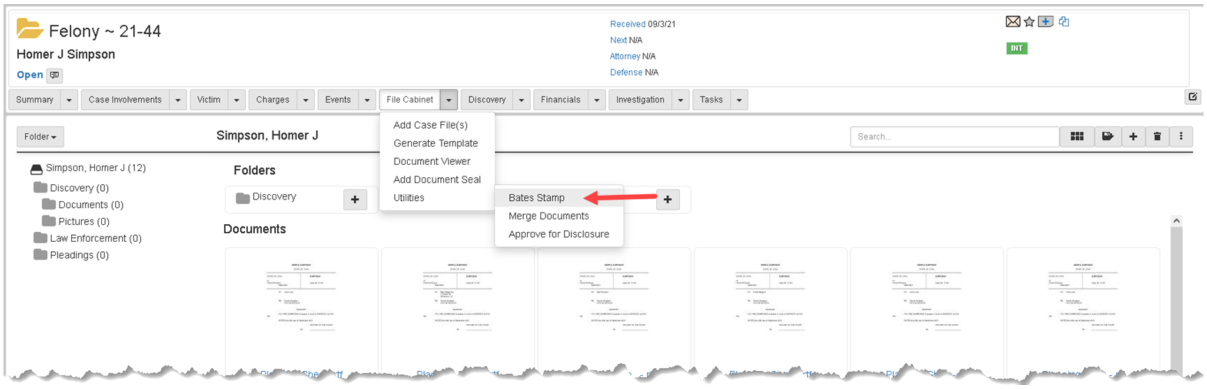
This section describes the business processes available in eProsecutor Online.

Bates stamping

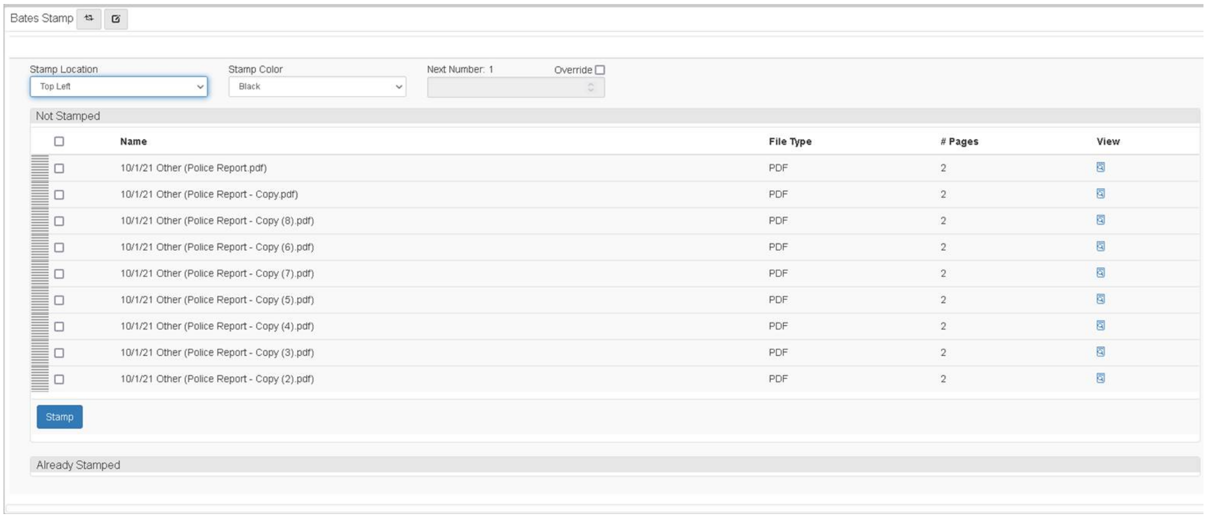
1. In the **File Cabinet Folder View**, click the dropdown:



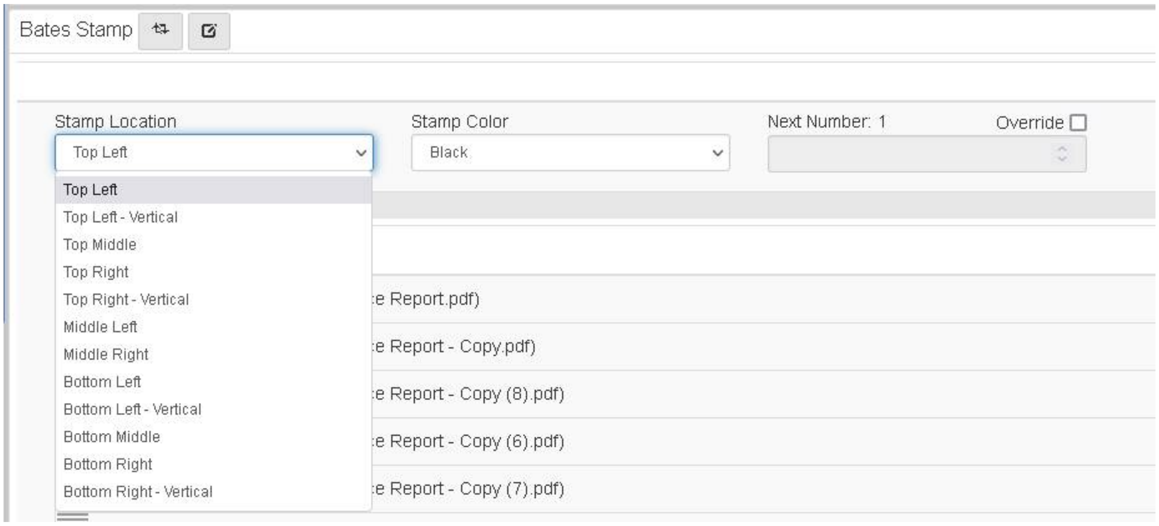
2. Hover over **Utilities** and click **Bates Stamp**. The **Bates Stamp** screen shows:



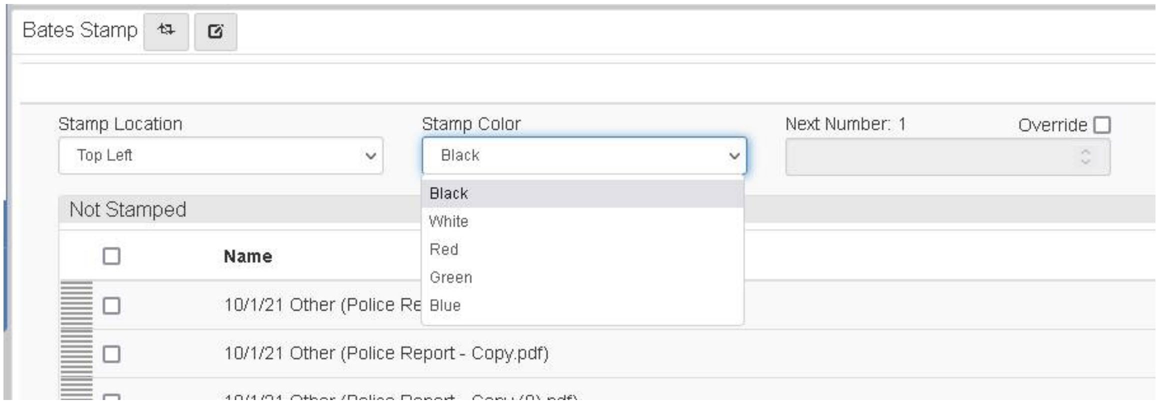
3. The **Bates Stamp** screen provides the following capabilities:



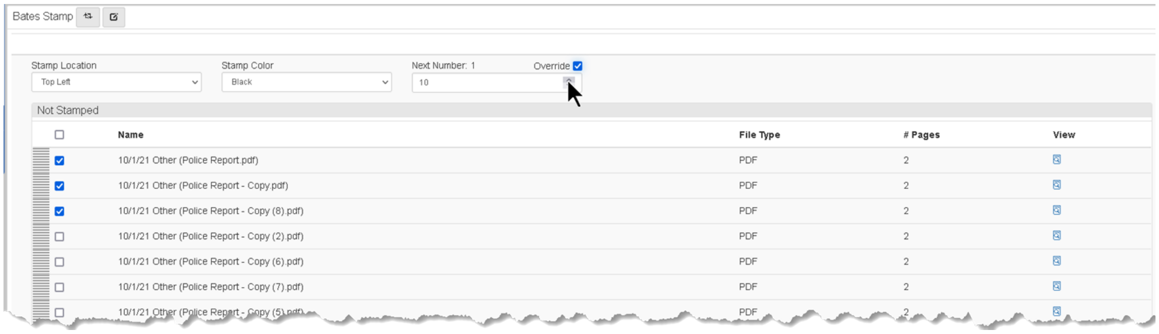
- Select **Stamp Location**:



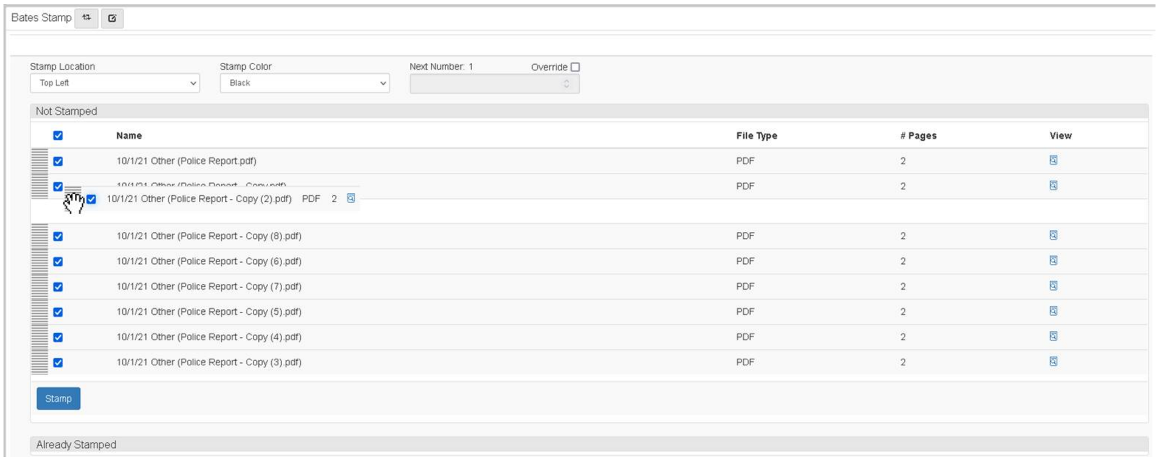
- Select **Stamp Color**:



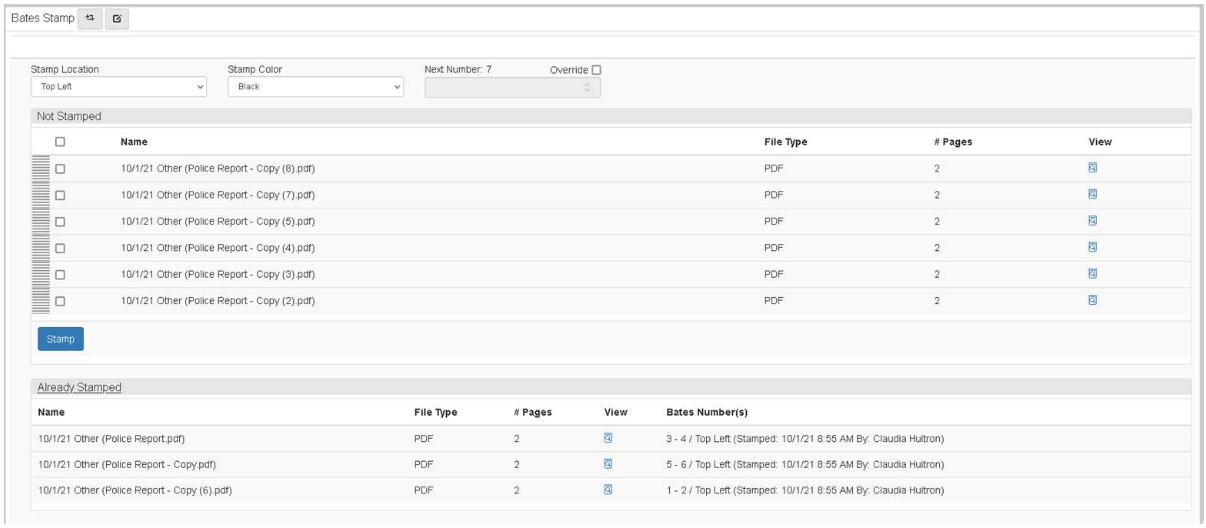
- Override the **Next Number**, if needed:



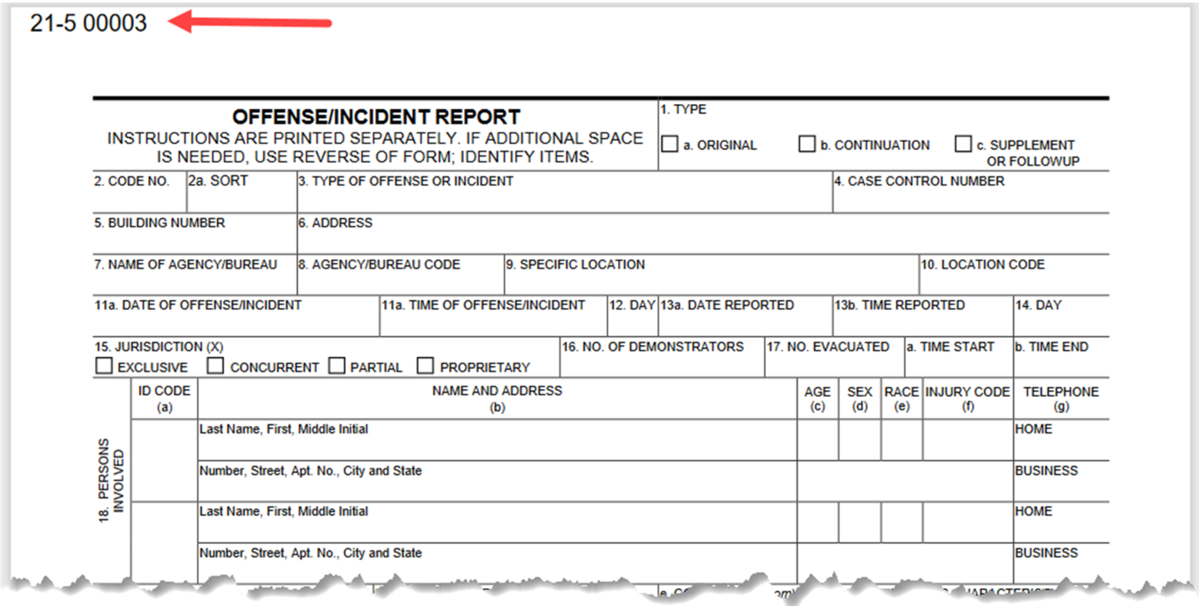
- Drag and drop the documents to order them accordingly:



4. Select some documents or all.
5. Once selected and ordered, click **[Stamp]**.
6. Once the documents are Bates 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

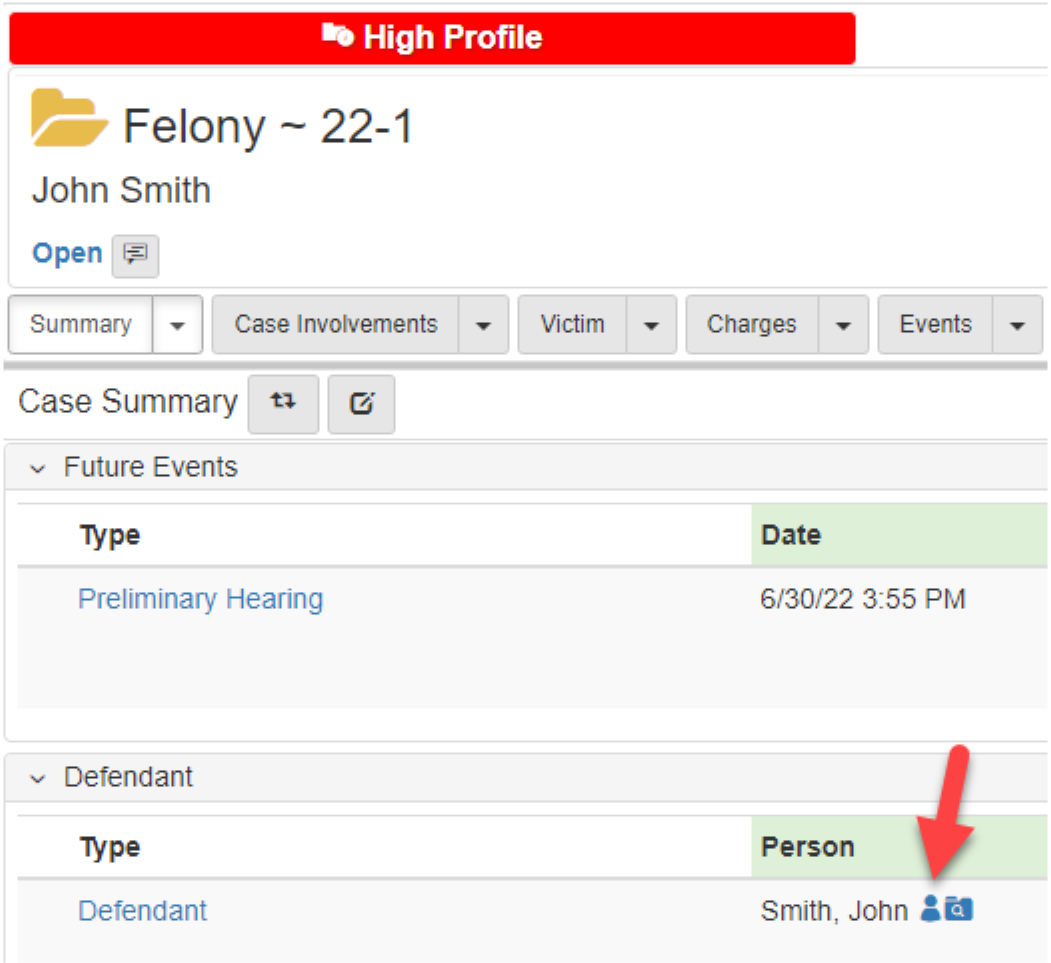
2. CODE NO.	2a. SORT	3. TYPE OF OFFENSE OR INCIDENT	4. CASE CONTROL NUMBER
5. BUILDING NUMBER	6. ADDRESS		
7. NAME OF AGENCY/BUREAU	8. AGENCY/BUREAU CODE	9. SPECIFIC LOCATION	10. LOCATION CODE
11a. DATE OF OFFENSE/INCIDENT	11a. TIME OF OFFENSE/INCIDENT	12. DAY	13a. DATE REPORTED
13b. TIME REPORTED	14. DAY		
15. JURISDICTION (X) ☐ EXCLUSIVE ☐ CONCURRENT ☐ PARTIAL ☐ PROPRIETARY	16. NO. OF DEMONSTRATORS	17. NO. EVACUATED	a. TIME START
b. TIME END			

18. PERSONS INVOLVED

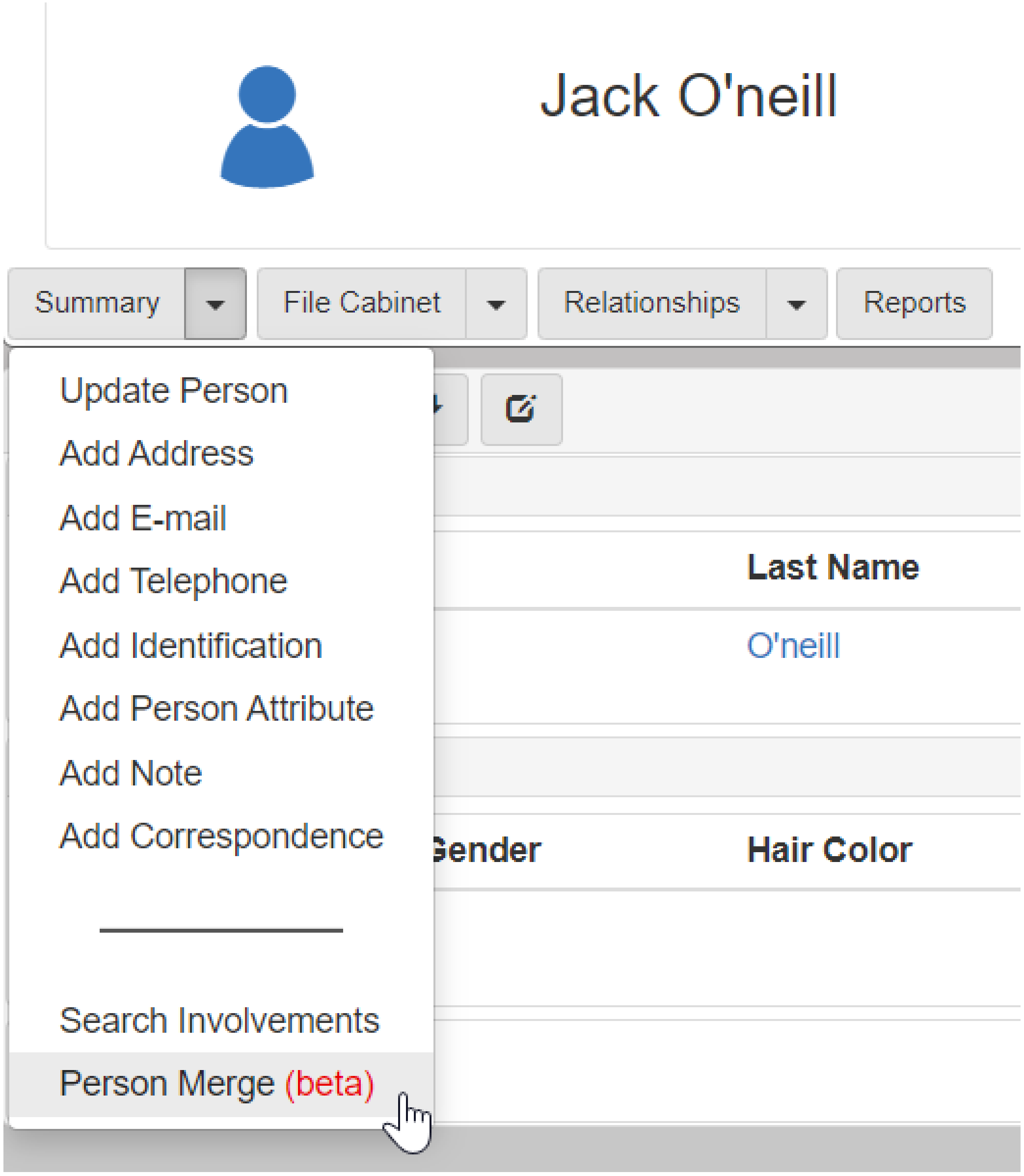
ID CODE (a)	NAME AND ADDRESS (b)	AGE (c)	SEX (d)	RACE (e)	INJURY CODE (f)	TELEPHONE (g)
	Last Name, First, Middle Initial					HOME
	Number, Street, Apt. No., City and State					BUSINESS
	Last Name, First, Middle Initial					HOME
	Number, Street, Apt. No., City and State					BUSINESS

Bulk merge

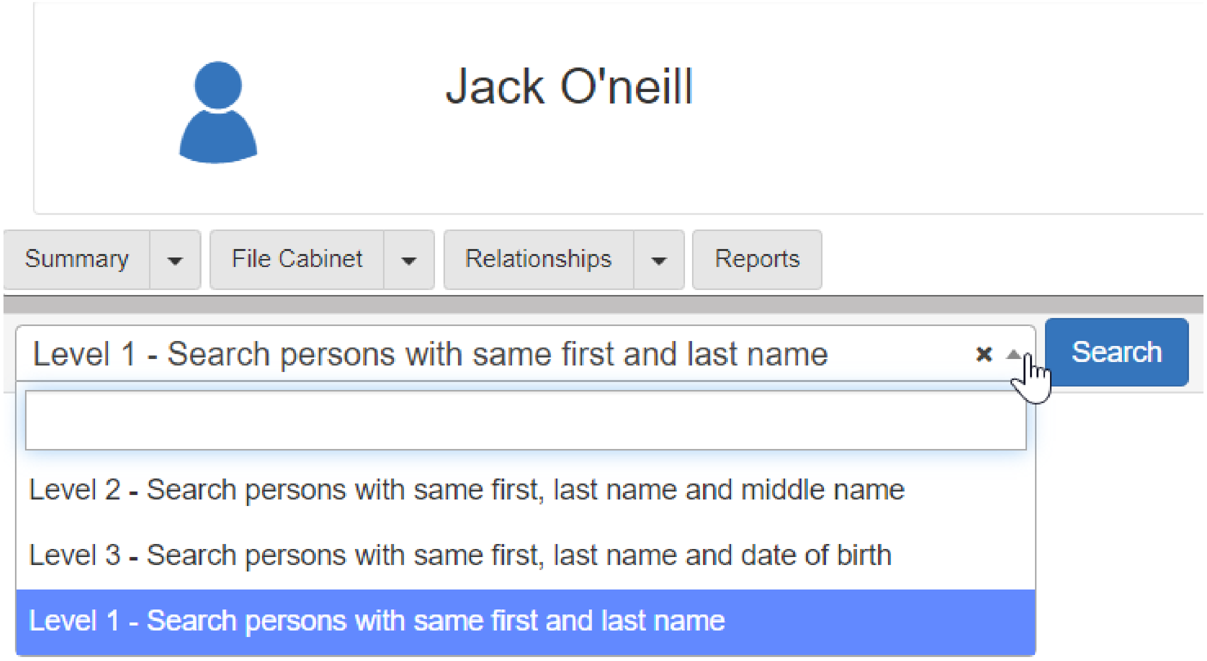
1. To start a bulk merge, click the **Open Person View** icon. The **Person Summary View** screen shows:



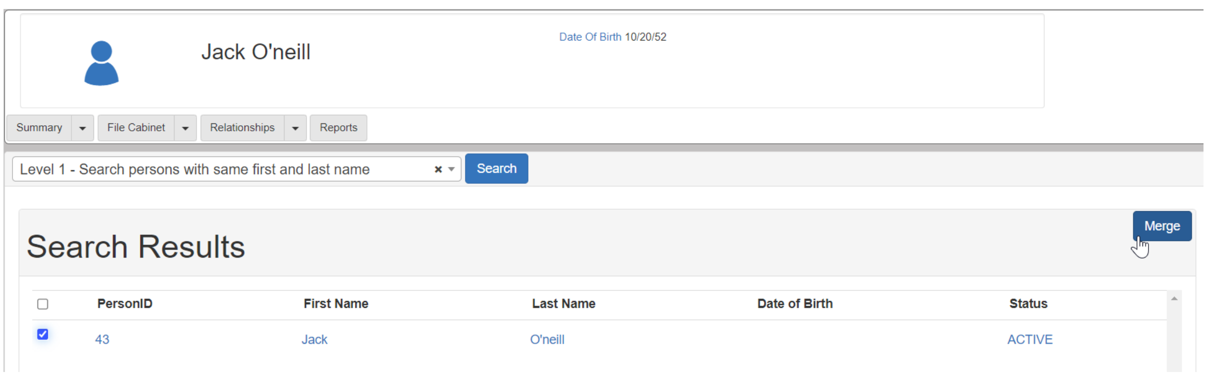
2. Click the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, click **Bulk Merge**:



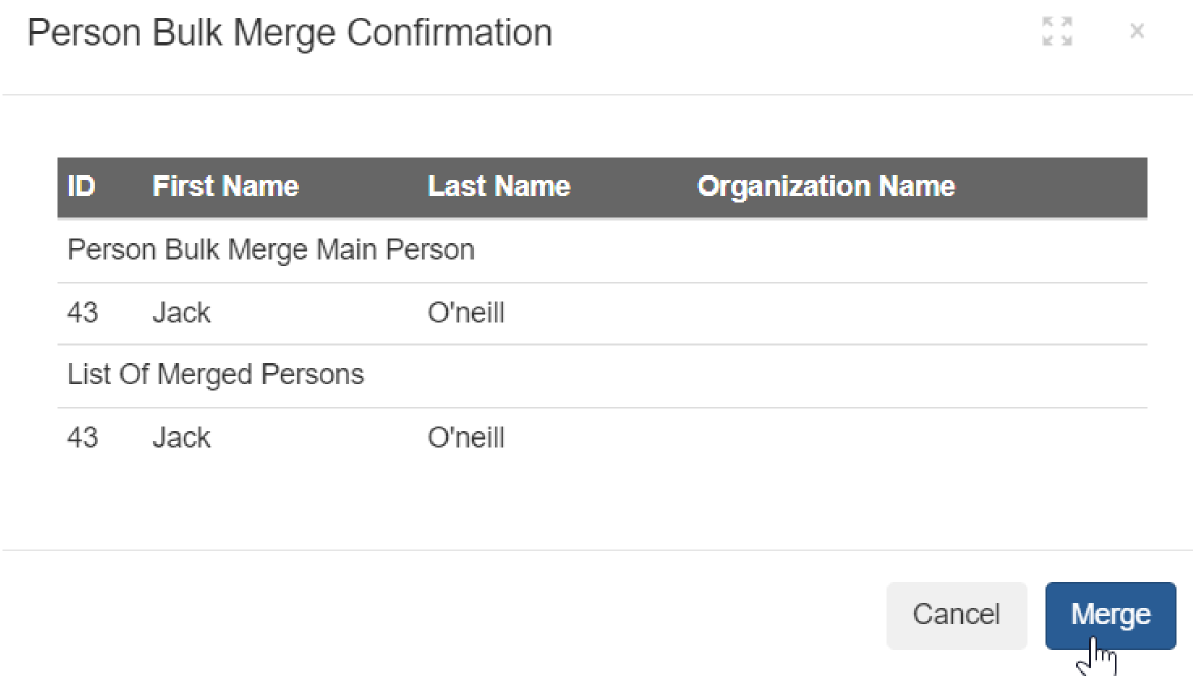
3. In the **Bulk Merge** search dropdown, select the search to execute:



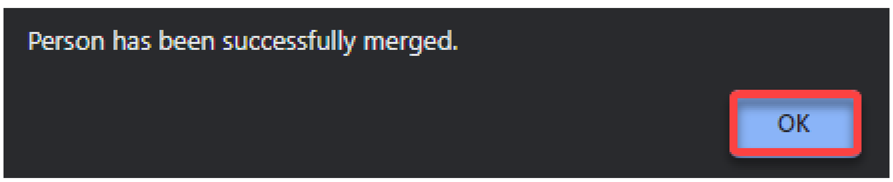
4. On the **Bulk Merge** search screen, select the checkbox next to the person record that needs to merge with the current person record.
5. Click **[Merge]**:



6. The **Person Bulk Merge Confirmation** dialog shows. Click **[Merge]**.



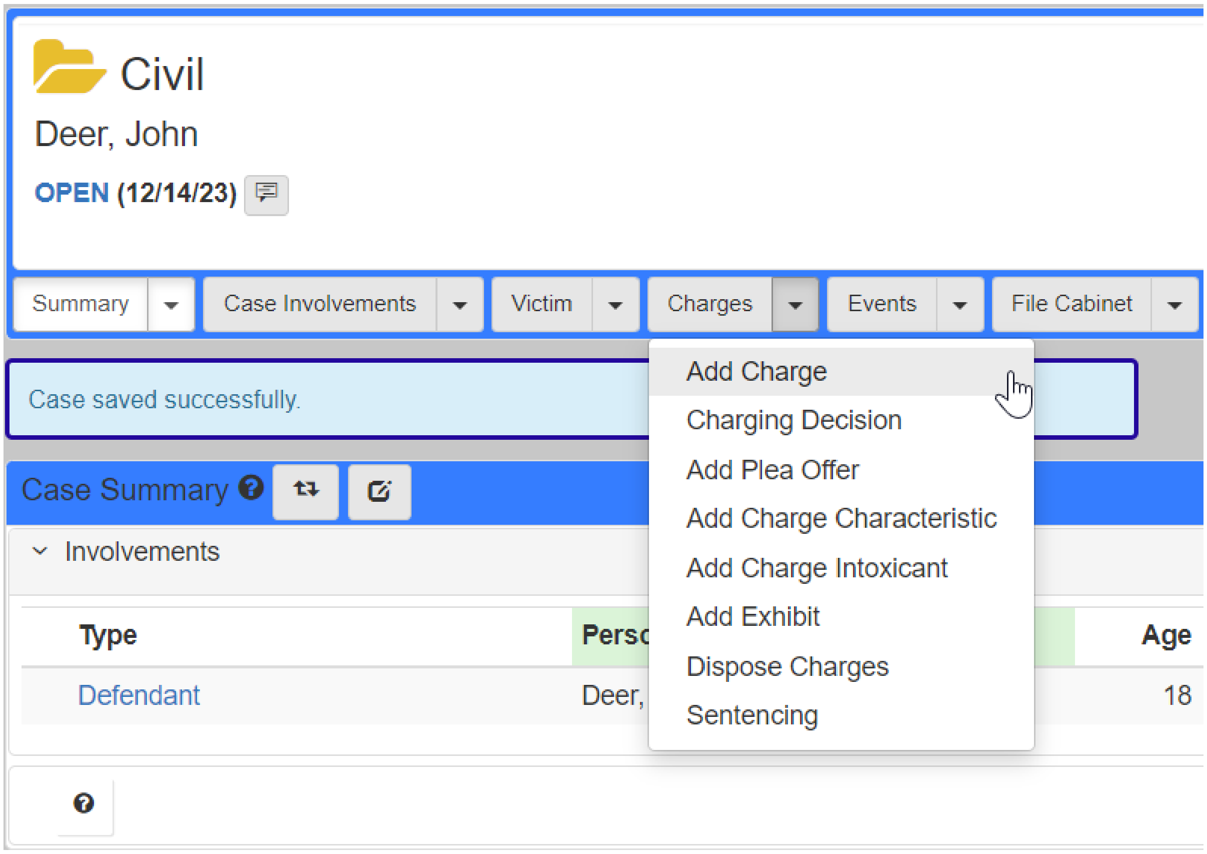
7. The following message shows: `Person has been successfully merged.`. Click **[OK]**.



Charging

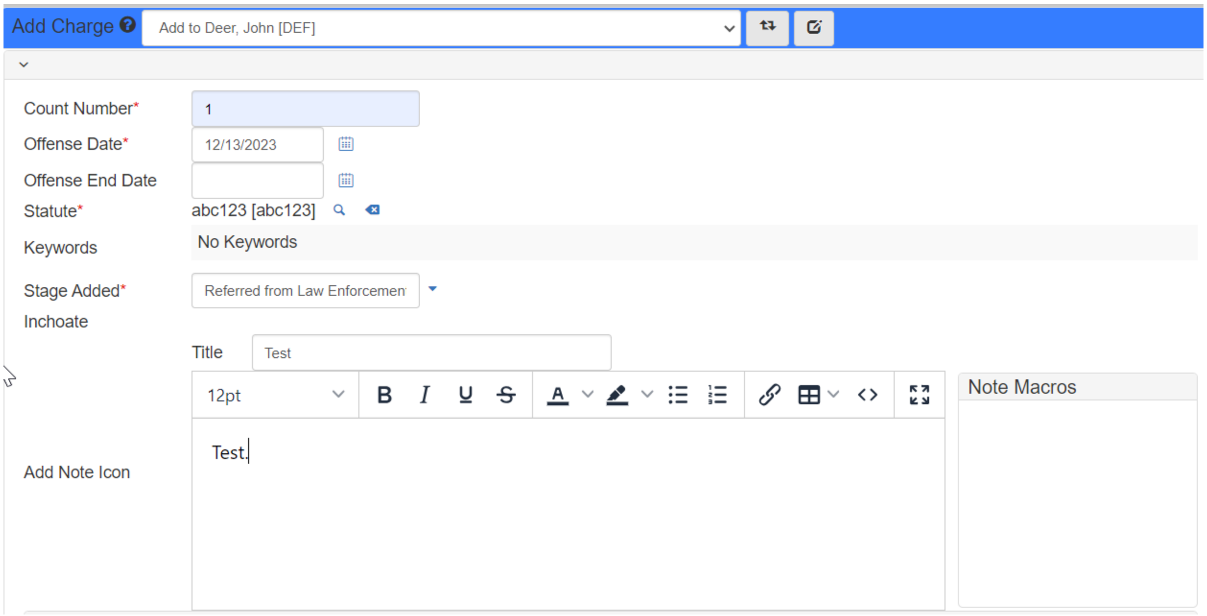
Charges folder view

- Use the **Charges** folder to manage charges, plea offers, sentencings, and more.

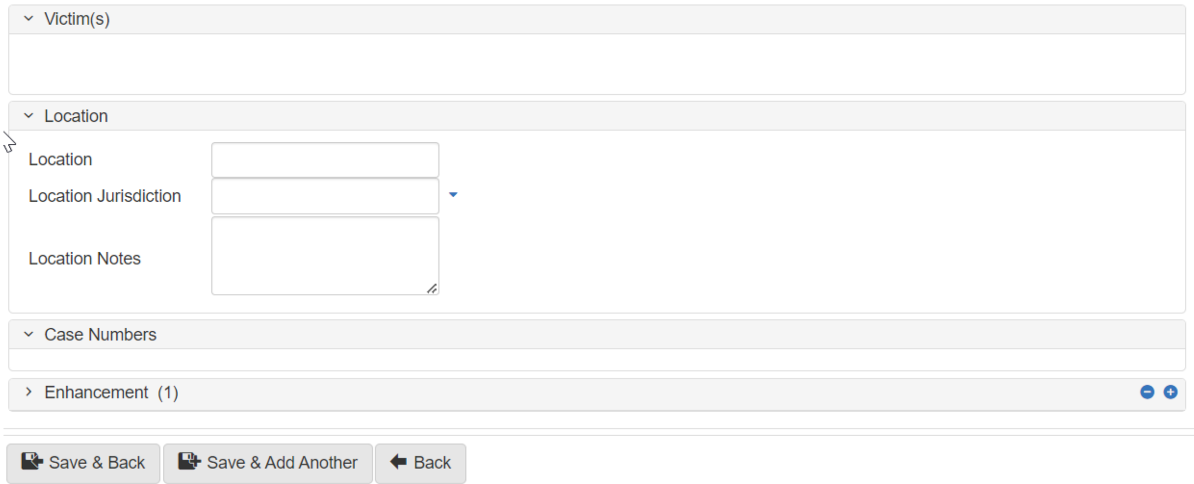


Add a charge

1. In the **Charges** dropdown, click **Add Charge**.
2. Add a information about the charge.



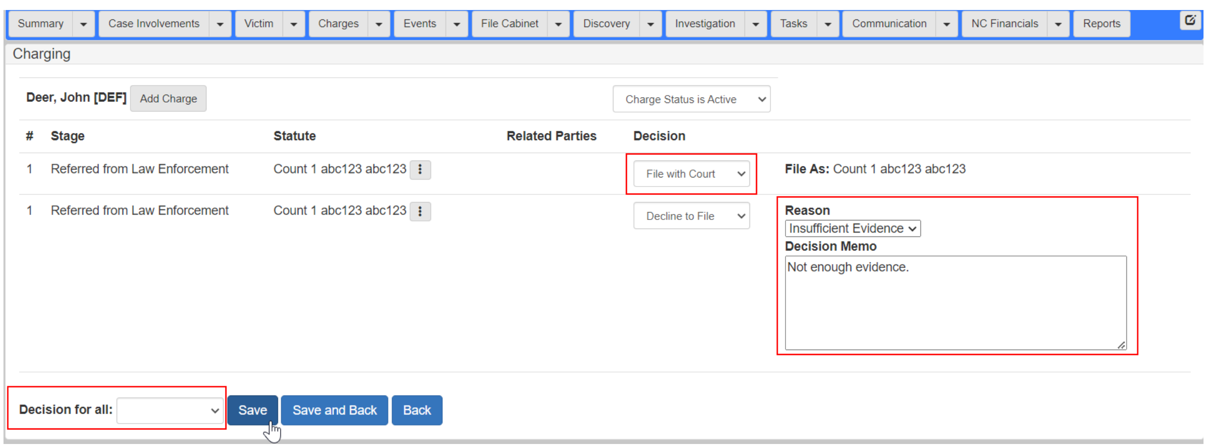
3. Add victims, location information, or other case numbers.



4. Click **[Save]**, **[Save and Back]**, or **[Back]**.

Charging decision

1. Click **[Charging Decision]** in the **Charges** tab.
2. Select a decision for each charge, select reasons if declining to file, and/or make bulk decisions for all changes.



3. Click **[Save]**, **[Save and Back]**, or **[Back]**.

When using the **Charging Decision** screen, an attorney must give a reason for using the **Decline to File** or **Replace Charge** options.

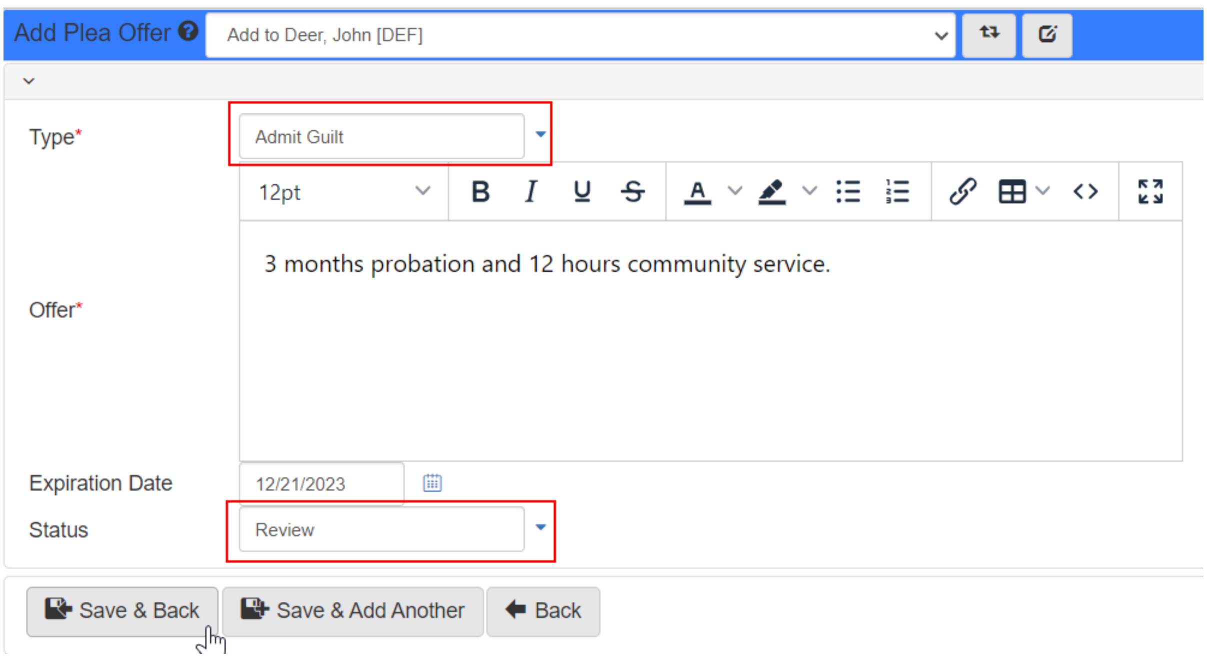
By default, the only reason available is **Insufficient Evidence**. **Super Users** can add more reasons through the **CHARGE_DISPOSITION_REASON** lookup list.

Find the lookup list by:

1. Navigate to **Left navigation › System Administration › Lookup Lists**.
2. Find the list with one of the following:
   a. Scroll to find the **CHARGE_DISPOSITION_REASON** lookup list.
   b. Search for the list: enter `CHARGE_DISPOSITION_REASON` in the **Name** field.
   c. Search for an item in **CHARGE_DISPOSITION_REASON** lookup list, then select **Search Item**.
3. Click the **CHARGE_DISPOSITION_REASON** link.
4. Add, update, or delete reasons as needed.
5. Click **[Save]**.

Add plea offer

1. Click **[Add Plea Offer]** in the **Charges** tab.
2. Select plea deal type, status, and add other information.



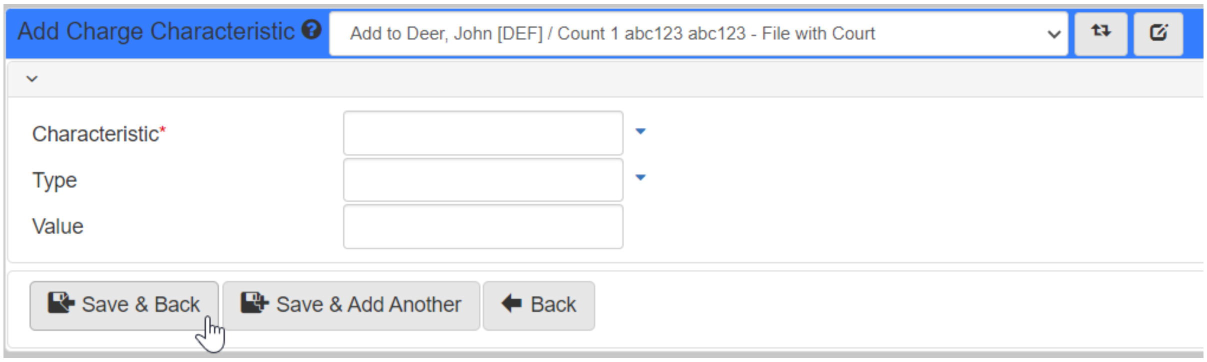
3. Click **[Save]**, **[Save and Back]**, or **[Back]**.

Add charge characteristic

1. Click **[Add Charge Characteristic]** in the **Charges** tab.

> One or more charges are required first before adding charge characteristics.

2. Add a characteristic, type, and a value.



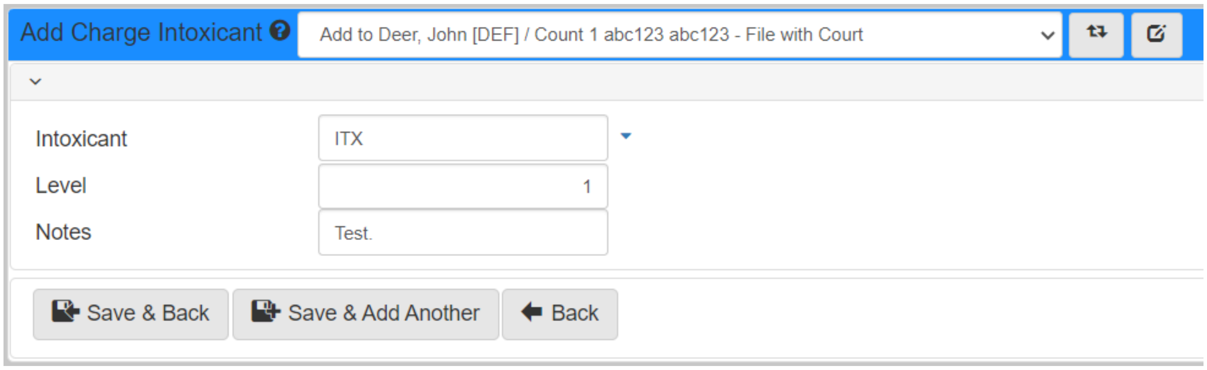
3. Click **[Save]**, **[Save and Back]**, or **[Back]**.

Add charge intoxicant

1. Click **[Add Charge Intoxicant]** in the **Charges** tab.

> One or more charges are required first before adding charge intoxicants.

2. Add an intoxicant, level, and a notes.



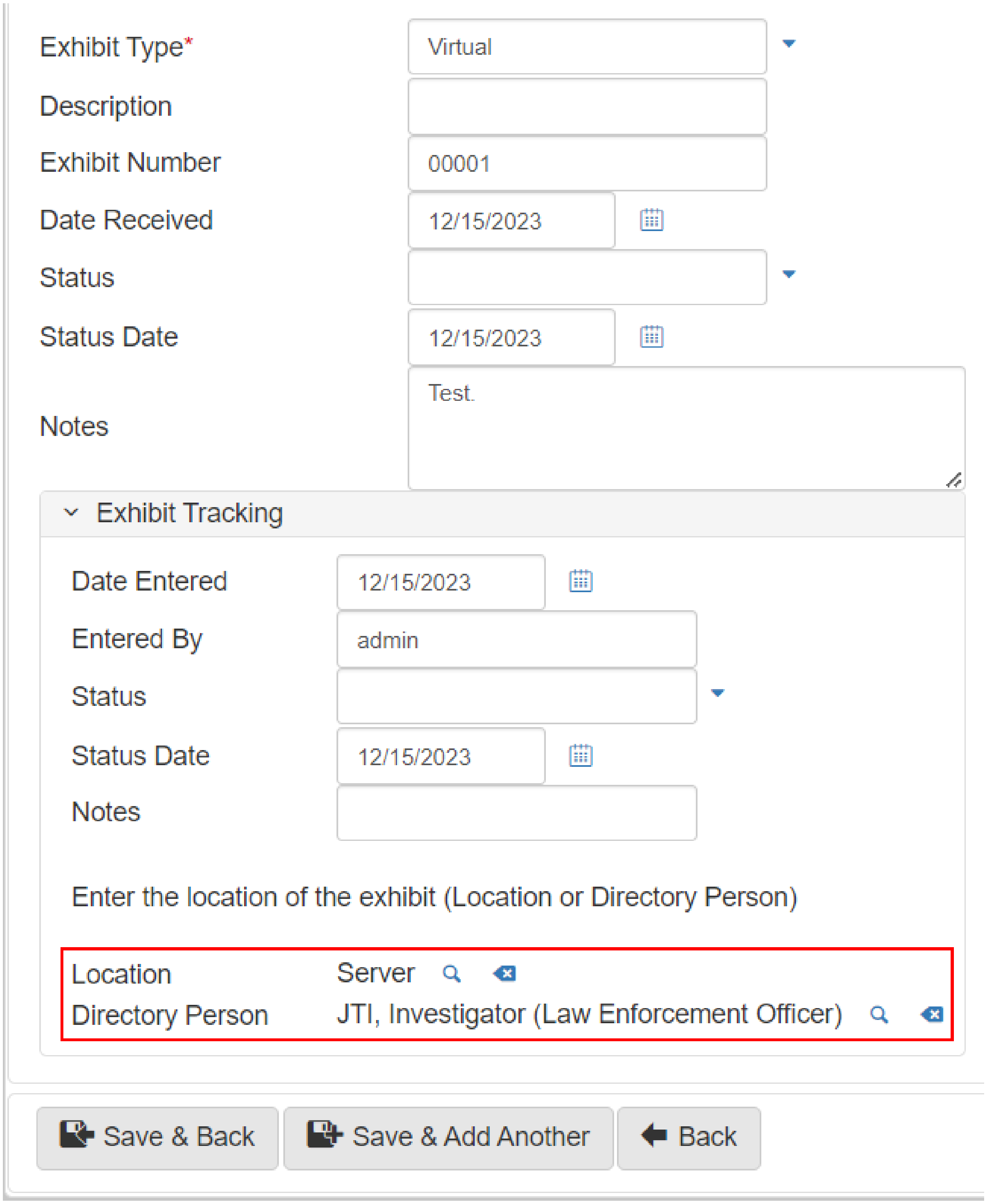
3. Click **[Save]**, **[Save and Back]**, or **[Back]**.

Add exhibit

1. Click **[Add Exhibit]** in the **Charges** tab.
2. Add the information.

Exhibit tracking

- A location and a directory person can be added to an exhibit.
- Locations can be added to organizations under the directory.

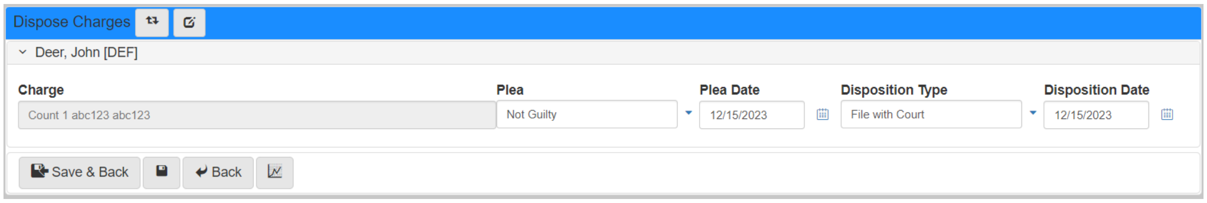


Dispose charges

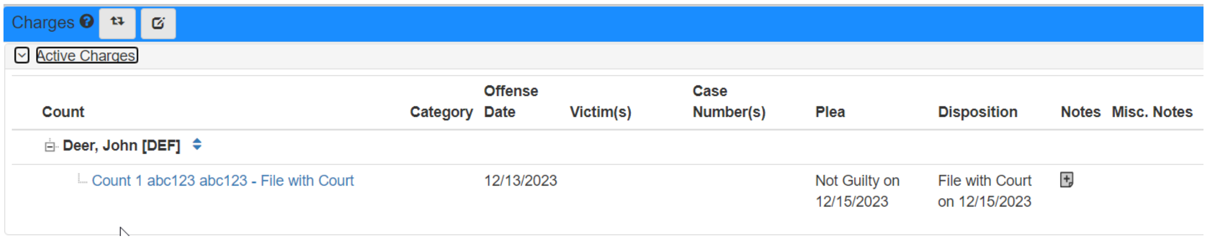
1. Click **[Dispose Charges]** in the **Charges** tab.

   One or more charges are required first before disposing a charge.

2. Select a charge, plea, plea date, disposition type, and a disposition date.
3. Click **[Save]**, **[Save and Back]**, or **[Back]**.

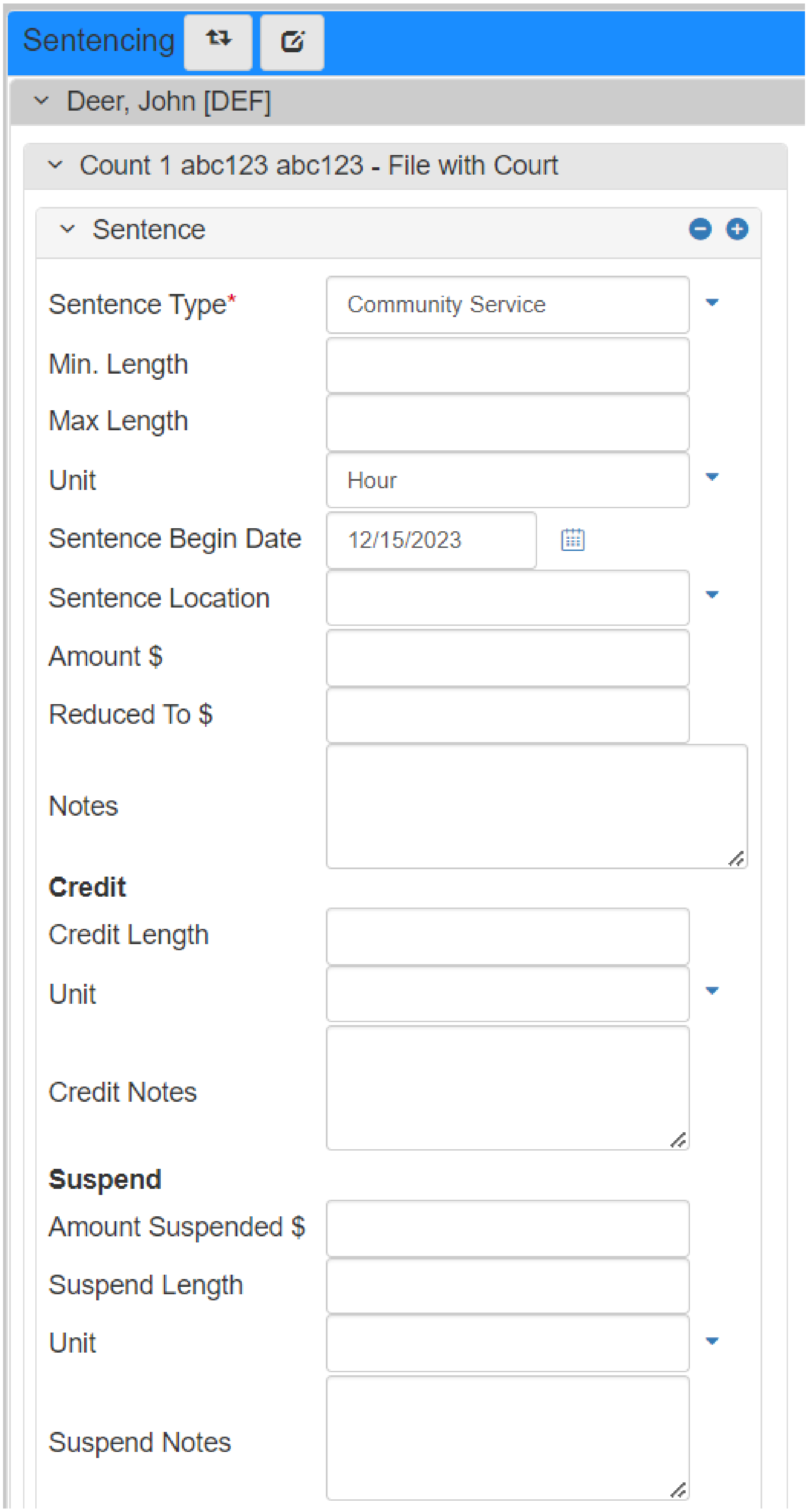


4. After saving, the charge can be viewed in the **Charges** tab.

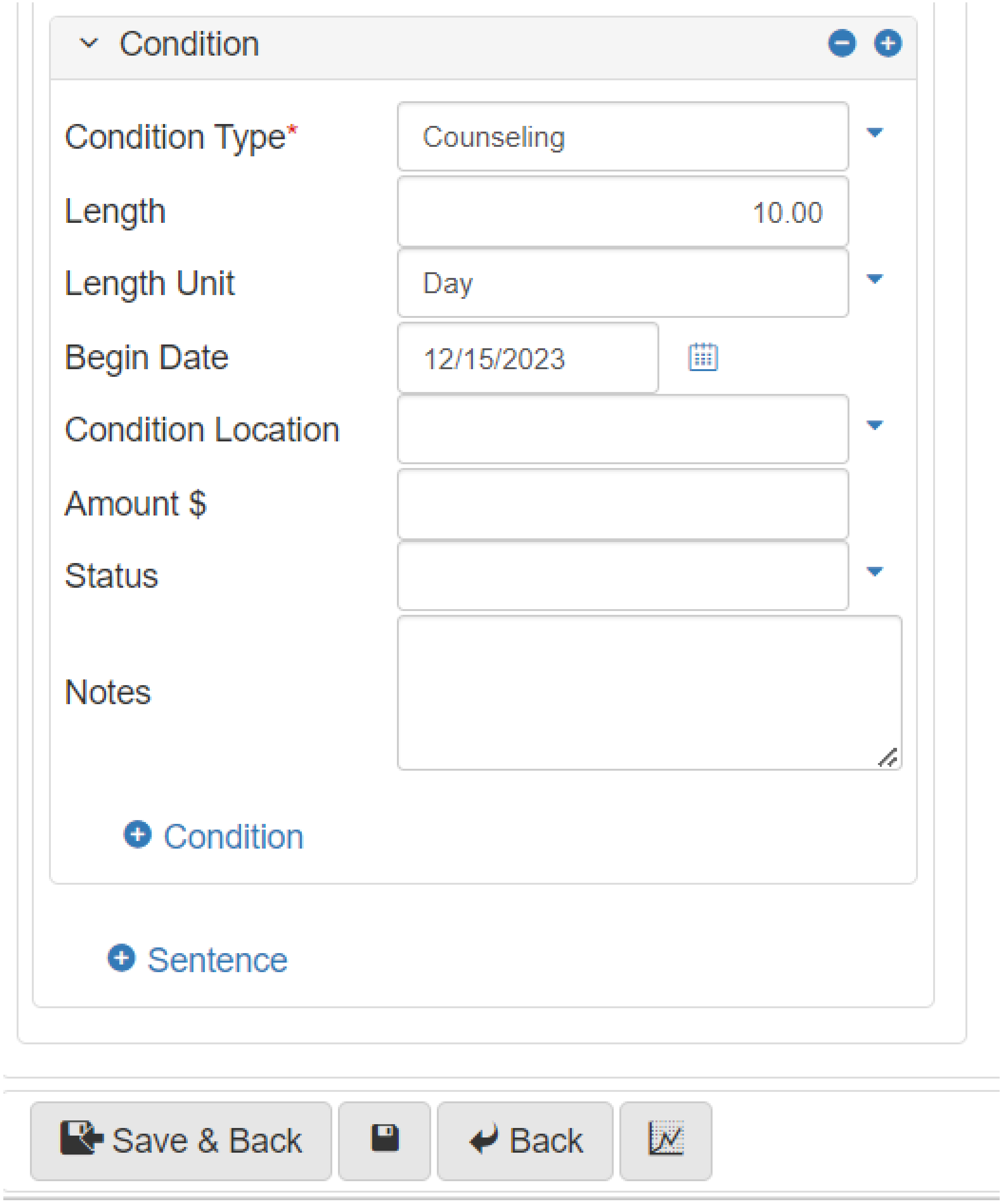


Sentencing

1. Click **[Sentencing]** in the **Charges** tab.
2. On a charge, add sentencing information.


Sentencing
Deer, John [DEF]
Count 1 abc123 abc123 - File with Court
Sentence
Sentence Type*
Community Service
Min. Length
Max Length
Unit
Hour
Sentence Begin Date
12/15/2023
Sentence Location
Amount $
Reduced To $
Notes
Credit
Credit Length
Unit
Credit Notes
Suspend
Amount Suspended $
Suspend Length
Unit
Suspend Notes

3. Add conditions, if applicable:



4. Click **[Save]**, **[Save and Back]**, or **[Back]**.

Digital signatures

Use digital signatures to sign documents without needing to print, sign, and scan them.

Create a stamp

The first step in creating a digital signature is to create a stamp. A stamp is an image that represents your signature:

1. Scan your signature and save it as an image file. For best results, use a PNG file with a transparent background.
2. Open the **Directory Person** for which you want to create a stamp.
3. Click the **Attachments** tab.
4. Click **[Add Attachment]**.

   A new row shows in the attachment table:

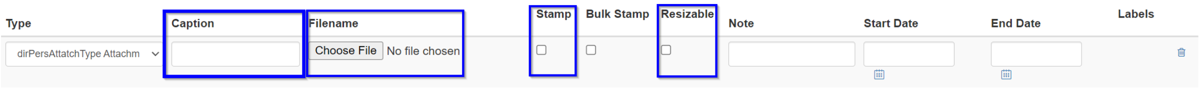
   

   Figure 2. A new **Directory Attachment** *table row.*

5. Fill in the fields:
   - **Type**: Select attachment type.
   - **Caption**: Enter a caption for the stamp.
   - **Filename**: Click **[Choose File]** and select the image file.
   - **Stamp**: Select to use the uploaded image as a stamp in the **Document Viewer**.
   - **Resizable**: Select to allow stamp resizing.

Using labels

Use labels to add text to a stamp. This is useful when text needs to be consistently added along with the stamp. For example, you could add the date and time to a date line.

1. Open the **Directory Person** for which you want to create a stamp.
2. Click the **Attachments** tab.
3. Click **[+]** under the **Labels** field.
4. Enter the text or template you want to use.

   Some examples are:

   - **Date and time**: `$DateUtil.formatDateTime($now)`
   - **Users real name**: `$user.realName`
   - **Users directory person role**: `$user.dirPerson.personRoleLabel`

These template examples populate the field with the current time or values from the **Directory Person**.

You can add multiple labels to the same stamp.

5. Set the **x** and **y** page coordinates for the label.

The coordinates are relative to the top-left corner of the stamp.

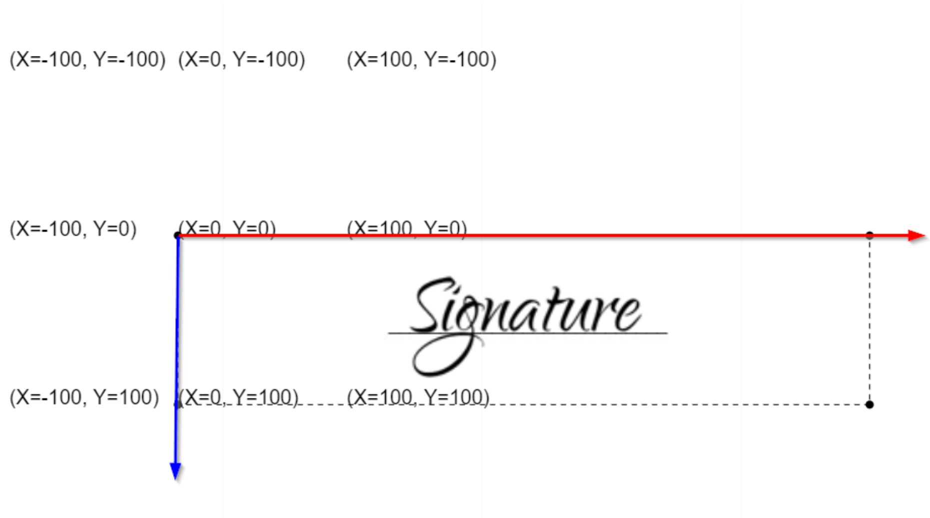


Figure 3. Example stamp with labels to show coordinates.

- The x-coordinate, shown in red, is 0 at the top-left corner of the stamp and increases to the right.
- The y-coordinate, shown in blue, is 0 at the top-left corner of the stamp and increases downward.

+ You may need to experiment to find appropriate coordinates to fit the stamp. You only need to complete this process once.

1. Set the **Font Size**.
2. Set the **Font Color**.

Figure 4. An example label configuration.

Sign a document

Once you create a stamp, you can use it to sign documents:

1. Open a document in the **Document Viewer**.
   a. Open a **Case**.
   b. Click the **Filing Cabinet** tab.
   c. Right-click a document and select **DocView**.
2. Click **[Stamps & Signatures]**.

Figure 5. The **[Stamps & Signatures]** *button.*

3. In the **Stamps & Signatures** area, click the stamp you want to use.

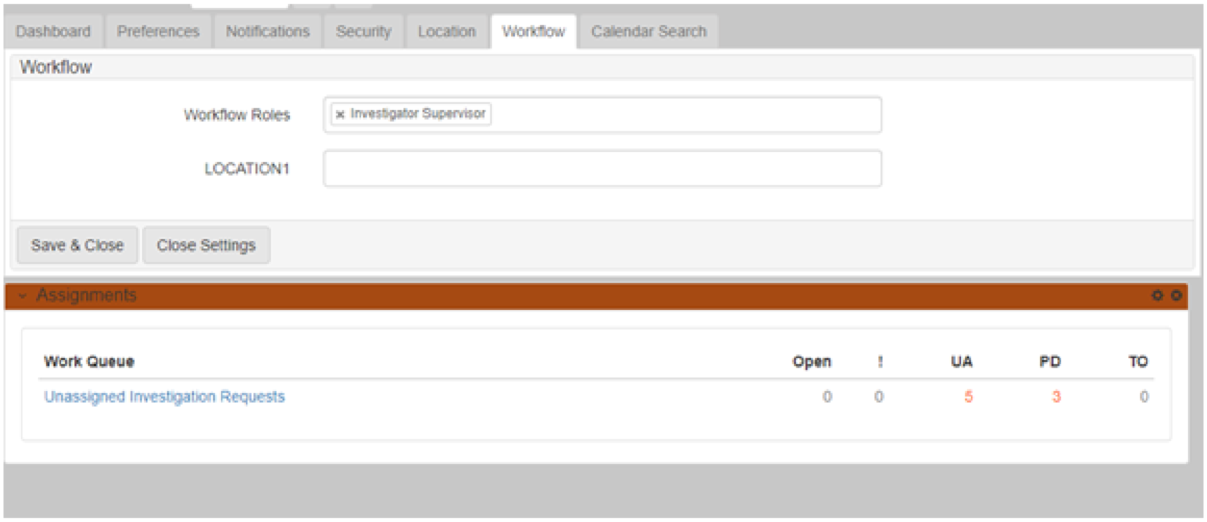
   The stamp name matches the **Caption** you set on the attachment.

4. Click the location on the document where the stamp should show.
5. Optional: move the stamp to the desired location.
6. Optional: resize the stamp.
7. Click **[Apply Stamps]** to finish signing the document.

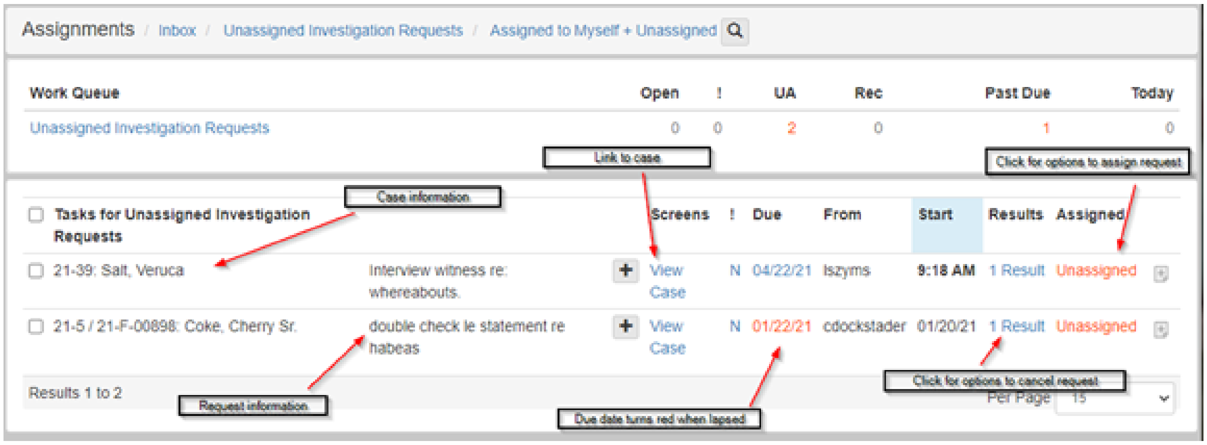
Investigation request workflow

Unassigned investigation requests

1. When an investigation request (`caseResearchRecord`) is added to the case, the status is set to **Pending** and a work queue assignment called **Unassigned Investigation Requests** is created. Anyone with the **Investigator Supervisor Workflow Role** has the assignment in their queue.

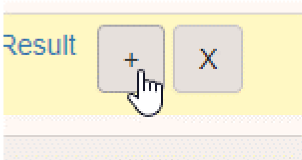


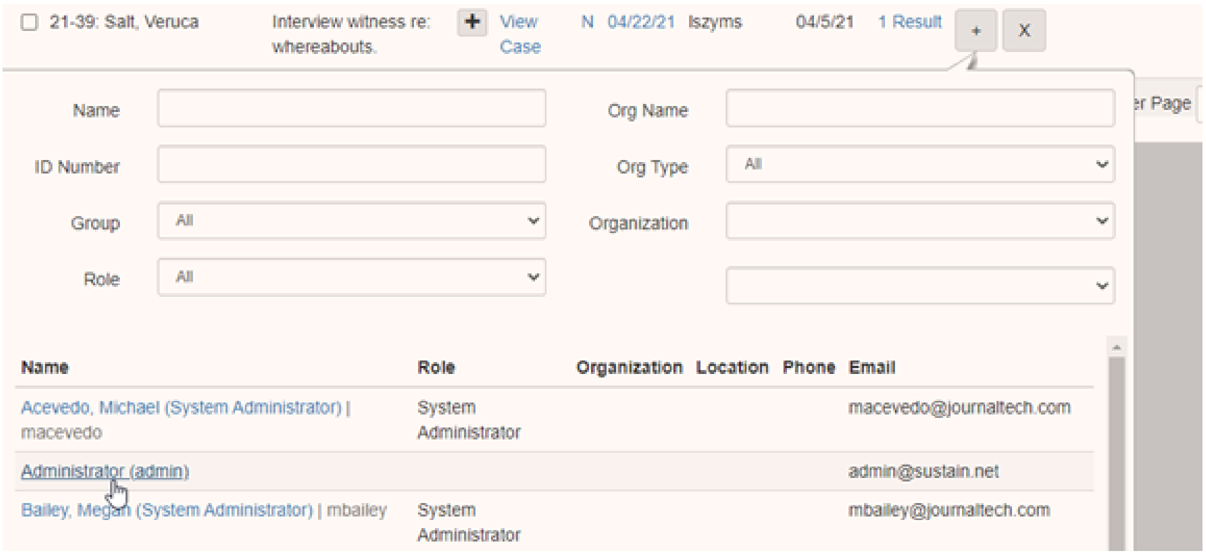
2. Click the work queue to view the list of unassigned investigation requests:



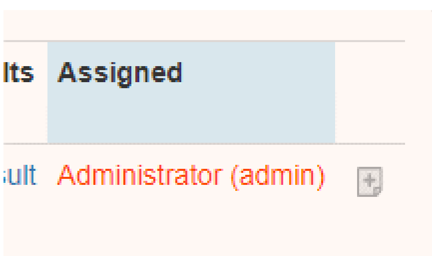
3. Assign the investigation request by clicking the red **Unassigned** under the **Assigned** column:

4. Click **[+]** to navigate to a directory search where you can select the request assignee:

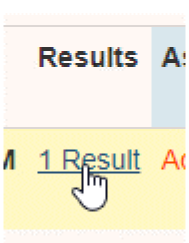


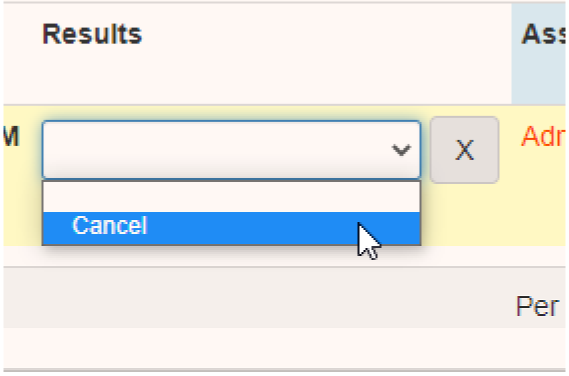


5. The chosen assignee is listed in red under the **Assigned** column. The action of assigning the request closes out the workflow. This work queue drops off the queue on screen refresh:



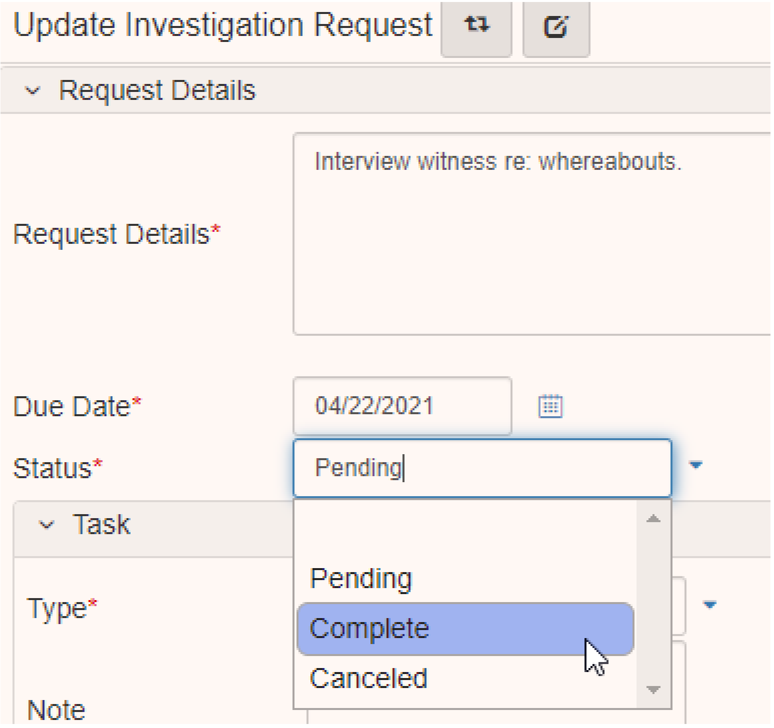
6. Cancel the investigation request by clicking the results and selecting **Cancel** in the dropdown:





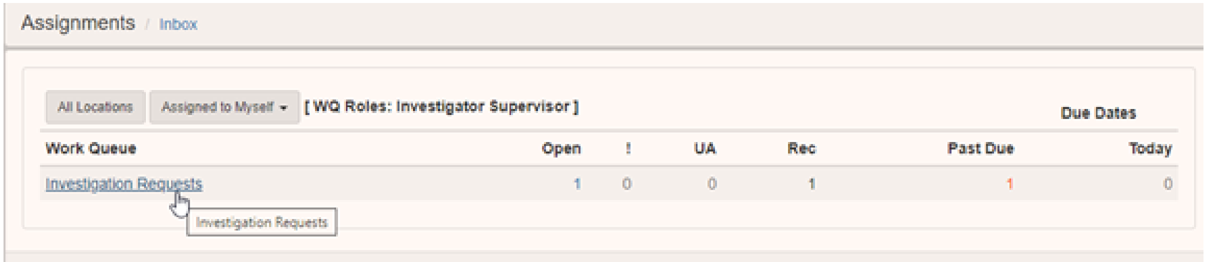
This action also closes out the workflow, and the work queue drops off the queue on refresh.

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

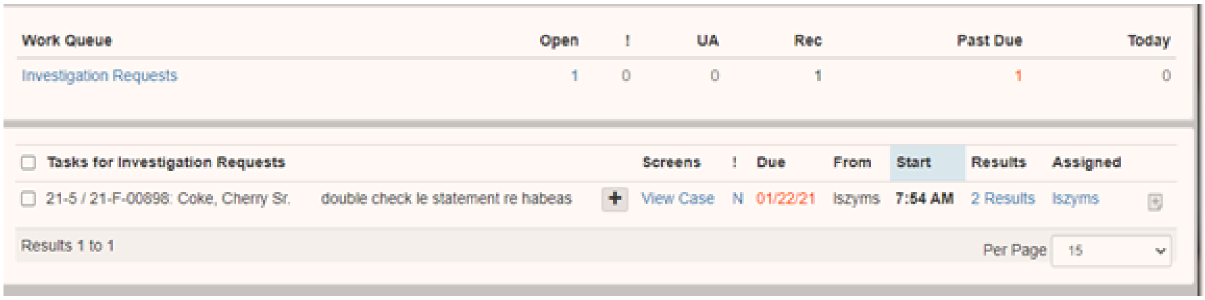


Assigned investigation requests

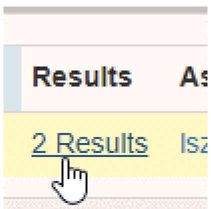
1. Once an assignee is set on an investigation request, a work queue called **Investigation Requests** is assigned to the request assignee:

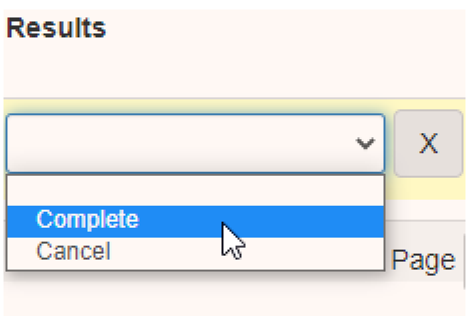


2. Click the work queue to show the list of unassigned investigation requests:



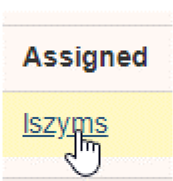
3. When the request is complete, click the results and select **Complete** in the dropdown:



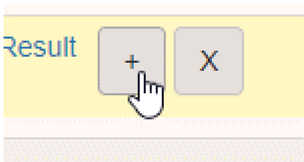


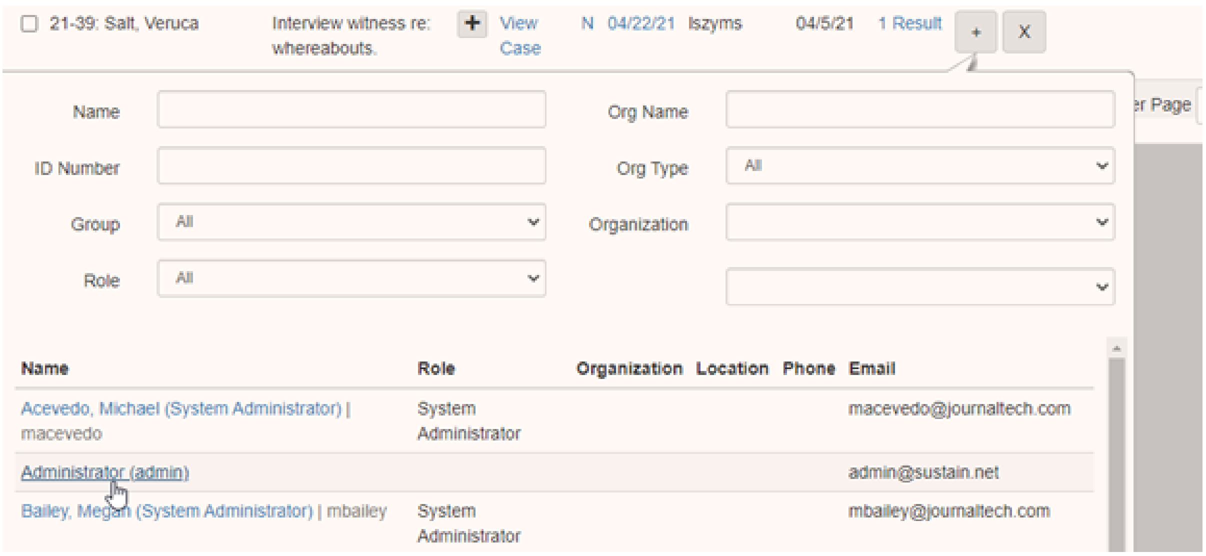
This changes the status of the request to completed and closes out the workflow. The work queue drops off the queue on refresh.

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

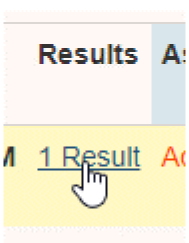


5. Click **[+]** to navigate to a **Directory Search** where you can select the new request assignee:

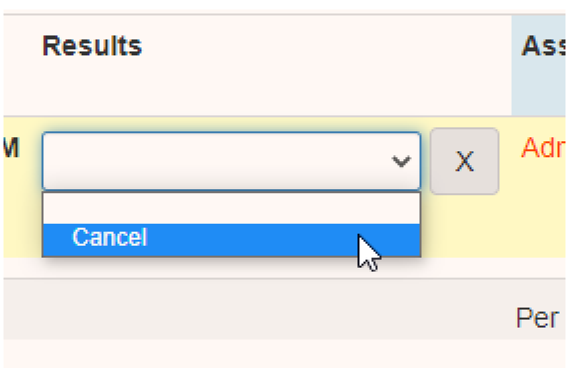




6. You can cancel the investigation request by clicking in the results:

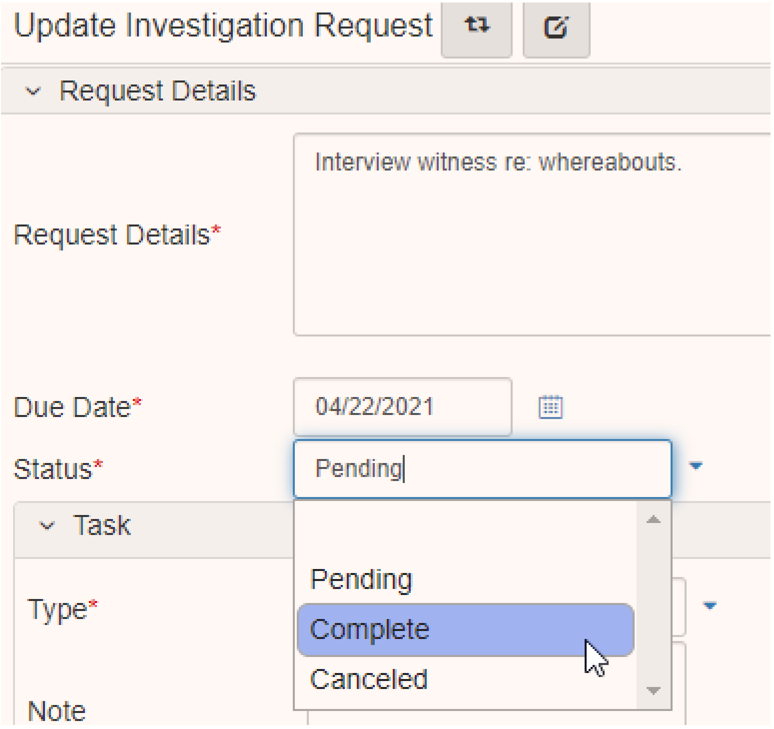


Then select **Cancel** in the dropdown.



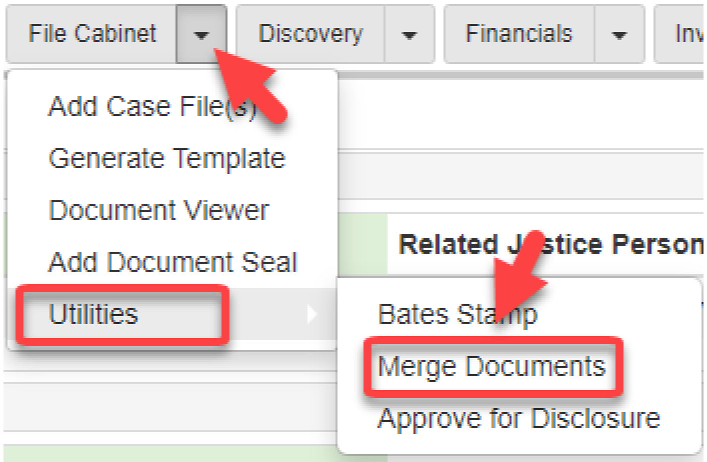
This action also closes out the workflow, and the work queue drops off the queue on refresh.

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

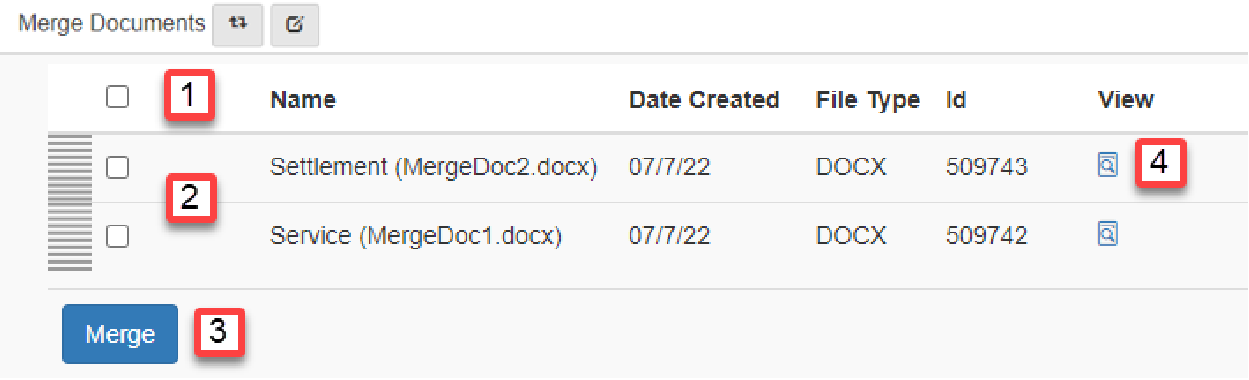


Merge documents

The merge documents utility creates a combined PDF file for printing or downloading. To start merging your documents, select the dropdown arrow next to **File Cabinet**, hover over **Utilities**, and click **Merge Documents**.

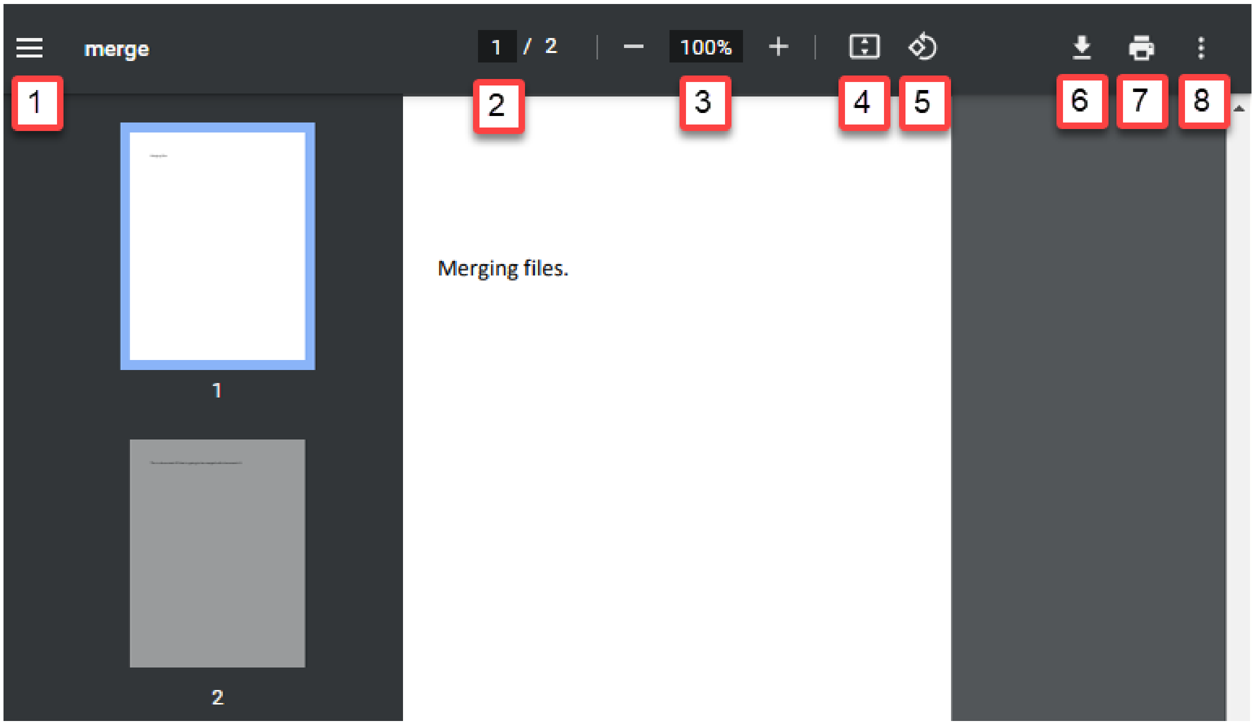


The **Merge Documents** screen shows:



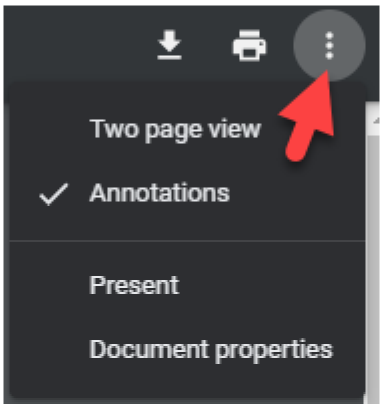
1. Select all files.
2. Or select individual files.
3. Click **[Merge]**.
4. You can also show your files by clicking the View Document icon.

After you click **[Merge]**, the documents you selected merge into one document and show in a new window:



1. Expand or collapse your thumbnail icons.
2. Select the page you want to show.

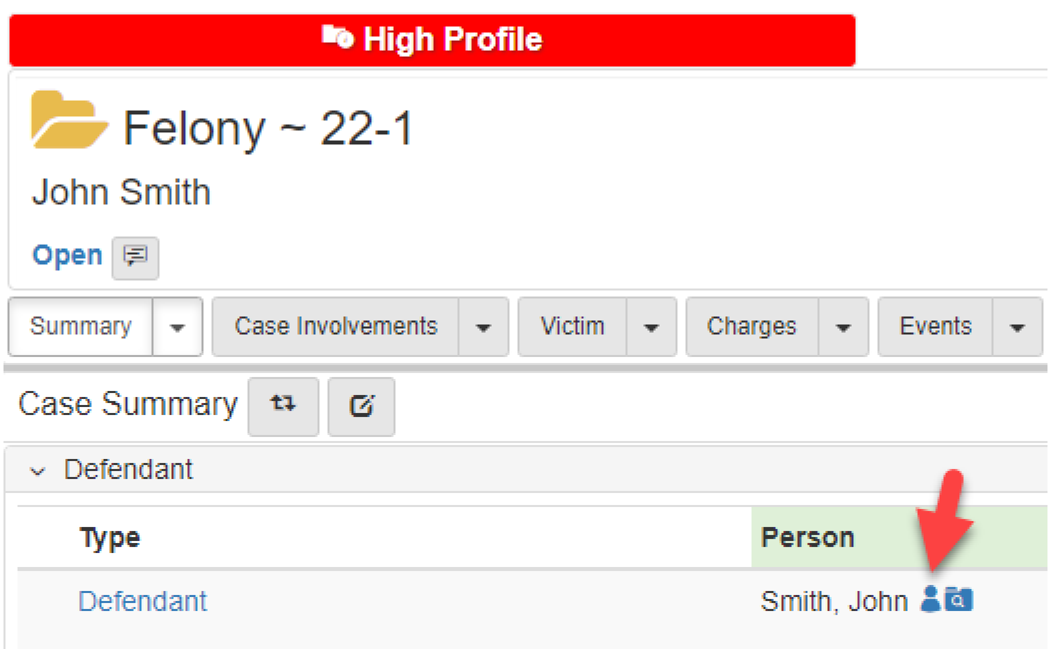
3. Select your desired zoom.
4. Fit your document to page.
5. Rotate your document.
6. Download your document.
7. Print your document.
8. Select from a list of options:



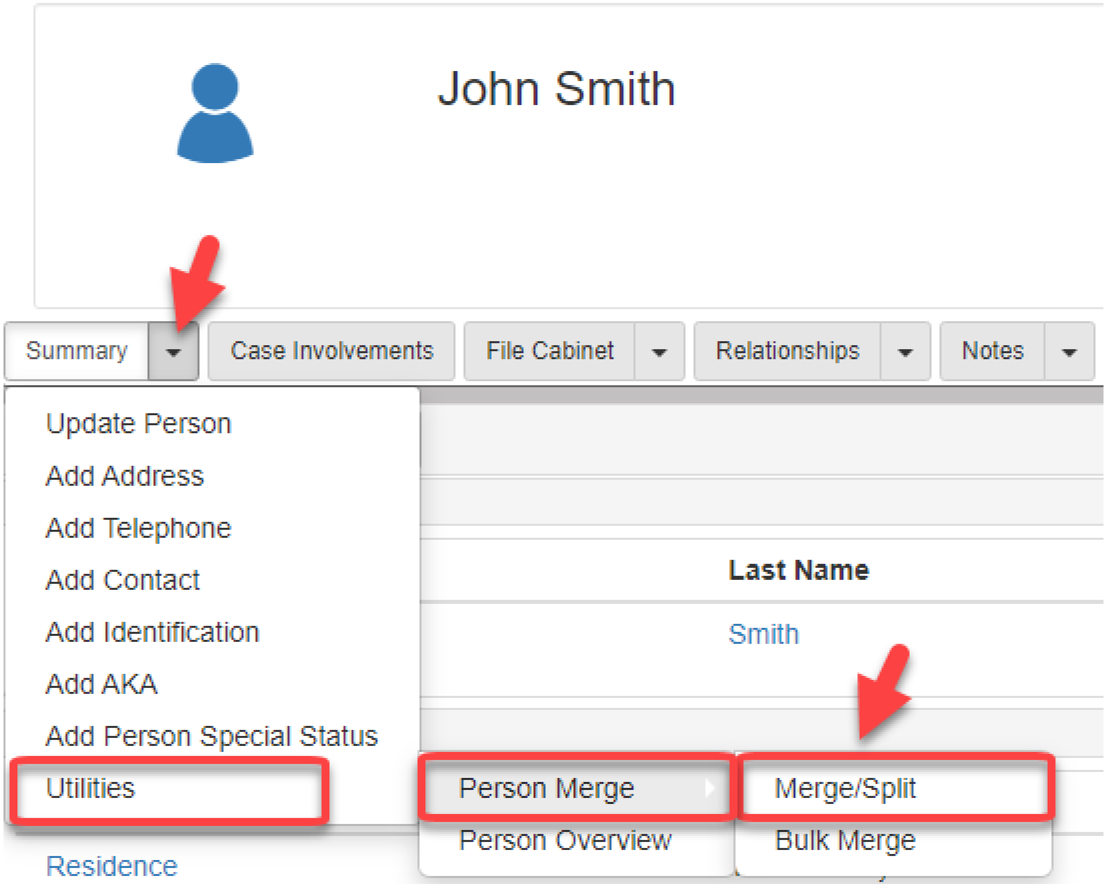
Person merge or split

Person merge

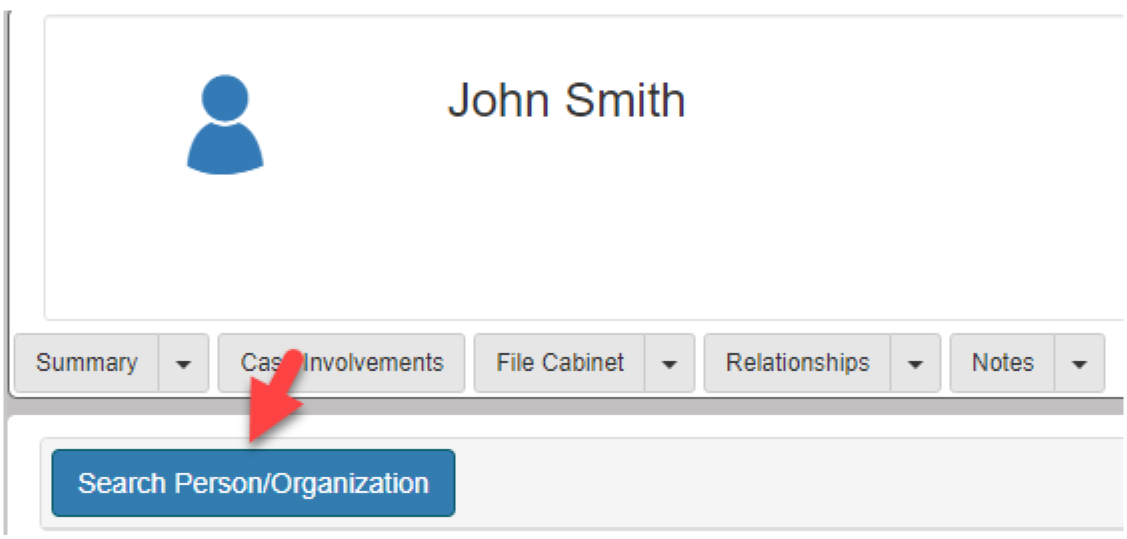
1. To start a person merge, click the **Open Person View** icon. The **Person Summary View** screen shows:



2. In the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, click **Merge/Split**:

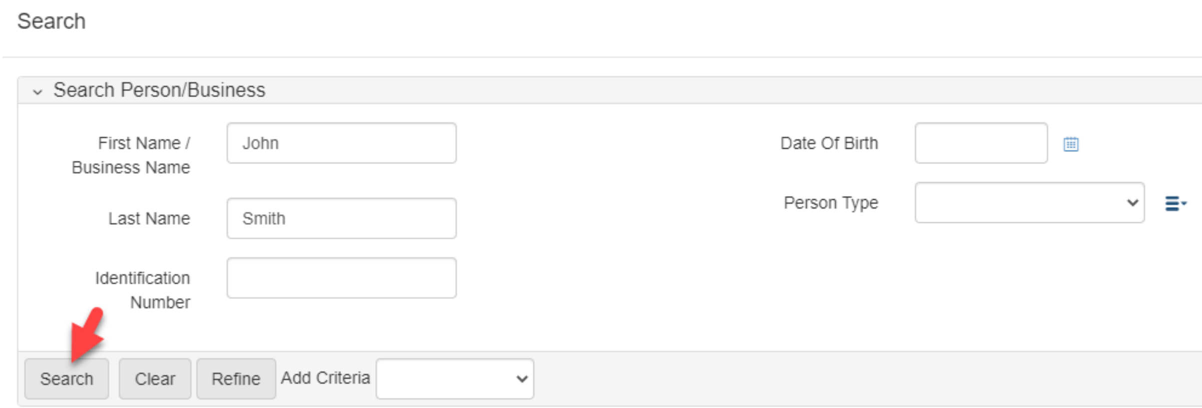


3. In the **Person Summary View**, click **[Search Person Organization]**:

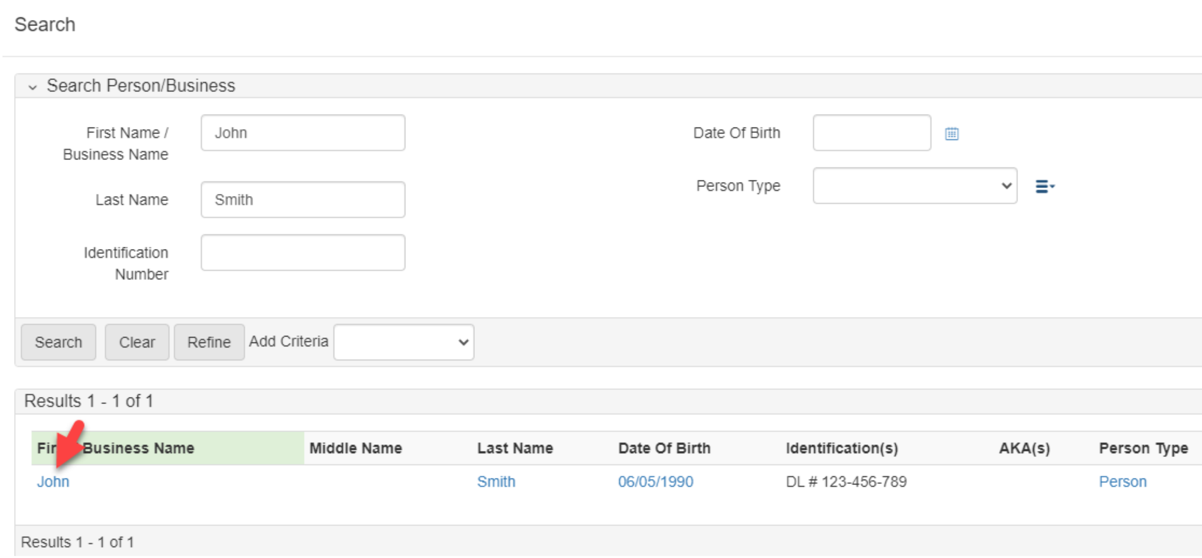


4. In the **Search Person/Business** panel, you can search by **First Name/Business Name**,

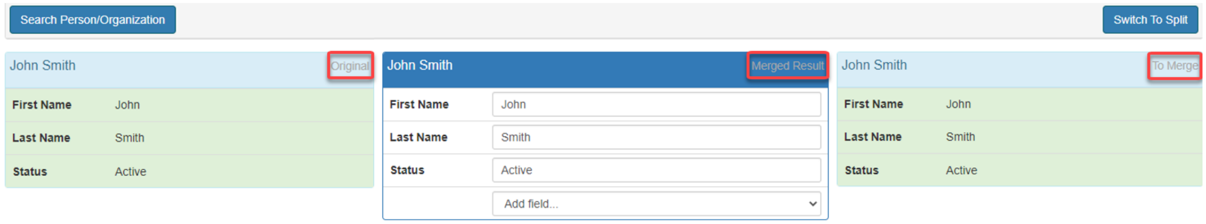
Last Name, **Identification Number**, **Date of Birth**, and **Person Type**. Enter your search criteria, then click **[Search]**:



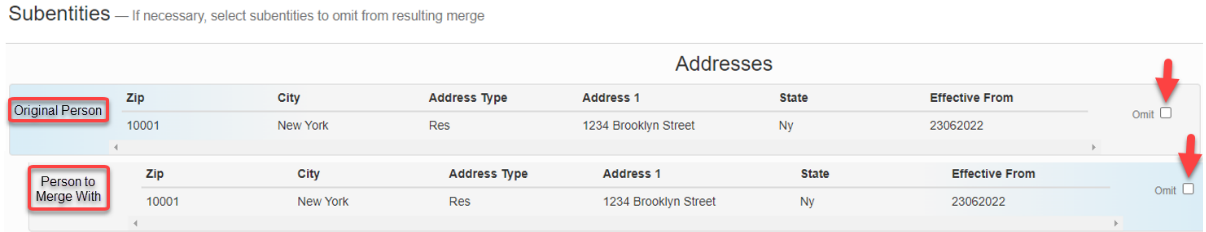
5. In the **Results**, click the person you want to merge:



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

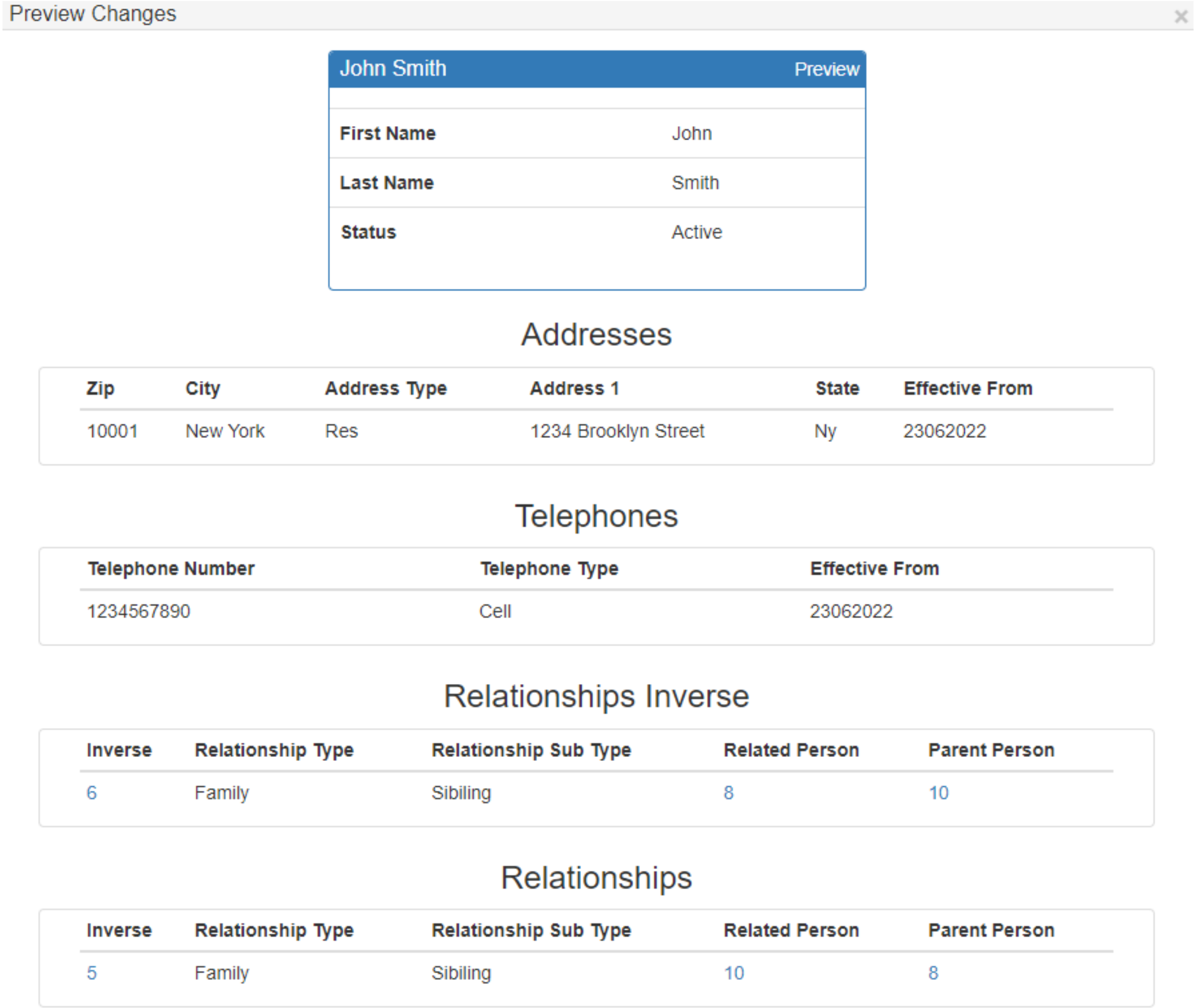


7. To finish your merge, you need to select which subentities you want to omit for your merged result. Select **Omit** to omit the subentity from the original person or to omit the subentity from the person to merge with:



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:

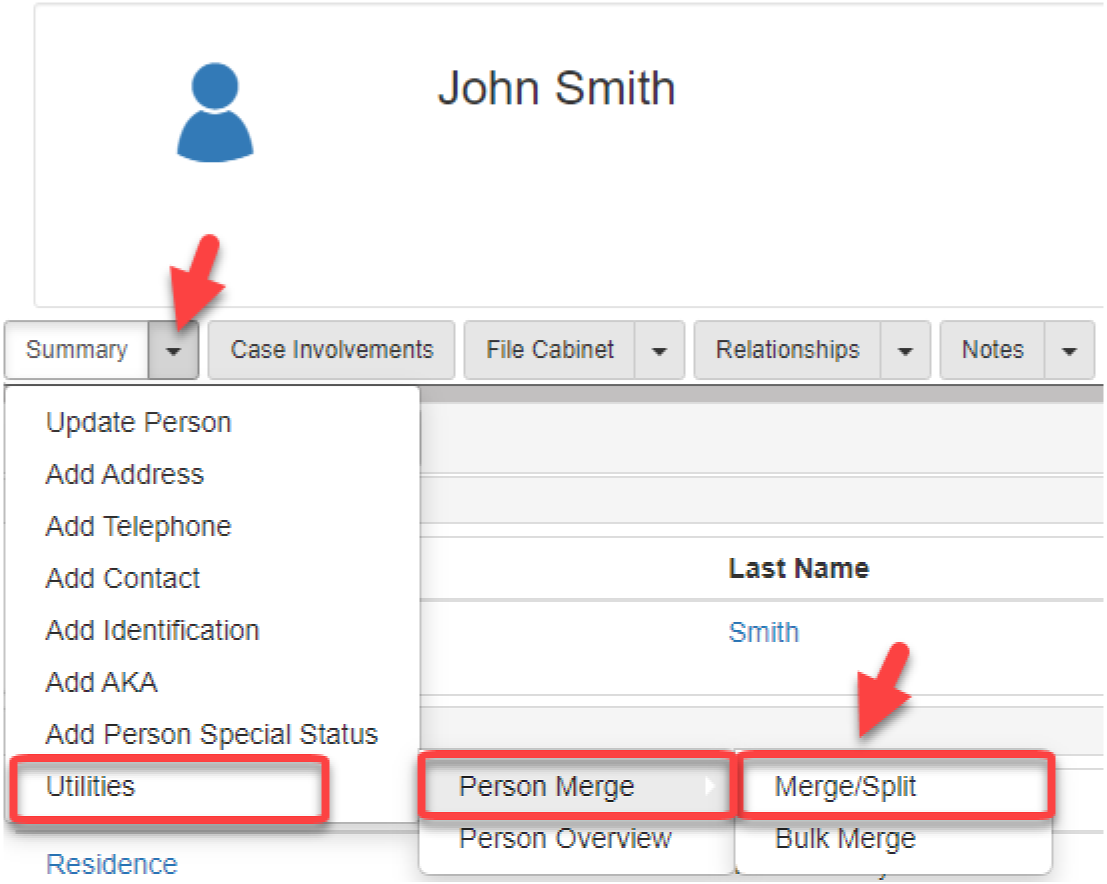


10. Click **[Cancel]** or **[Save]** on your Person Merge:

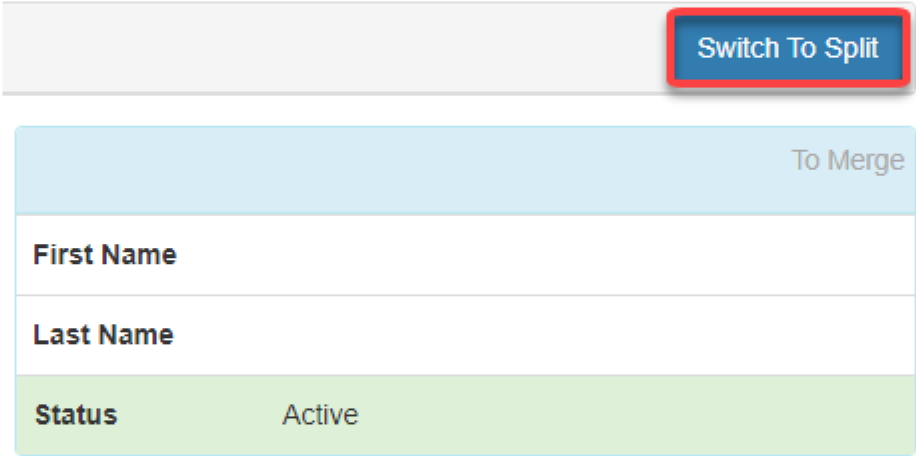
Person split

1. To start a person split, click the **Open Person View** icon. The **Person Summary View** screen shows:

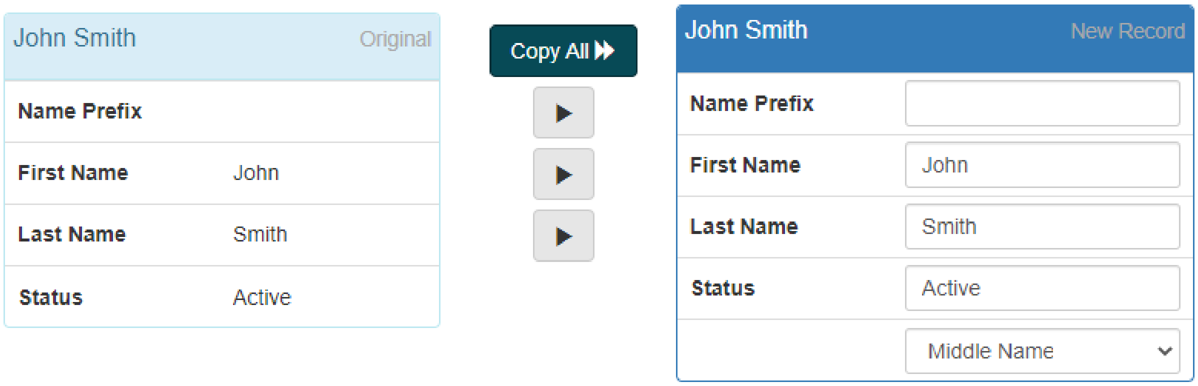
2. In the **Summary** dropdown, hover over **Utilities**, hover over **Person Merge**, click **Merge/Split**:



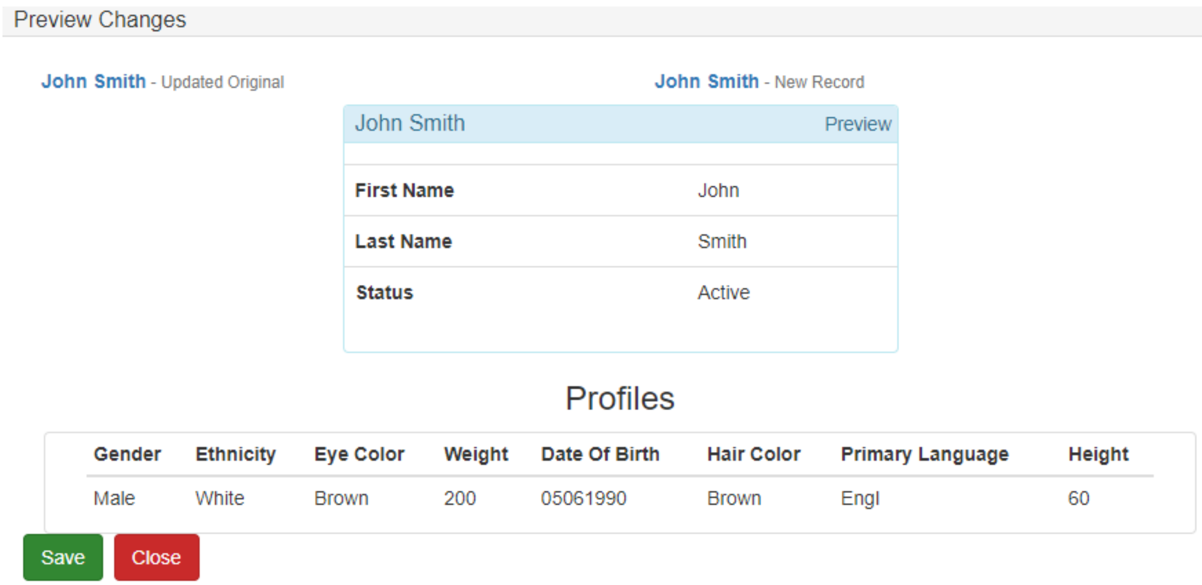
3. Click **[Switch To Split]** on the right of your screen.



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]**:



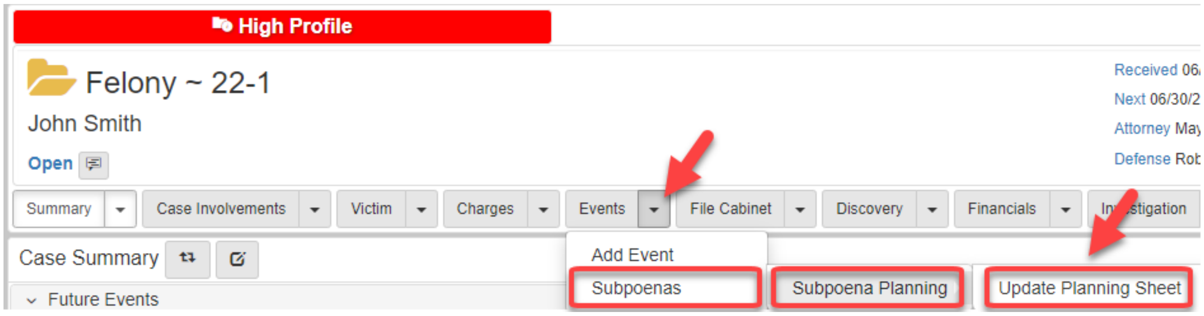
Subpoena process

Required conditions to generate a subpoena

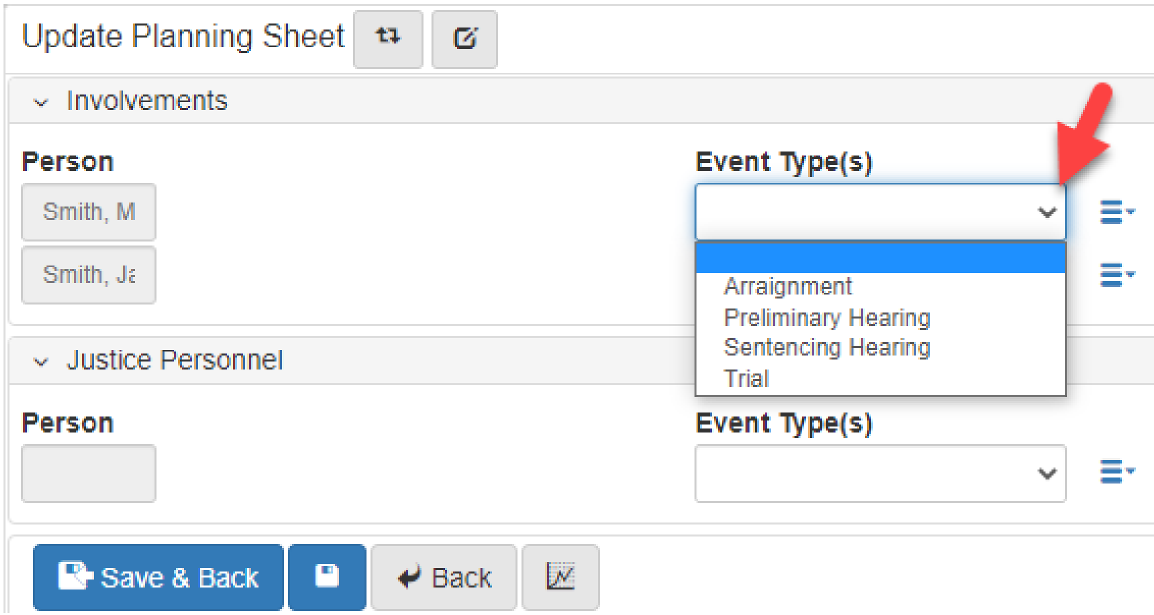
- Subpoenable Events: Events where witnesses are typically subpoenaed.
- Subpoenable Parties: Parties that can be subpoenaed.
- Subpoenable Case Assignments: Assignments that can be subpoenaed.

Update planning sheet

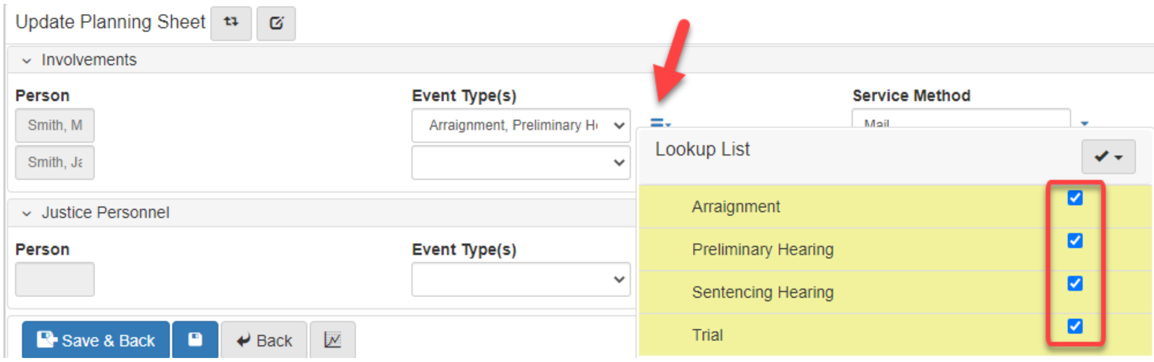
1. Start the subpoena process by clicking the Events dropdown arrow, hover over Subpoenas, hover over Subpoena Planning, and click **[Update Planning Sheet]**:



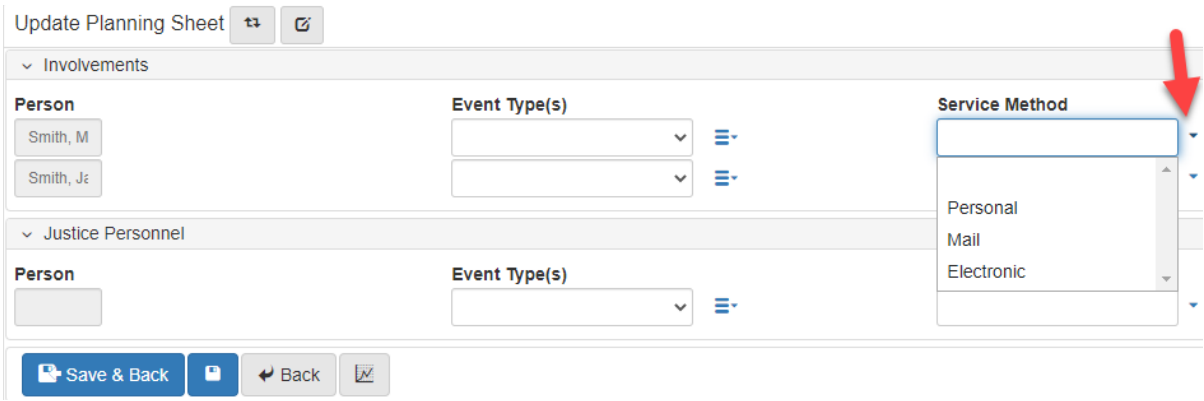
2. On the **Update Planning Sheet** screen, there are two ways to choose an event:
   - In the **Event Types** dropdown, select one event type.



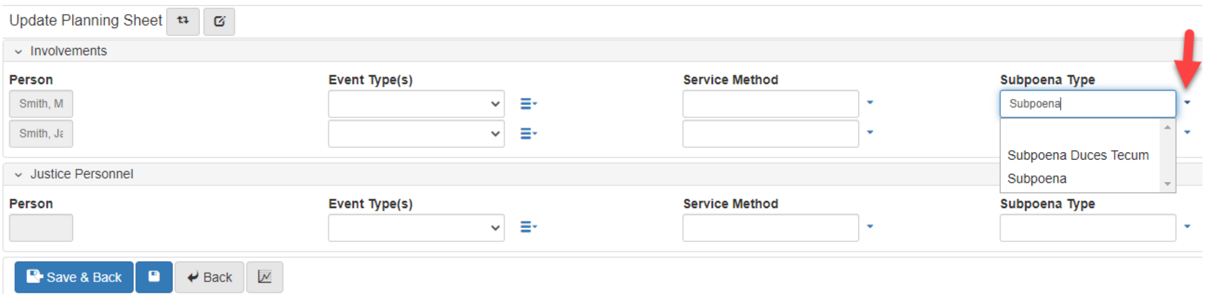
   - Use the **Lookup List** next to **Event Types** to select multiple events.



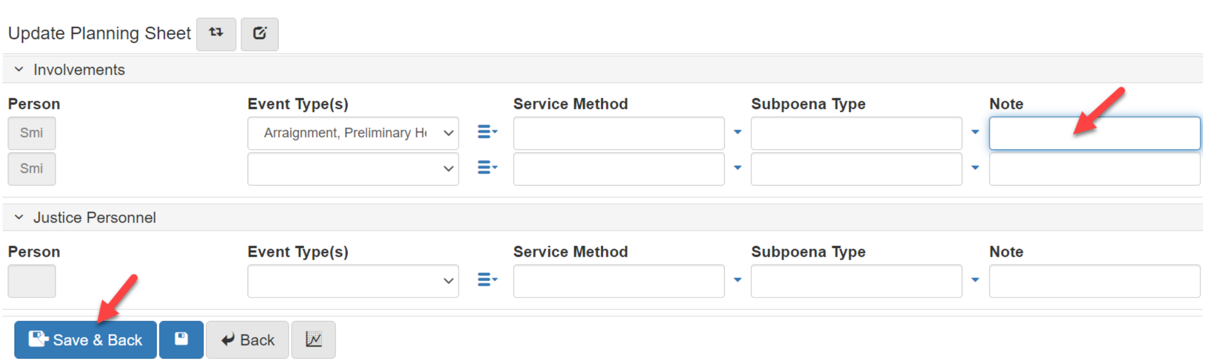
3. Select the **Service Method**:



4. Select the **Subpoena Type**:

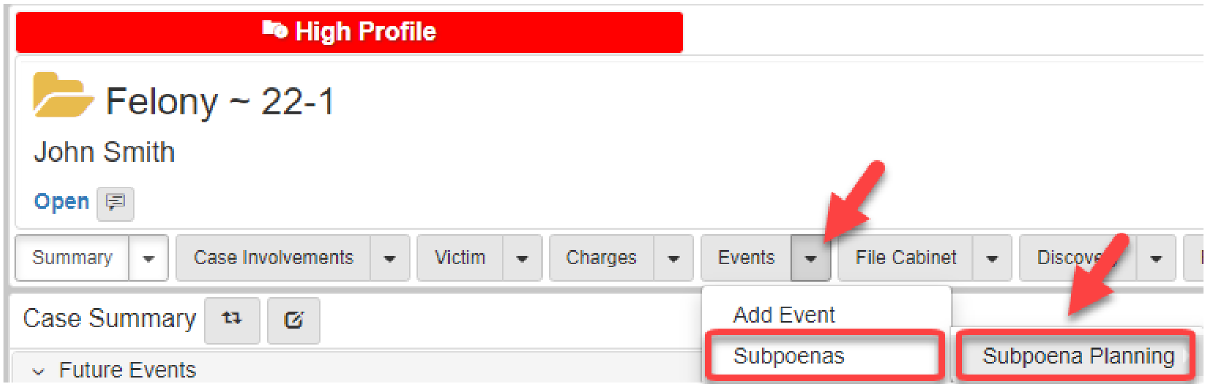


5. Type a note.
6. When the planning sheet is complete, click **[Save and Back]**:

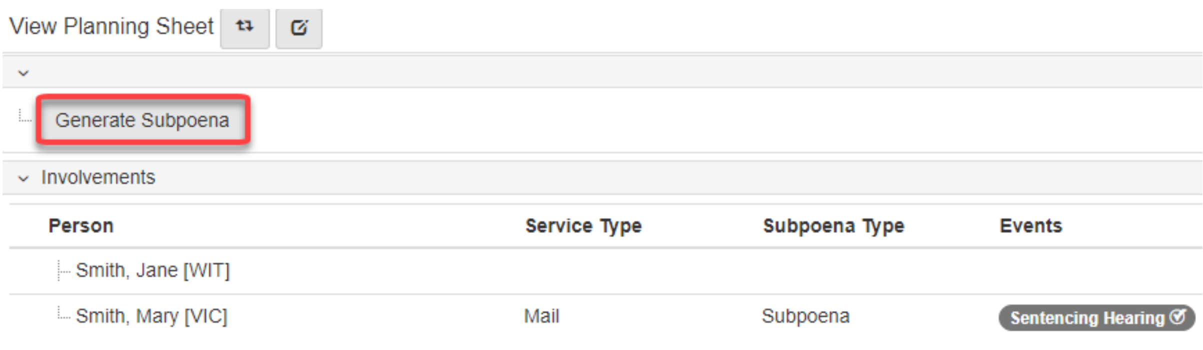


Subpoena planning

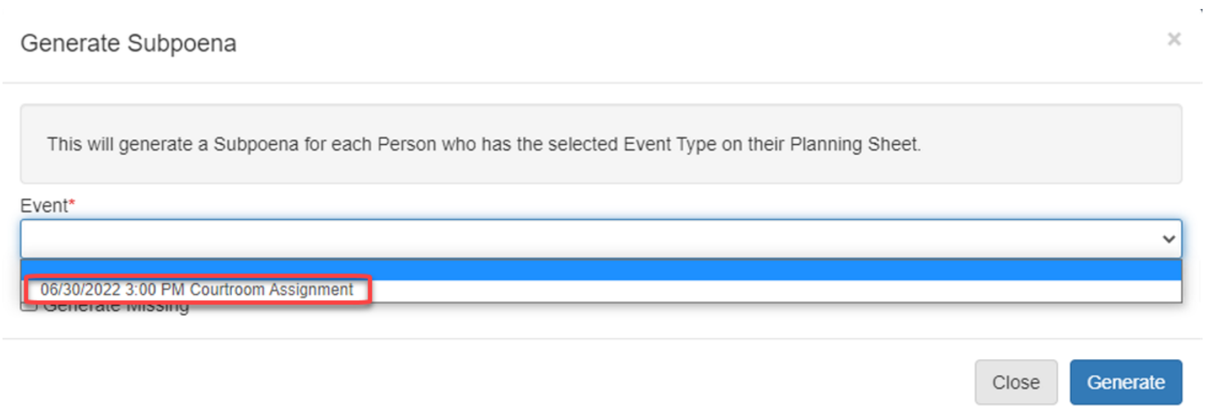
1. Generate a subpoena by clicking the **Events** dropdown, hovering over **Subpoenas**, then clicking **Subpoena Planning**:



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



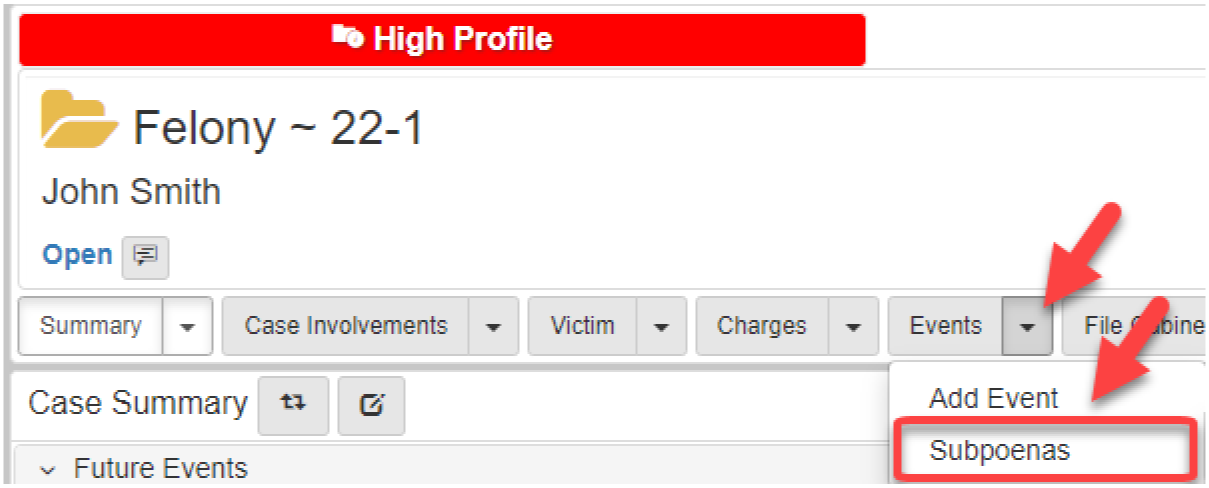
3. In the **Generate Subpoena** dialog, select the Subpoena event:



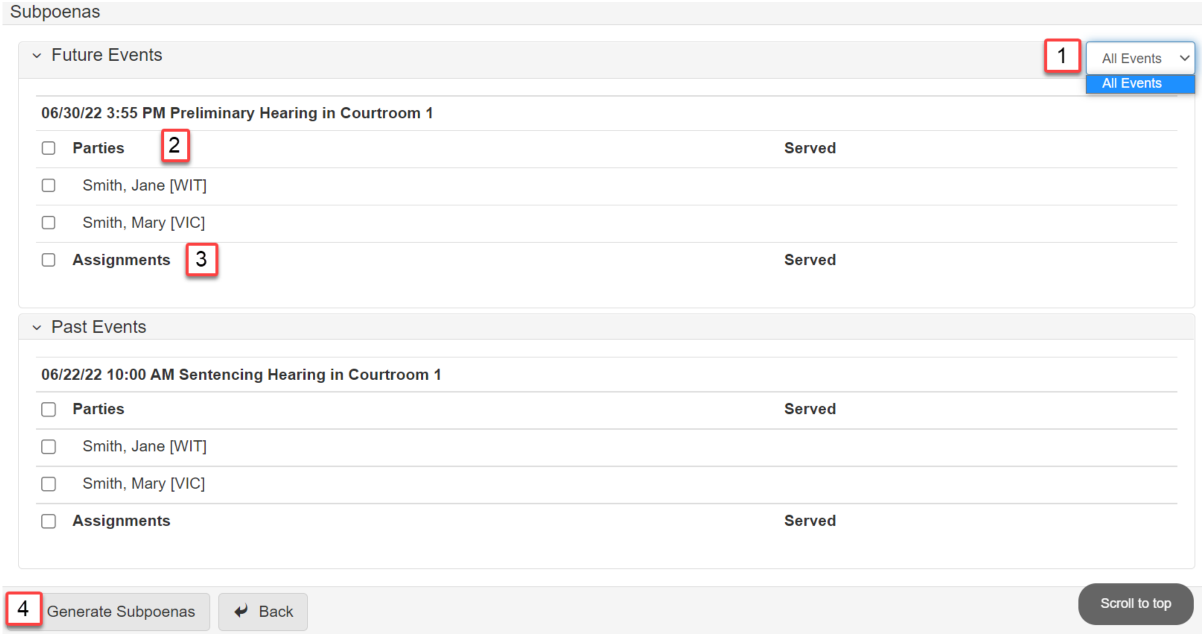
4. Click **[Generate]**.

Subpoenas future and past events

You can also generate a subpoena by clicking the **Events** dropdown, then clicking **Subpoenas**:



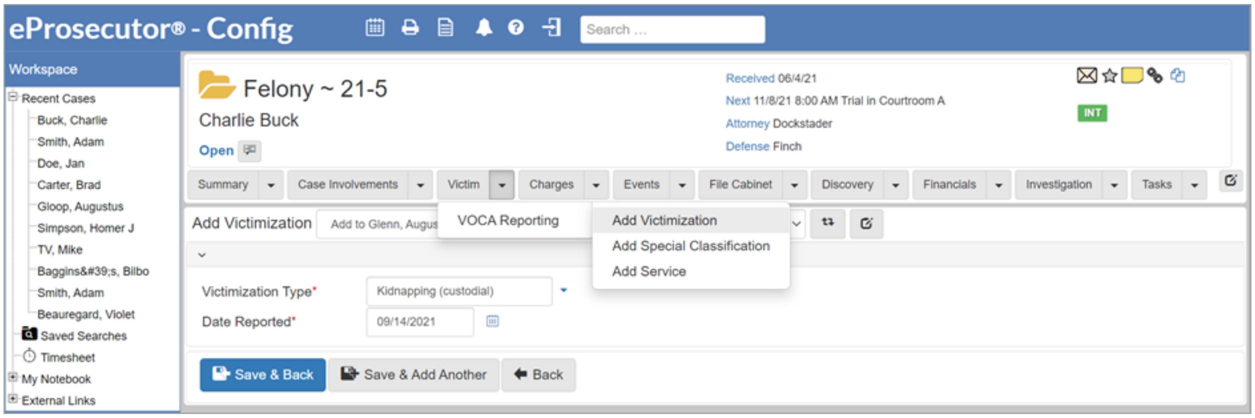
1. Select the events that need subpoenas generated.
2. Select the parties that need to be served.
3. Select the assignments that need to be served.
4. Click **[Generate Subpoenas]**:



VOCA reporting

Add VOCA report items

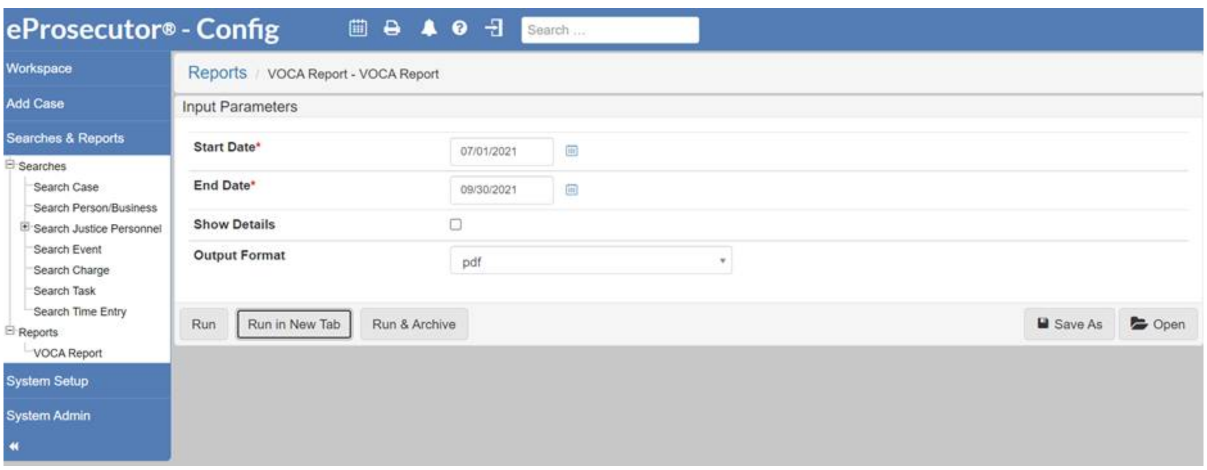
The Federal Victims of Crime Act Report (VOCA) includes victimizations, special classifications, and services. Adding these items are found in the dropdown on the **Victim** tab inside a **Case**. The added items are viewable from the **Victim Folder View**:



Generate the VOCA report

To generate the VOCA report:

1. Navigate to **Left navigation › Searches & Reports › Reports › VOVA Report**.



2. Enter the time period and the output format.
3. If needed, select **Show Details** to include links for **Case** and **Person** records in the report:
4. Click **[Run]**. The report shows:

VOCA Report

Date Reported between 07/01/2021 and 09/30/2021

I. Population Demographics

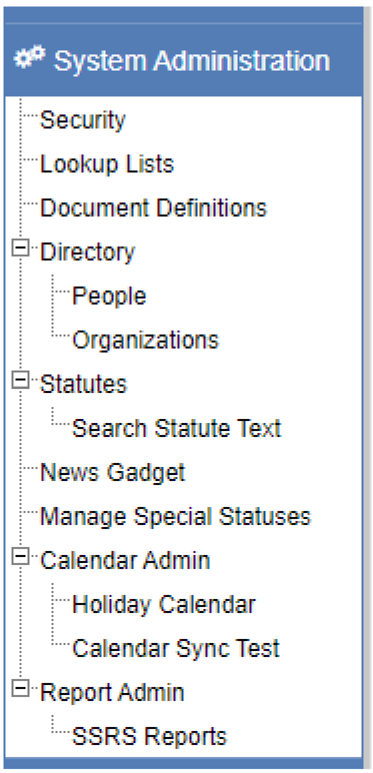
TOTAL number of individuals who received services during the reporting period	3
Race/Ethnicity	
Black/African American	0
White Non-Latino/Caucasian	1
Asian	0
American Indian/Alaska Native	0
Native Hawaiian and Other Pacific Islander	0
Some Other Race	0
Hispanic or Latino	0
Multiple Races	0
Not Reported	2
Gender Identity	
Male	1

4. Administrator guide

As an administrator, you are able to manage the eProsecutor Online environment in several ways, including:

- Managing users.
- Creating and modifying **Document Definitions**.
- Adding and editing items in lookup lists.

All the tasks that an administrator can execute are found in the **System Administration** section in the **Left navigation** menu.



Refer to 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 dropdowns in eProsecutor Online. To add, change, and delete items, refer to 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** item 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 eProsecutor Online.

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** 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 administration

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 Report administration for your agency.

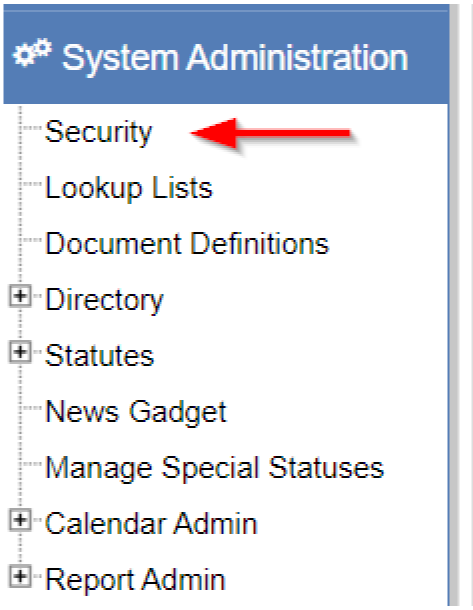
Users and security

This section describes the administrative features that manage user accounts and the permissions granted to them:

- https://documentation.journaltech.com/eProsecutorOnline/admin/users/accounts.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/users/navigation.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/users/security_groups.html

User accounts

Access the **User Accounts** section by navigating to **Left navigation › System Setup › Security › Users**:



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 eProsecutor Online.
- **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 **Real Name** field is populated by the system.
- **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.

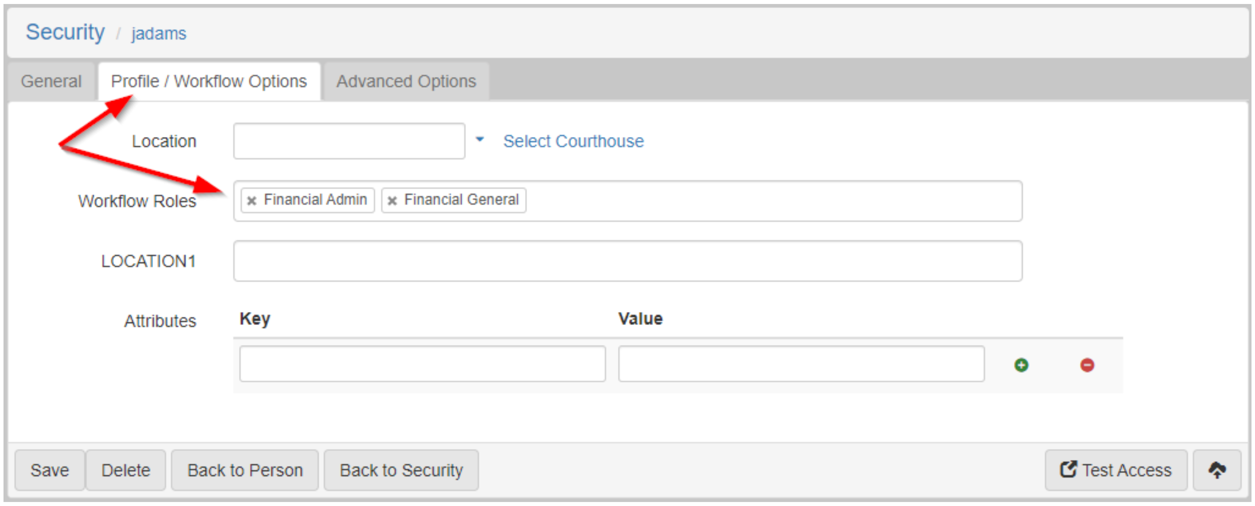
Workflow roles

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]**.



Advanced options

If a user gets locked out of their account, you can come here to unlock the account. The screen reports how many login attempts were recently made. You can also set a date for the account to expire.

If an account is locked due to too many failed attempts, you can restore access by following these steps:

1. Clear the **Failed Login Count** field.
2. Deselect **Account Locked**.
3. Clear the **Password Expired** field or setting it to a date somewhere in the future.

You can also use this tab to expire an account sometime in the future or indefinitely. You can set an **Account Expires** date or you can select **Account Disabled** to disallow logins to the account. This also prevents the user from being able to request password reset link through email. It is advised to do this if you must remove access to the system for a user, as in the case of employee termination.

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 user security group determines the available navigation settings.

The following tables the describe the menus available to each security group.

Left navigation

This is a table with the security groups in rows, and the Left navigation 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		✓			✓		✓	✓

Security Group	Accounting	Add case	Cashier	Financial setup	Searches & reports	System administration	Tools	Workspace
General_Financial		✓	✓		✓		✓	✓
General_Seal		✓			✓		✓	✓
General_Seal_Financial		✓	✓		✓		✓	✓
LocalAdminUser						✓	✓	
PowerUser		✓			✓		✓	✓
Power_Financial	✓	✓	✓	✓	✓		✓	✓
Power_Seal		✓			✓		✓	✓
Power_Seal_Financial	✓	✓	✓	✓	✓		✓	✓
Super		✓			✓	✓	✓	✓
Super_Financial	✓	✓	✓	✓	✓	✓	✓	✓
Super_Seal		✓			✓	✓	✓	✓
Super_Seal_Financial	✓	✓	✓	✓	✓	✓	✓	✓

Security Group	Accounting	Add case	Cashier	Financial setup	Searches & reports	System administration	Tools	Workspace
ViewOnly					✓		✓	✓

Case navigation

This is a table with 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

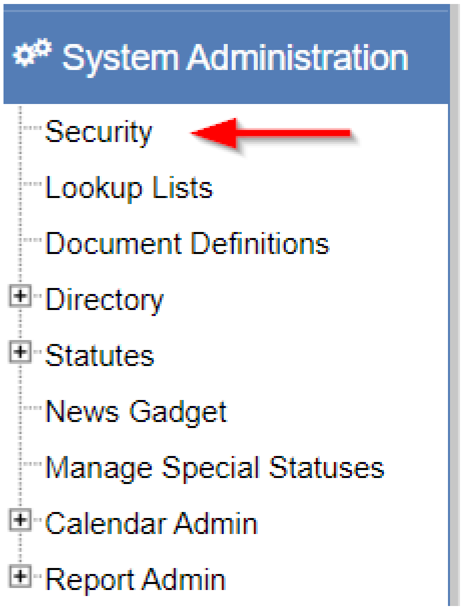
This is a table with the security groups in rows, and the person navigation menus in the columns. A check mark in a cell means that the security group in the row has access to the navigation menu in the column.

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

The **Security Groups** page can be accessed by navigating to **Left navigation pane › System Setup › Security** and going to the *Groups* tab.



Permissions

A security group is a group that is assigned various permissions in the system that can be applied to individual users. The default security groups and the permissions granted to each:

Table 1. Permissions for Cases and Persons

Security Group	View	Add/Update	Delete
GeneralUser	✓	✓	
General_Financial	✓	✓	
General_Seal	✓	✓	
General_Seal_Financial	✓	✓	
LocalAdminUser			
PowerUser	✓	✓	✓
Power_Financial	✓	✓	✓
Power_Seal	✓	✓	✓
Power_Seal_Financial	✓	✓	✓
Super	✓	✓	✓

Security Group	View	Add/Update	Delete
`Super_Financial`	✓	✓	✓
`Super_Seal`	✓	✓	✓
`Super_Seal_Financial`	✓	✓	✓
`ViewOnly`	✓		

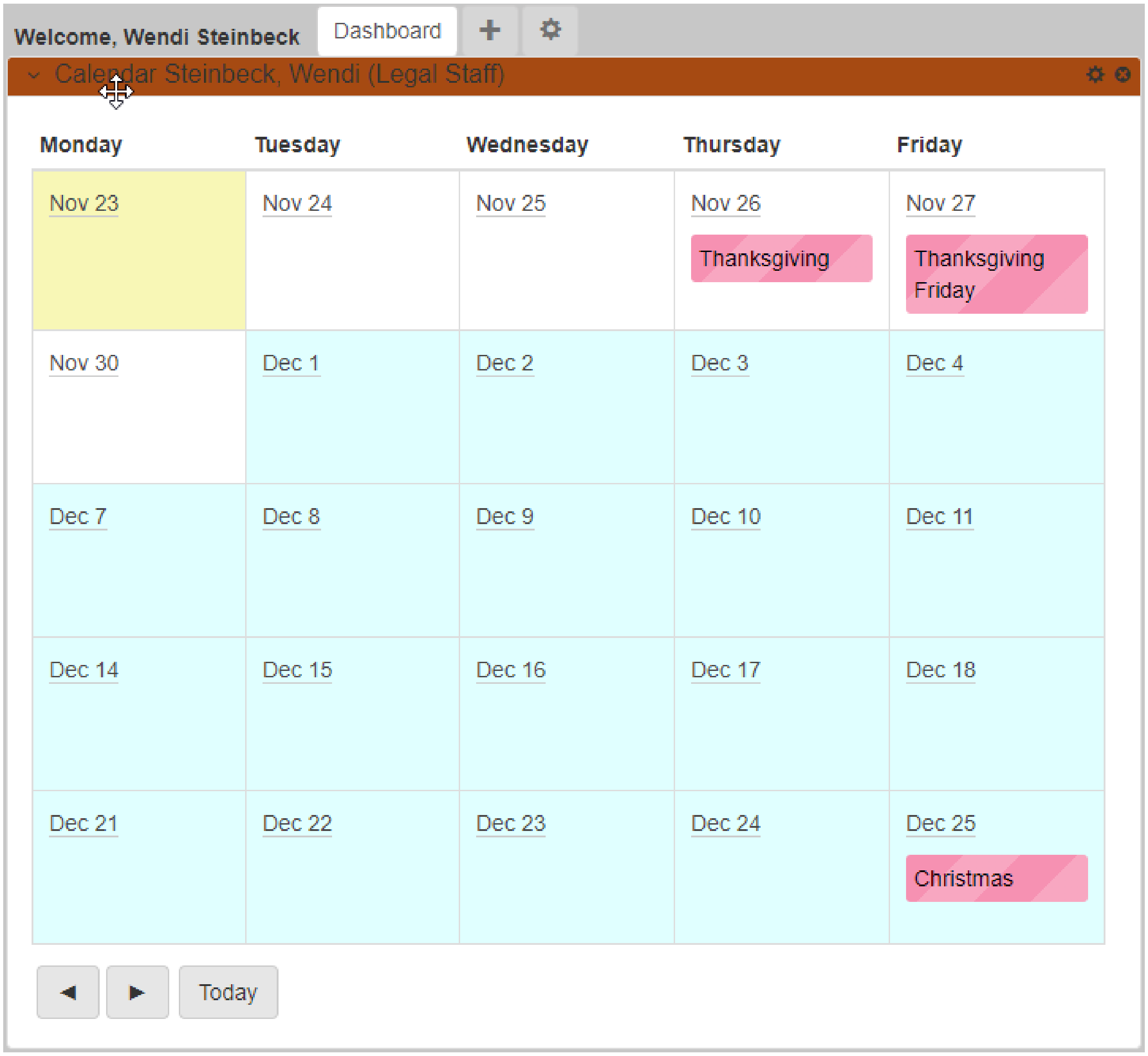
Table 2. Users, Sealing, and Financials permissions

Security Group	Administer Users	Seal Cases, Documents	Use Financials	Administer Financials
`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`				

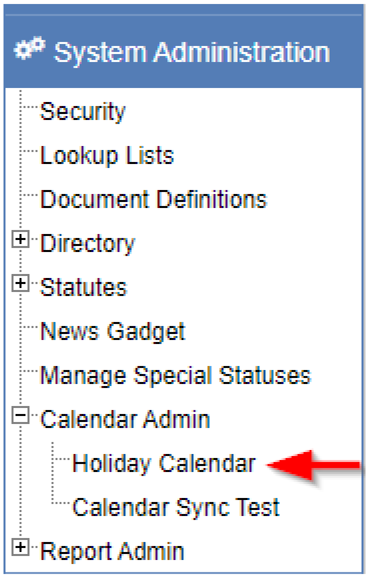
Calendar administration

Holiday calendar

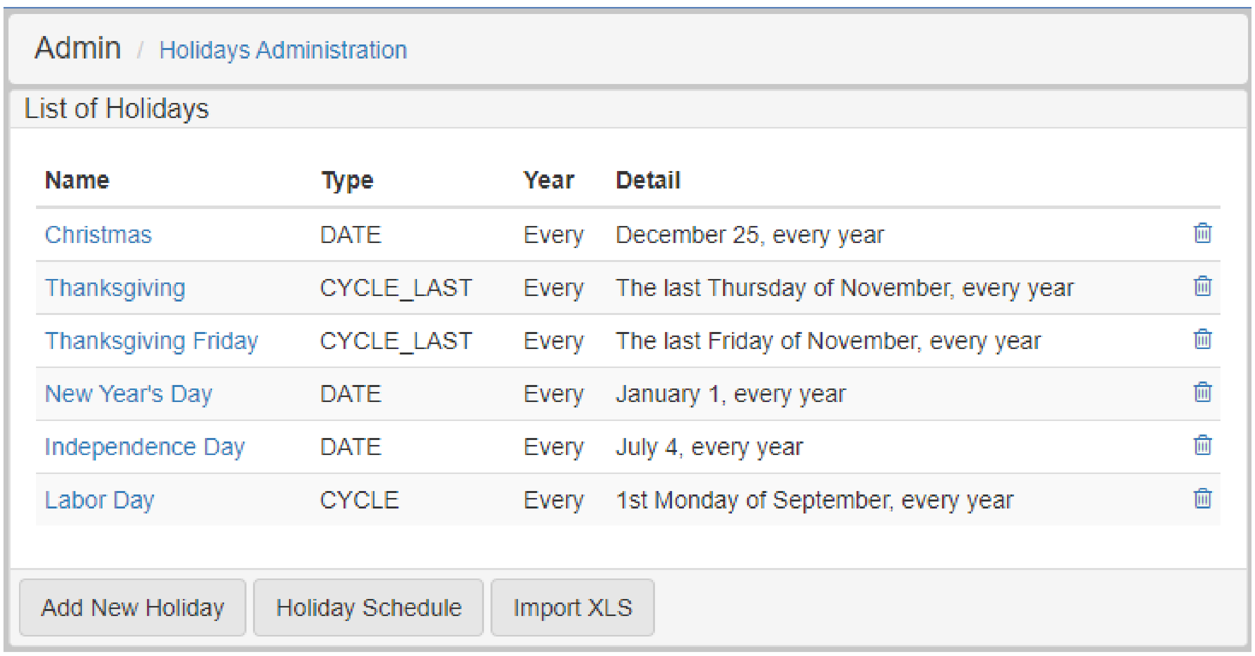
The holiday calendar is used to setup recurring holidays that your agency observes. These holidays show on calendars in eProsecutor Online, and aid you in scheduling.



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.


Admin / Holidays Administration

List of Holidays

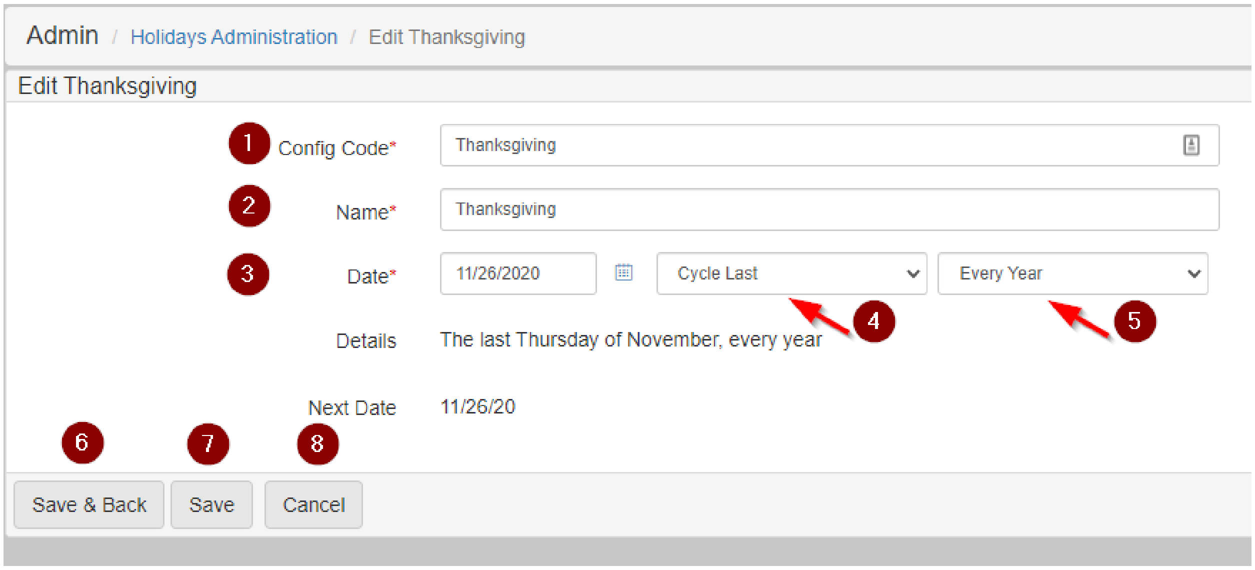
Name	Type	Year	Detail
Christmas	DATE	Every	December 25, every year
Thanksgiving	CYCLE_LAST	Every	The last Thursday of November, every year
Thanksgiving Friday	CYCLE_LAST	Every	The last Friday of November, every year
New Year's Day	DATE	Every	January 1, every year
Independence Day	DATE	Every	July 4, every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

Add New Holiday | Holiday Schedule | Import XLS

This screen list all the holidays that are 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

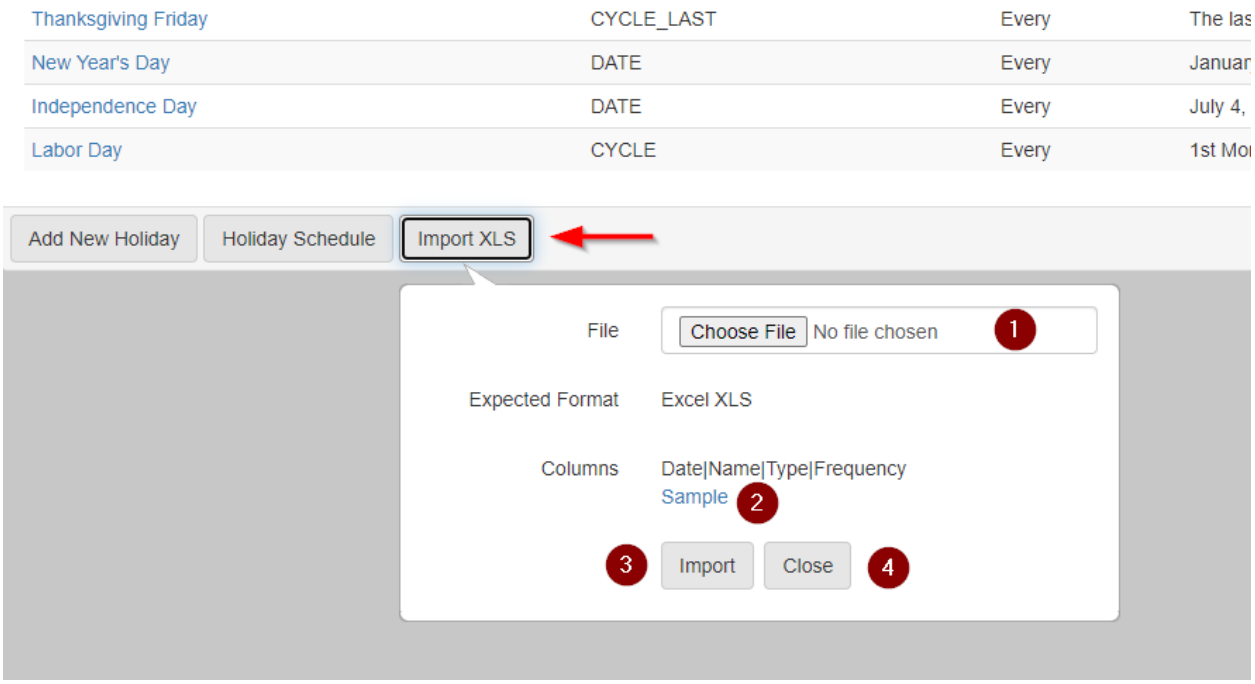
To add a new holiday, click **[Add New Holiday]** at the bottom of the screen. To edit an existing holiday, click the holiday name:



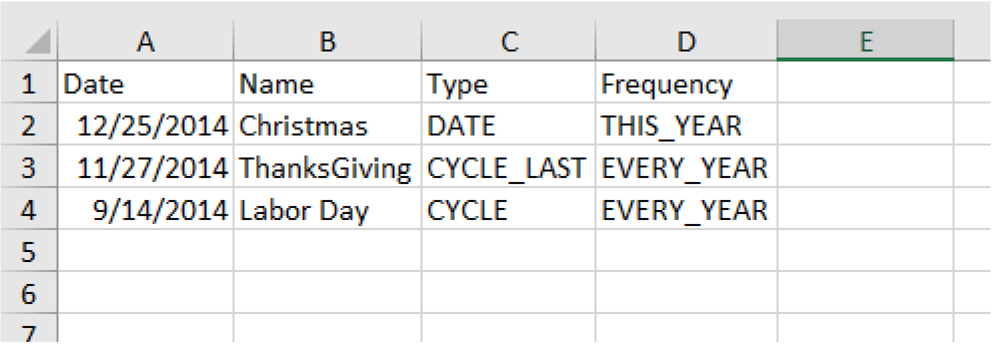
1. **Config Code**: System code used to identify the holiday.
2. **Name**: The name used for the holiday that shows on the calendars.
3. **Date**: The date the holiday occurs this year.
4. **Type**: There are three options: **Date**, **Cycle**, and **Cycle Last**.
   - **Date**: The holiday occurs on the day entered in the date field (example: Christmas is on December 25 every year).
   - **Cycle**: The holiday occurs every year on the same weekday from the start of the month (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 (example: Thanksgiving is the last Thursday of November).
5. **Recurrence**: Set it to **This Year** for the holiday to only occur once. Set is to **Every Year** for the holiday to show every year.
6. **[Save & Back]**: Saves the current settings and returns you to the Holidays Administration page.
7. **[Save]**: Saves the current settings, but keeps you on the Holiday Settings page.
8. **[Cancel]**: Discards the changes and returns you 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**: Choose an Excel XLS file in the proper format that has holiday data you want to import into eProsecutor Online.
2. **Sample**: Download a sample Excel XLS file that has the expected format and a few samples.
3. **[Import]**: Import the holidays from the file into eProsecutor Online.
4. **[Close]**: Close the Import dialog.

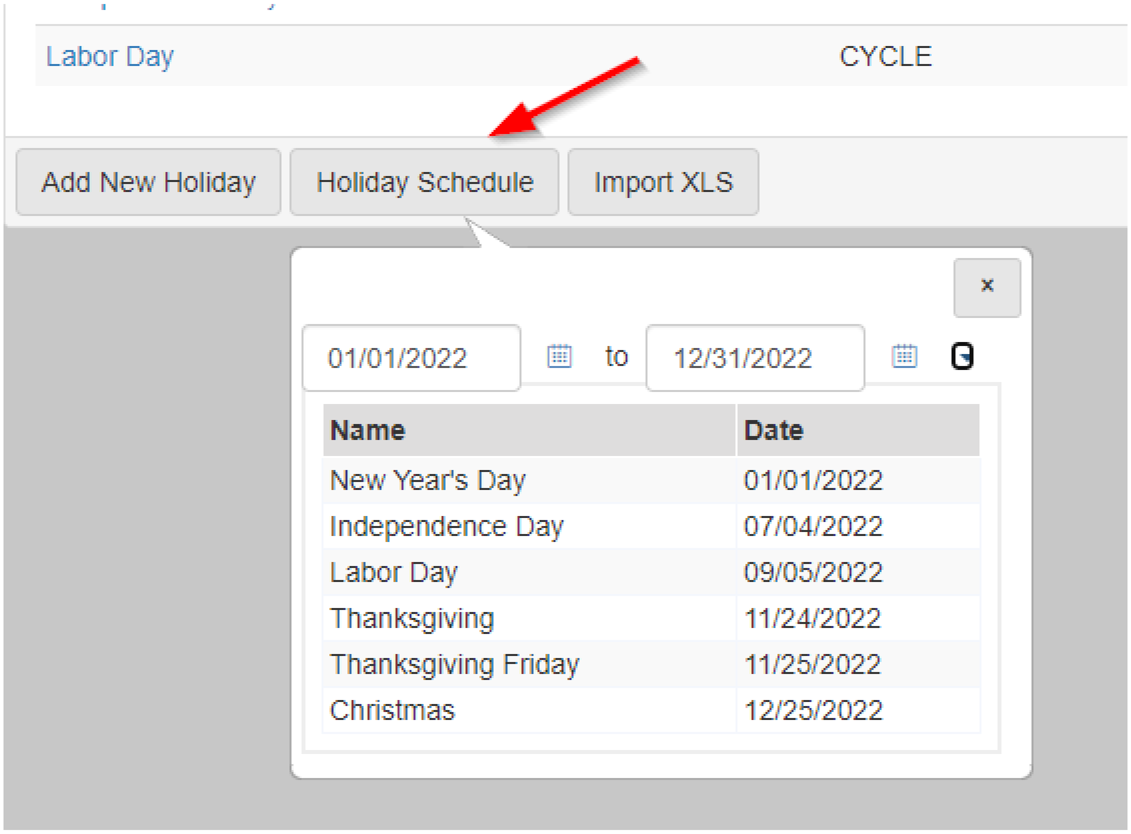


	A	B	C	D	E
1	Date	Name	Type	Frequency	
2	12/25/2014	Christmas	DATE	THIS_YEAR	
3	11/27/2014	ThanksGiving	CYCLE_LAST	EVERY_YEAR	
4	9/14/2014	Labor Day	CYCLE	EVERY_YEAR	
5					
6					
7					

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

Holiday schedule

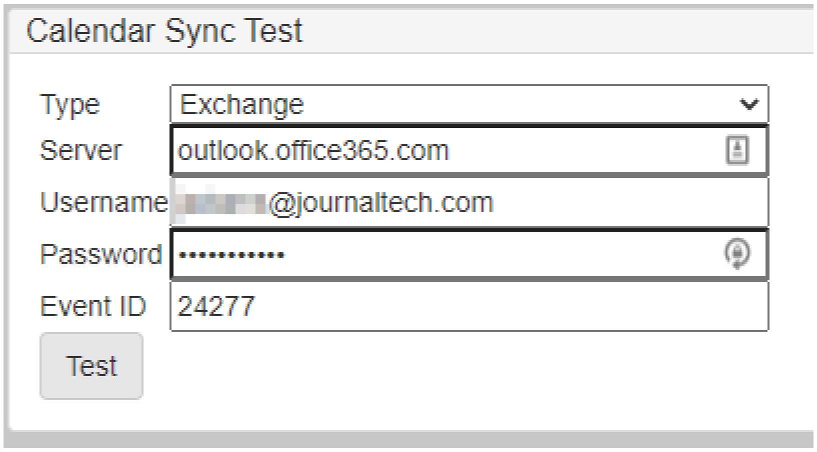
You can view what upcoming holidays there are by clicking **[Holiday Schedule]** button at the bottom of the **Holidays Administration** page.



You can enter a date range and discover the existing holidays 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.

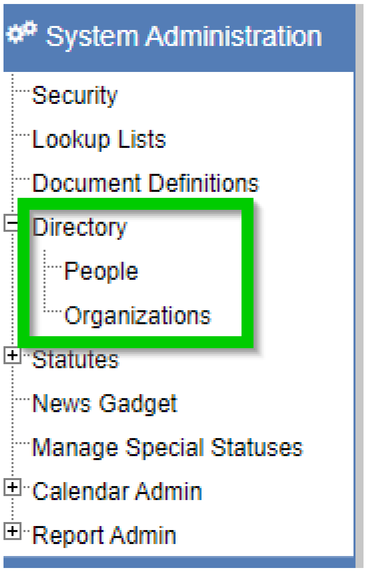


To test how and event syncs to a calendar, you need to fill in the fields with the appropriate data.

- **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 eProsecutor Online that you want to try syncing to the calendar.

Directory

The directory consists of Persons [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html] and Organizations [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/org_unit.html]. Persons [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html] and Organizations [https://documentation.journaltech.com/eProsecutorOnline/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.



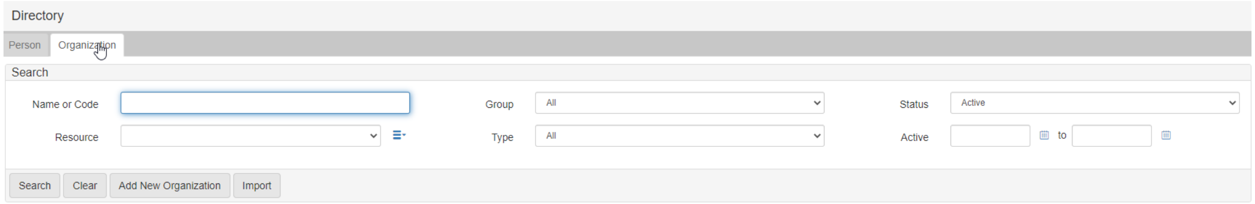
Refer to Directory person for information on how directory persons are used on cases, and added through the **Case** screen.

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.

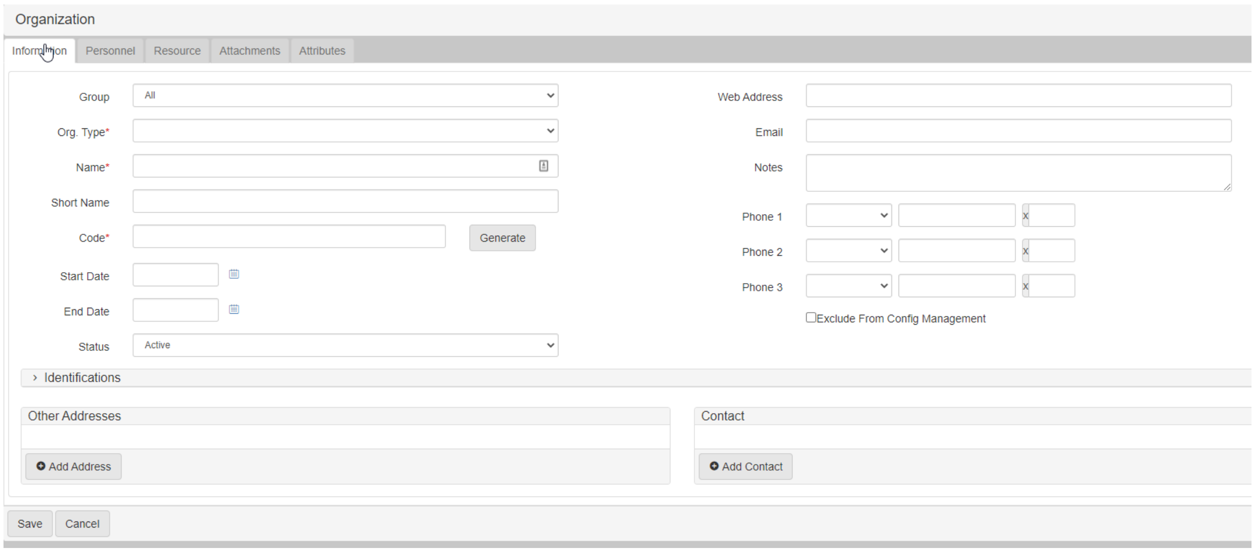
Buttons:

- **[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

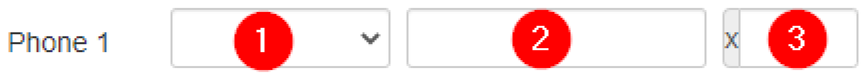
To add a new Directory Organization, click **[Add New Organization]**:



- **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 drop downs in the system.
- **End Date**: Date this organization is no longer available in drop downs in the system.
- **Status**: Defines if the organization is **Active** or **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**:



1. Choose the phone type: **Cell Phone**, **Fax**, **Home Phone**, **Work Phone**.
2. Enter the ten-digit phone number.
3. Optionally enter the extension.

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

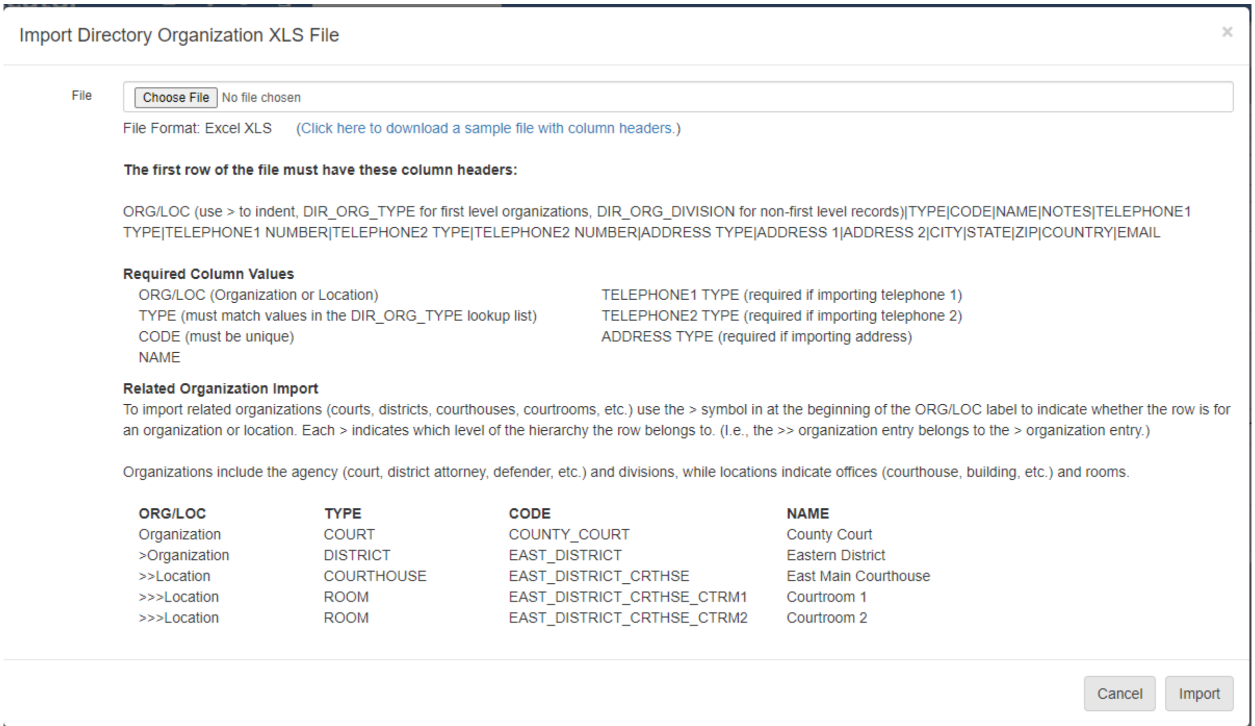
Optional items

Optionally, you can add:

- https://documentation.journaltech.com/eProsecutorOnline/admin/directory/identifications.html for an organization.
- **Address**
- **Contact**
- **Personnel** (https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html)
- **Resources**
- **Attachments**
- **Attributes**

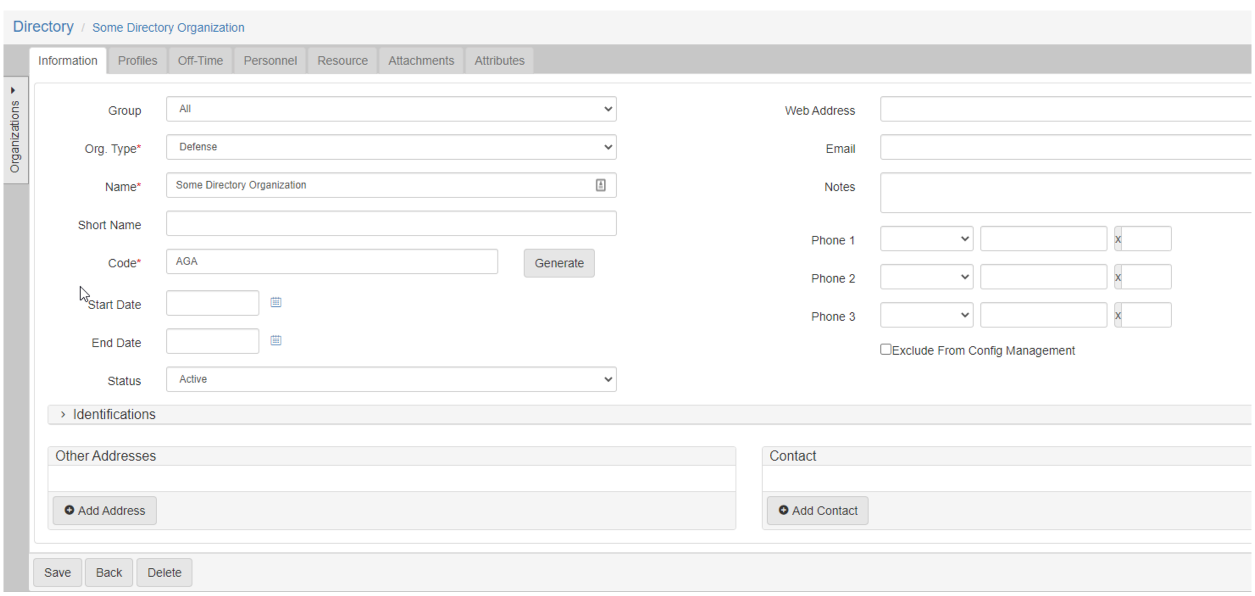
Bulk importing directory organizations

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 drop downs in the system.
- **End Date**: Date this organization is no longer available in drop downs in the system.
- **Status**: Defines if the organization is **Active** or **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**:

    1. Choose the phone type: **Cell Phone**, **Fax**, **Home Phone**, **Work Phone**
    2. Enter the ten-digit phone number.
    3. Optionally enter the extension.

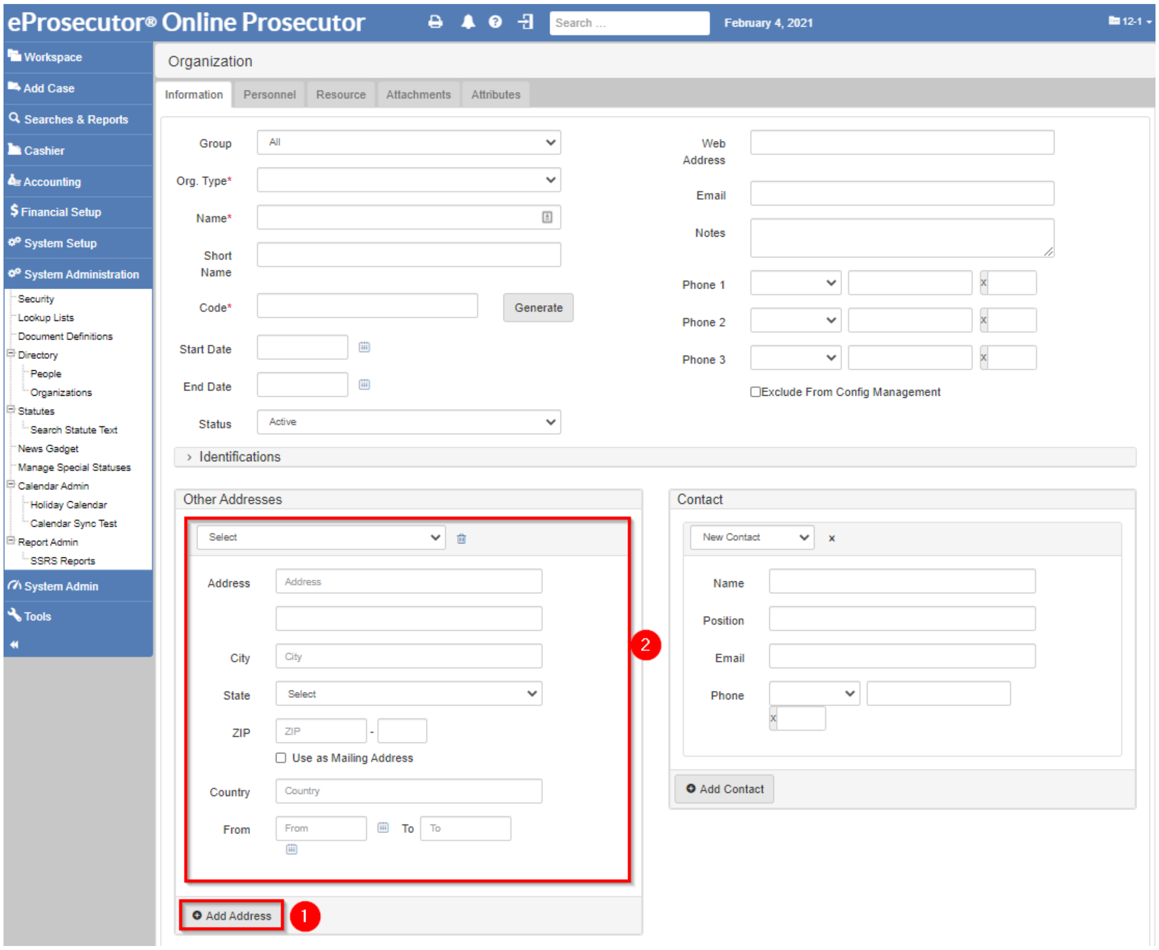
Org. Type, **Name**, and **Code** are all required.

Optional items

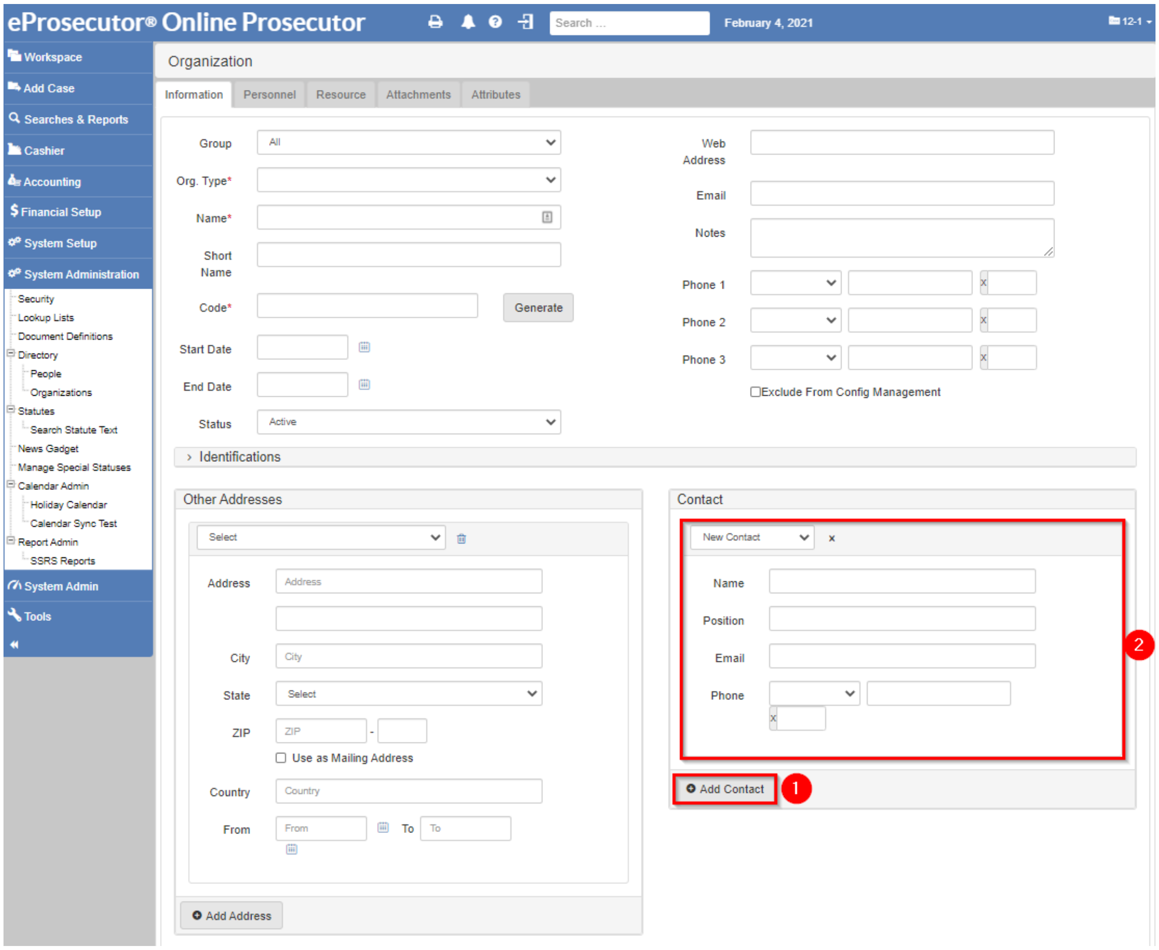
Optionally, you can add:

- https://documentation.journaltech.com/eProsecutorOnline/admin/directory/identifications.html for an organization.
- **Address**
- **Contact**

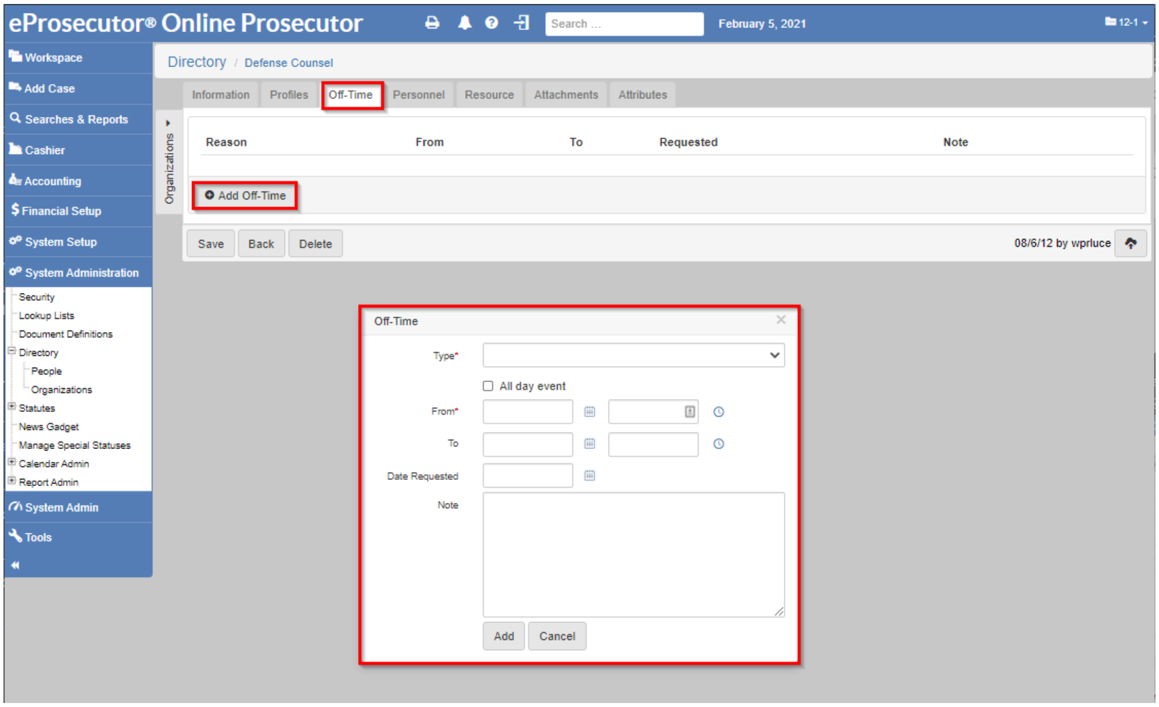
- **Off-time**
- **Personnel** (Directory Persons [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html])
- **Resources**
- Attachments [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/attachment.html]
- Attributes [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/attribute.html]
    - **Addresses**: Click **[Add Address]** (1) and fill in the form (2):



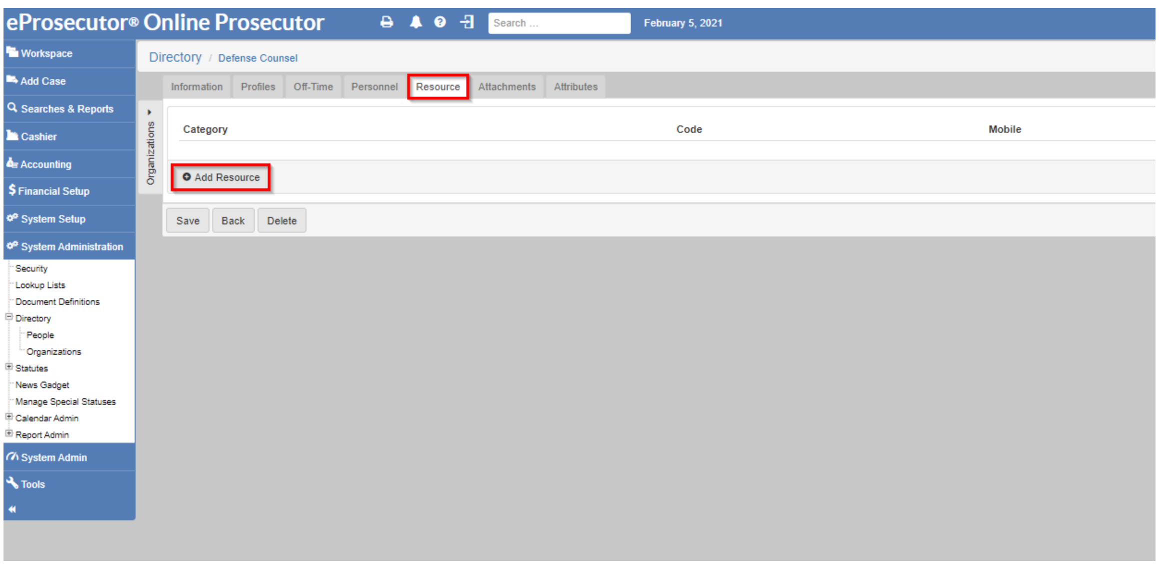
    - **Contact**: Click **[Add Contact]** (1) and fill in the form (2):



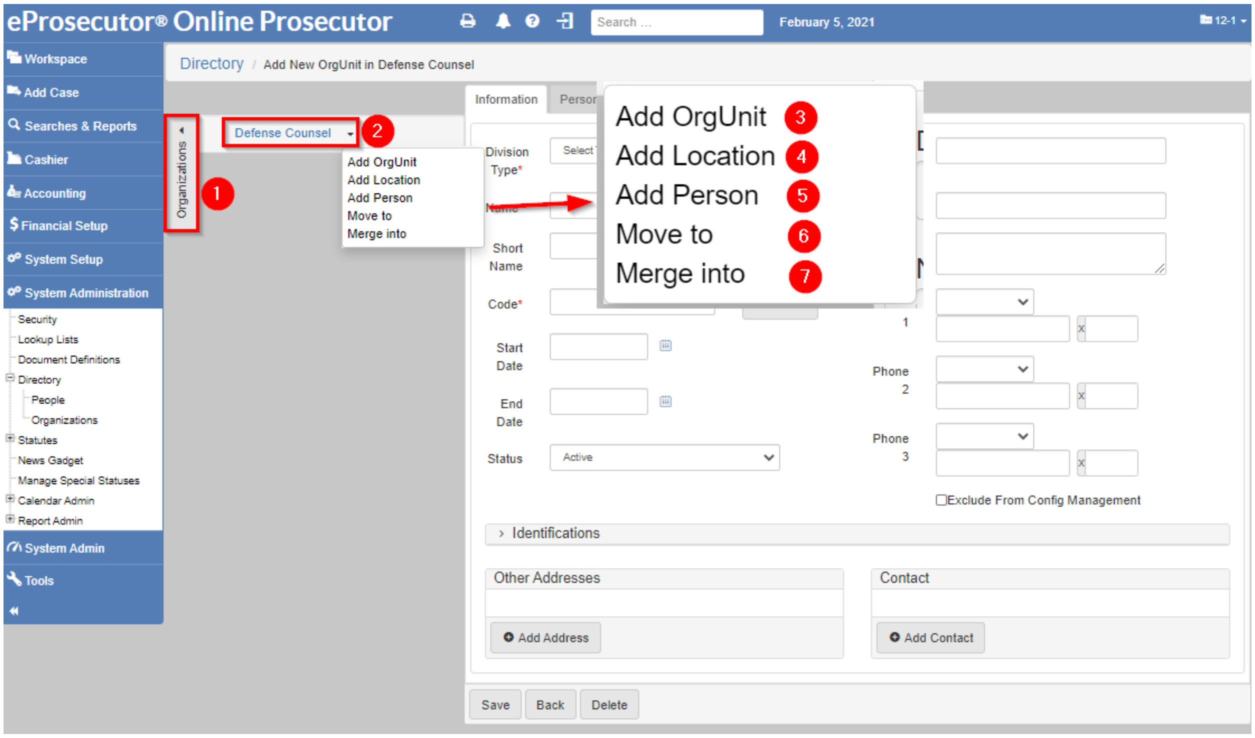
- **Off-Time**: Select the **Off-time** tab, then click **[Add off-time]**.



- **Resources**: Select the **Resources tab**, then click **[Add Resource]**.



Directory organization management



Move an organization

An **Organization** can be moved to a different parent organization.

1. Select **Organizations**, on the right side of the left navigation (1).
2. In the **organization** dropdown (2), select **Move to** (6).
3. Select the new parent **Organization** or **Location** from the dialog.
4. The **Organization** can be found under the **Organization** in the **Organization** tree.

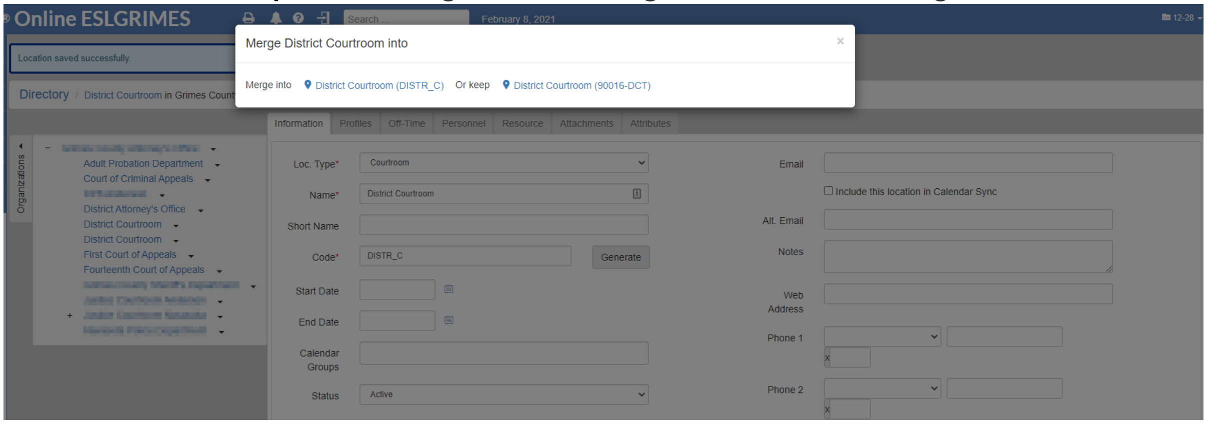
This feature allows you to mimic the personnel hierarchy of an organization or the physical structure of a building.

Merge organizations

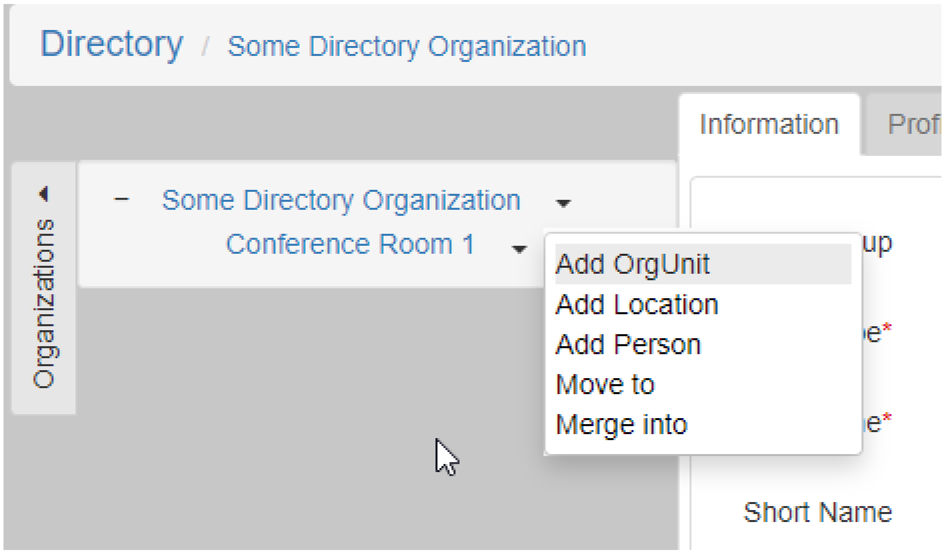
When two organizations have the same name, you can use a merge operation to combine them into one.

1. Select **Organizations**, on the right side of the left navigation (1).
2. In the **organization** dropdown (2), select **Merge into** (7). A dialog opens asking how to merge the organizations.
3. Click one of the merge options:
    a. Click the **Merge into** link to merge this organization into the other organization.

b. Click the **Or keep** link to merge the other organization into this organization.



Also, one can create more organization details 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

An **OrgUnit**, short for "Organization Unit," is a subordinate organization in an organization. They can be used to represent divisions, departments, or other subgroups.

To add an **OrgUnit**:

1. Select **Organizations**, on the right side of the left navigation (1).
2. In the **organization** dropdown (2), select **Add OrgUnit** (3).
3. Fill in the form that shows and click **[Save]**. The new **Orgunit** is under the **Organization** in the **Organization** tree.

Add a location

You can add multiple locations to an organization:

1. Select **Organizations**, on the right side of the left navigation (1).
2. In the **organization** dropdown (2), select **Add Location** (4).
3. Fill in the form that shows and click **[Save]**. The new **Location** can be found under the **Organization** in the **Organization** tree.

Add a person

You can add a person directly to a directory organization:

1. Select **Organizations**, on the right side of the left navigation (1).
2. In the **organization** dropdown (2), select **Add Person** (5). The **Add New Directory Person** screen shows.

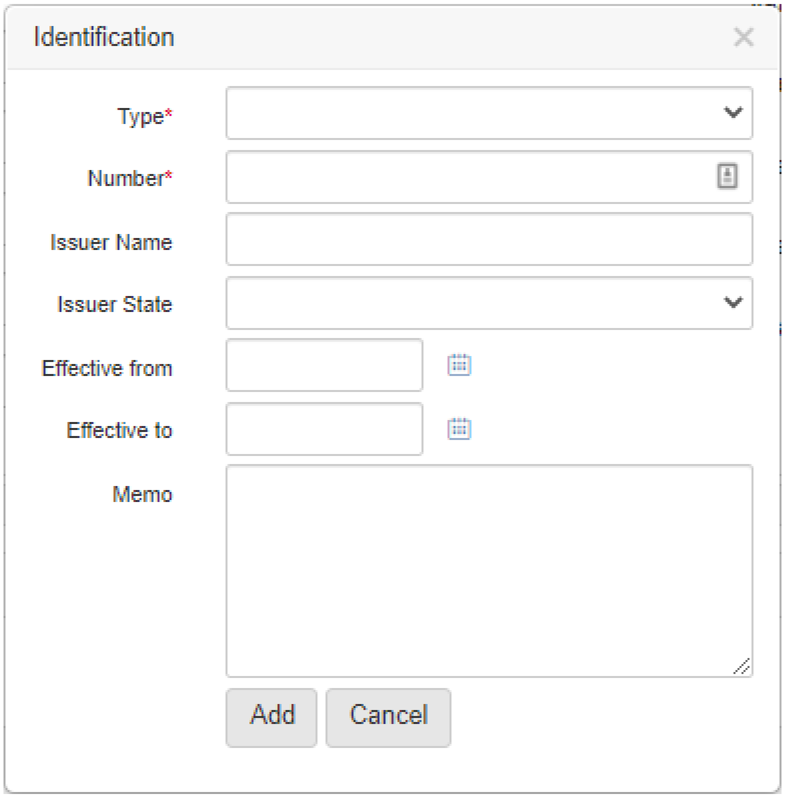
> For more information on Directory Person, refer to https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html.

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.
- **Issuer Name**: name of the issuing organization.
- **Issuer State**: state of issuance.
- **Effective from**: date identification is effective from, typically the issuance date.
- **Effective to**: date identification is effective to, typically the expiration date.
- **Memo**: enter anything of note about the identification.

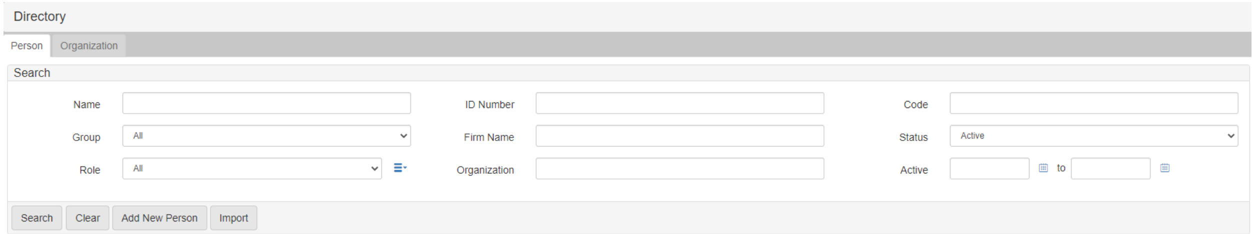
Update an identification

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.

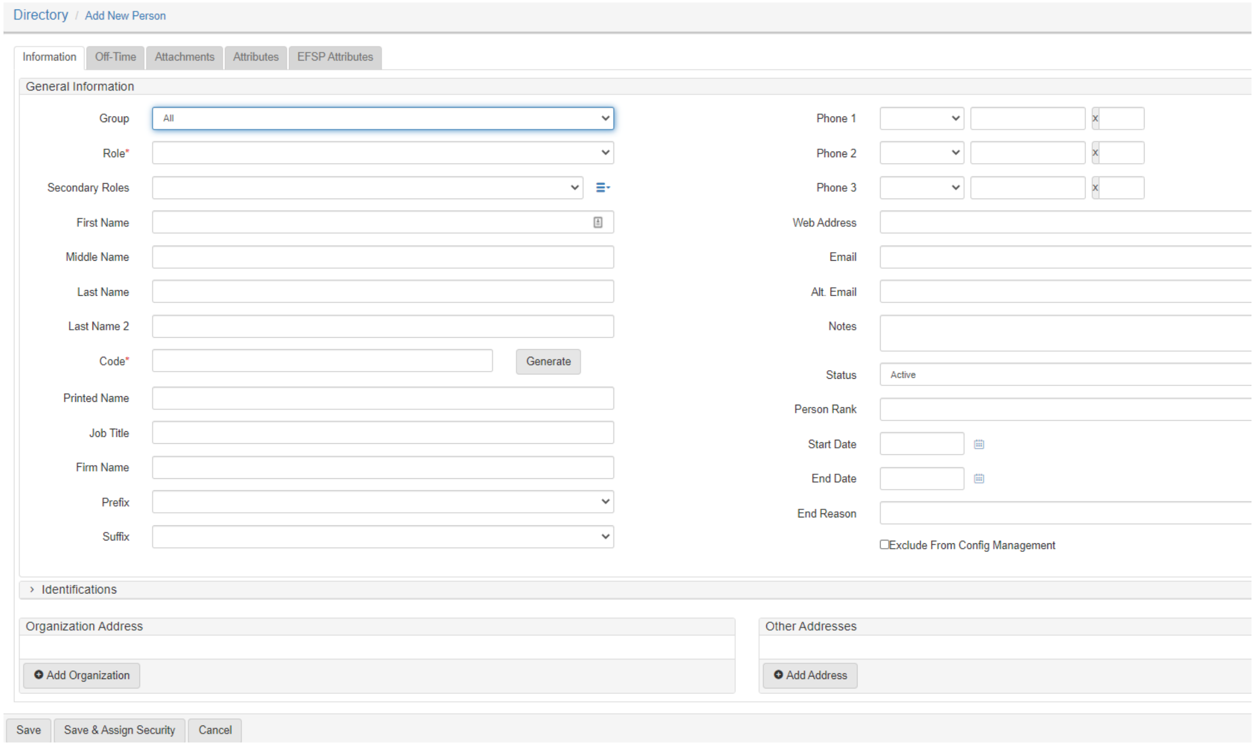
Buttons:

- **[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.

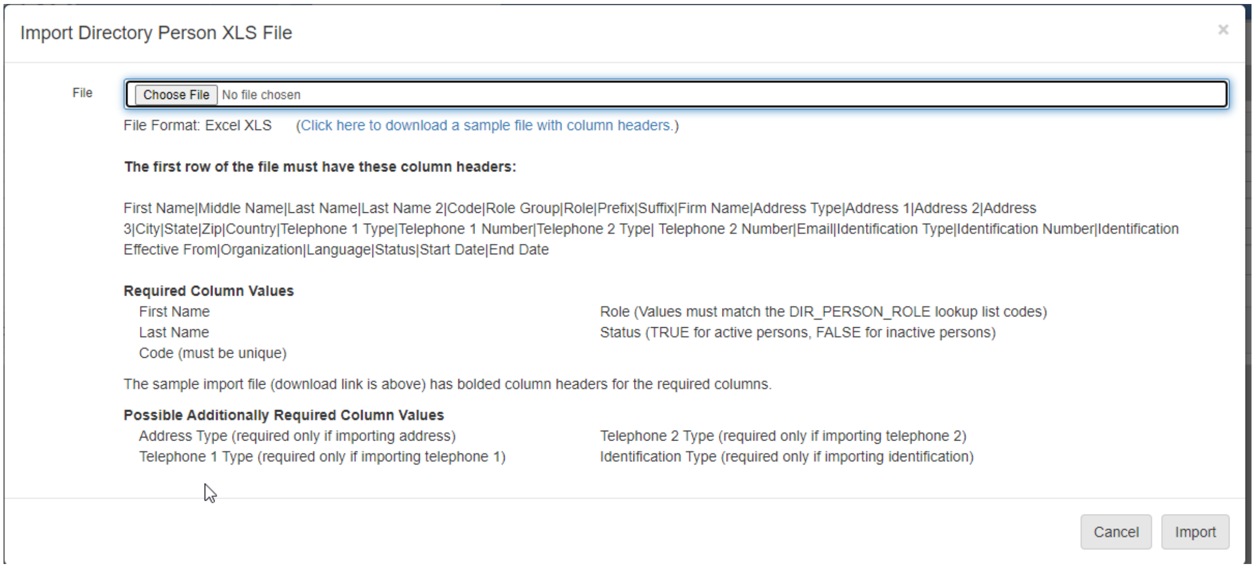
Optional items

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

- Identifications
- Addresses [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/addresses.html]
- Off-Time [https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/off_time.html]
- Attachments
- Attributes

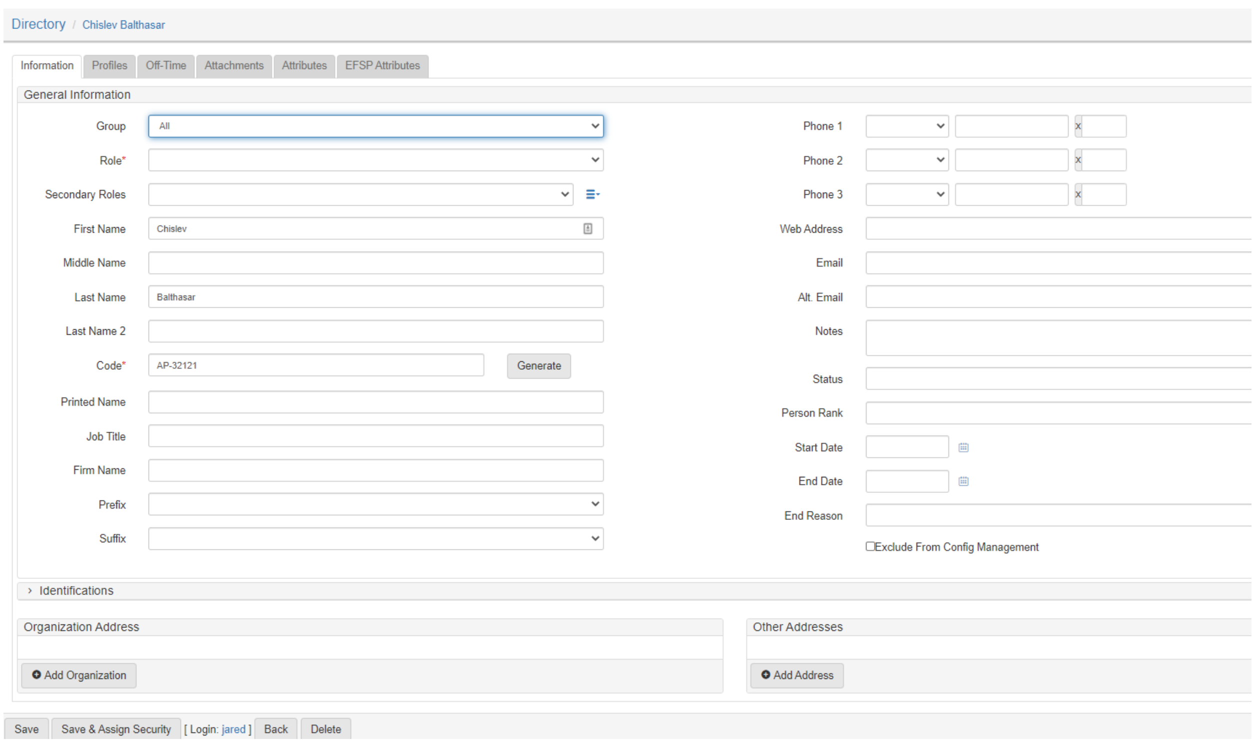
Bulk import directory persons

Clicking **[Import]** provides 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, 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.

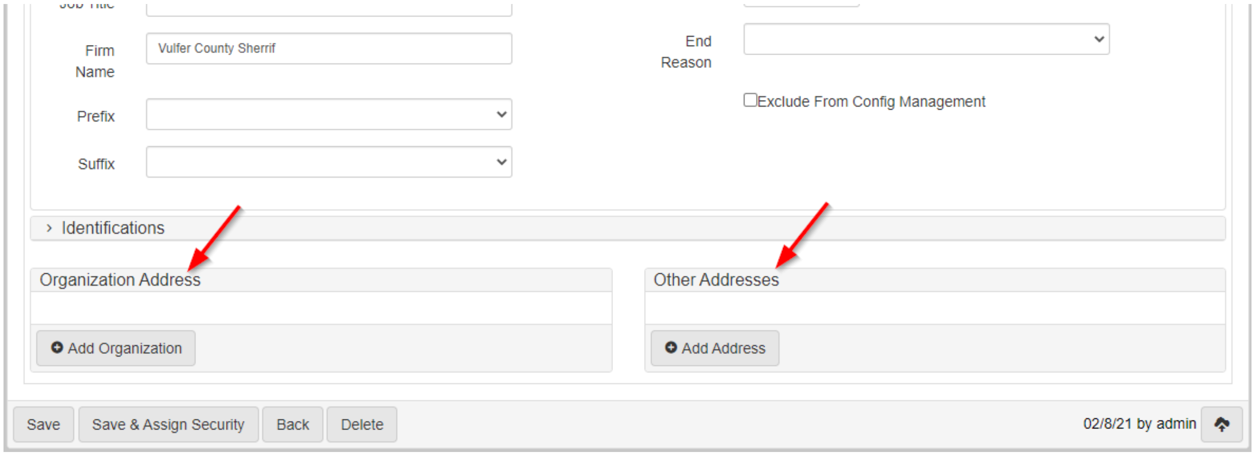
Optional items

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

- Directory person and directory organization identifications
- https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/addresses.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/off_time.html
- Directory person and directory organization attachment
- Directory person and directory organization attributes

Directory organization and other addresses

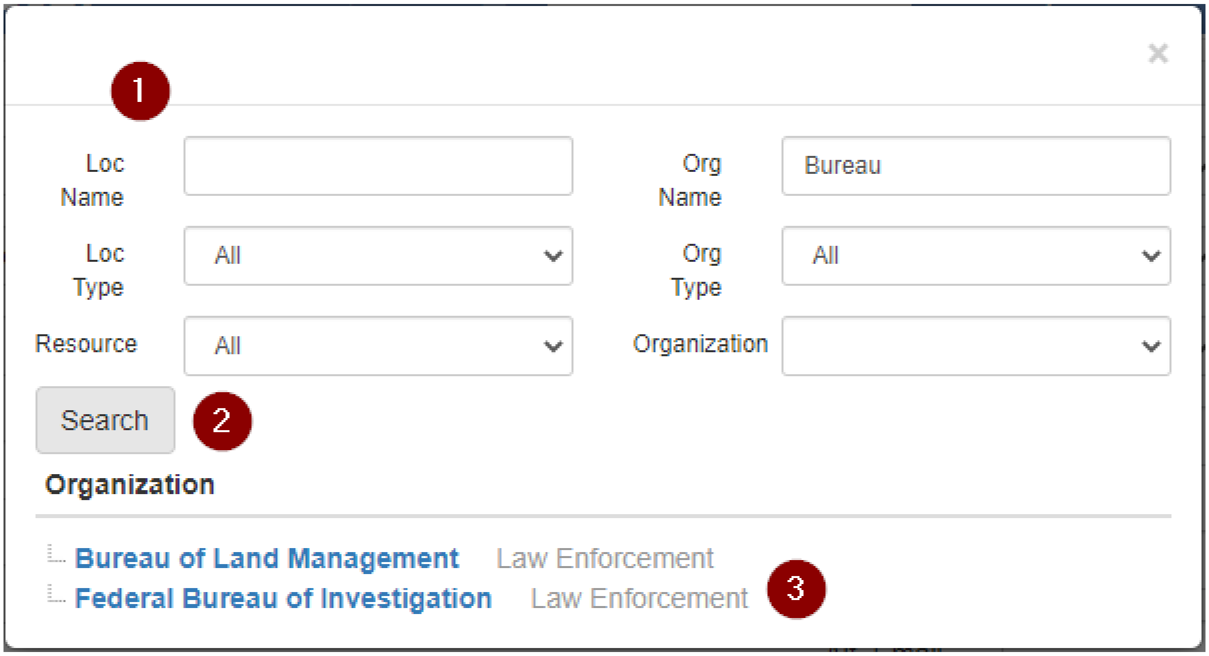
At the bottom of the https://documentation.journaltech.com/eProsecutorOnline/admin/directory/person/index.html screen, addresses can be associated with the person record. An **Organization Address** or **Other Address** can be added:



Organization addresses

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

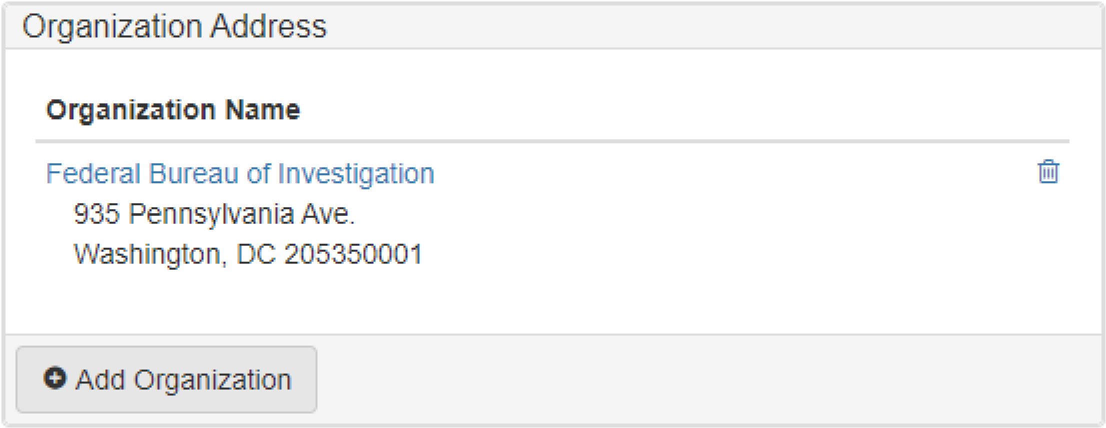
To add a person to an organization, click **[Add Organization]**. This shows the **Organization Search** dialog:



In the dialog:

1. Enter the search criteria for the organization you want to add.
2. Click **[Search]**
3. Click the organization link in the search results.

After clicking the organization in the search dialog, the organization shows in the **Organization Address** panel:

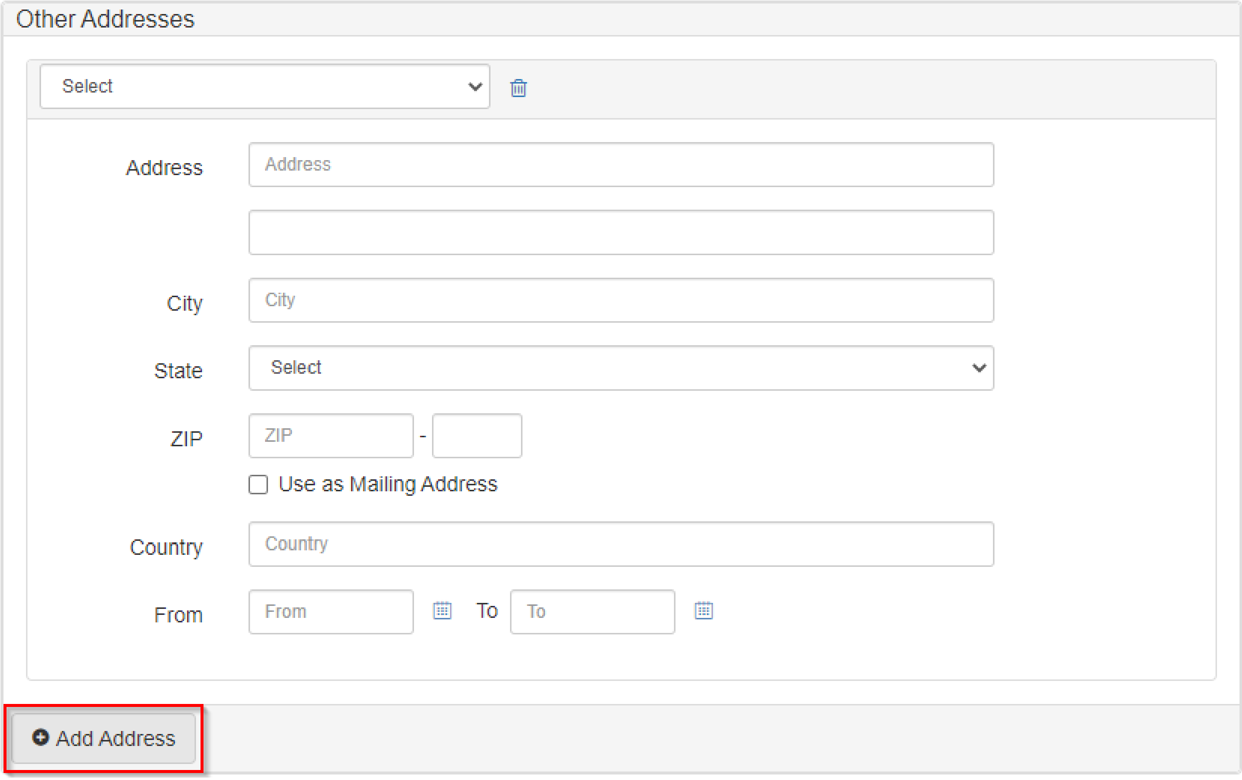


After adding the organization, click **[Save]** on the **Directory Person** record to save the changes.

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.



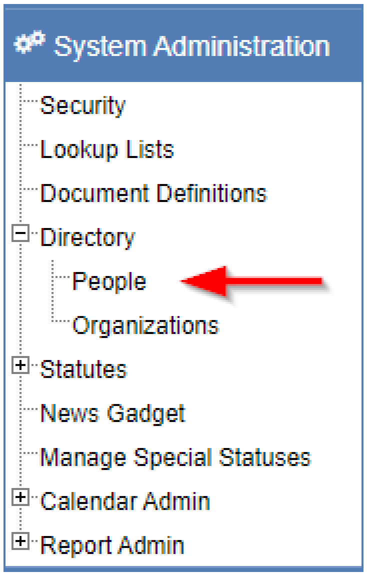
Enter the information for the address, then click **[Save]** on the **Directory Person** record.

Directory off-time

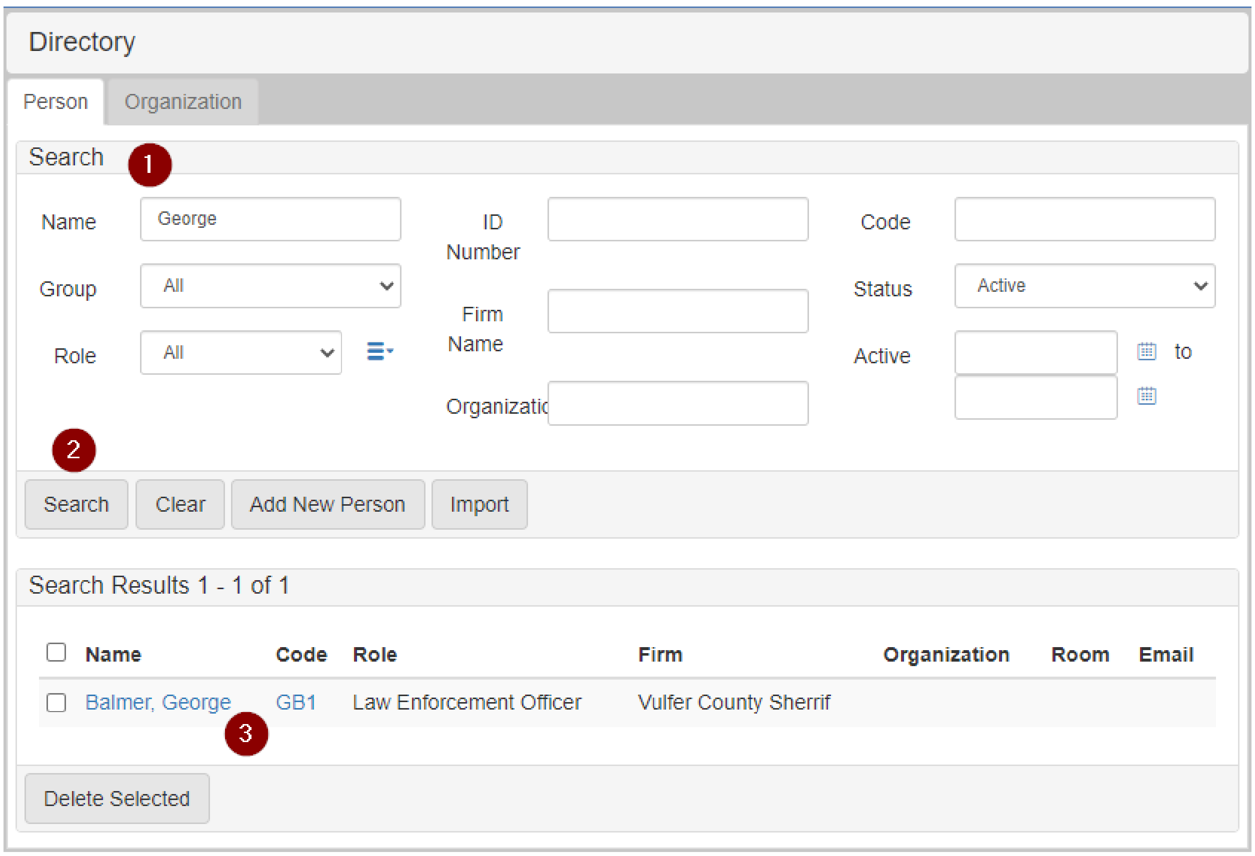
Off-time is a way to track when a **Directory Person** is off of work. This may include sick leave, schedule vacation, or other reasons.

Navigate to directory person off-time

To view or schedule off-time for a **Directory Person**, navigate to **Left navigation › System Administration › Directory › People**.

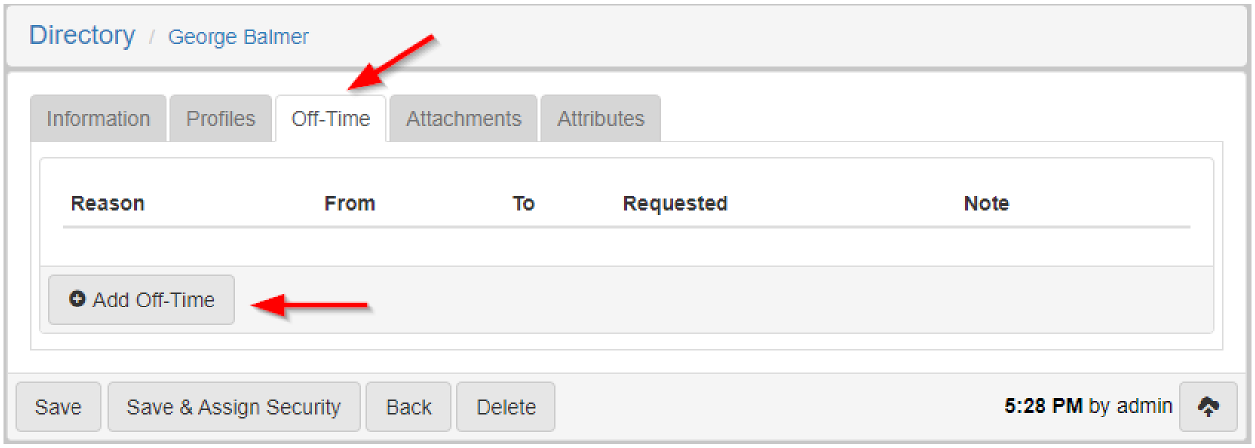


After navigating to the **Directory Person Search** screen, enter the criteria for the individual you are trying to find (1), click **[Search]** (2), then click the name of the individual:

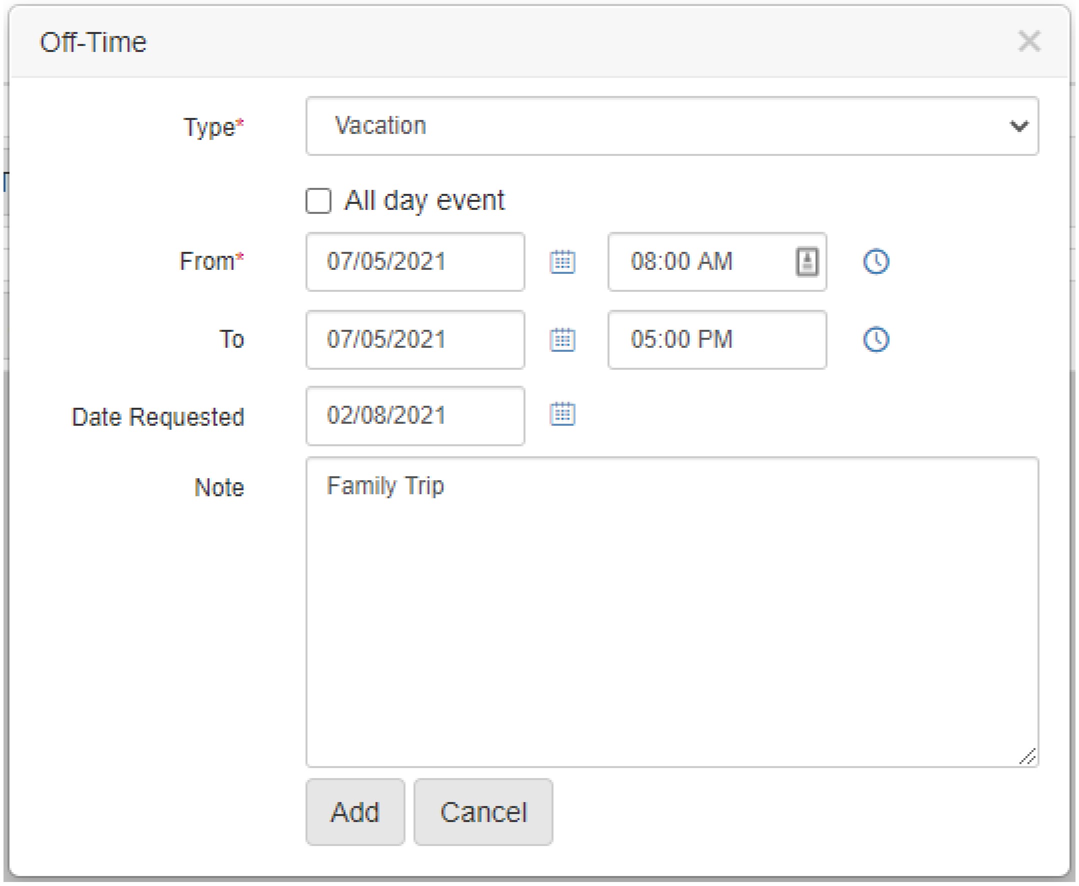


View and add off-time

After clicking a name, the **Directory Person Edit** screen shows. Click **[Off-Time]** 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, then click **[Add]**. The new entry shows on the **Off-Time** tab.

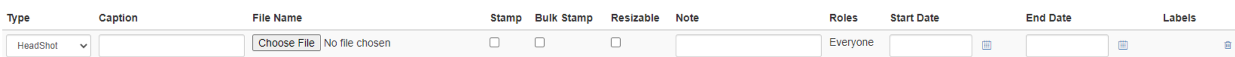
Off-Time shows on the calendar for that **Directory Person**.

Directory person and directory organization attachment

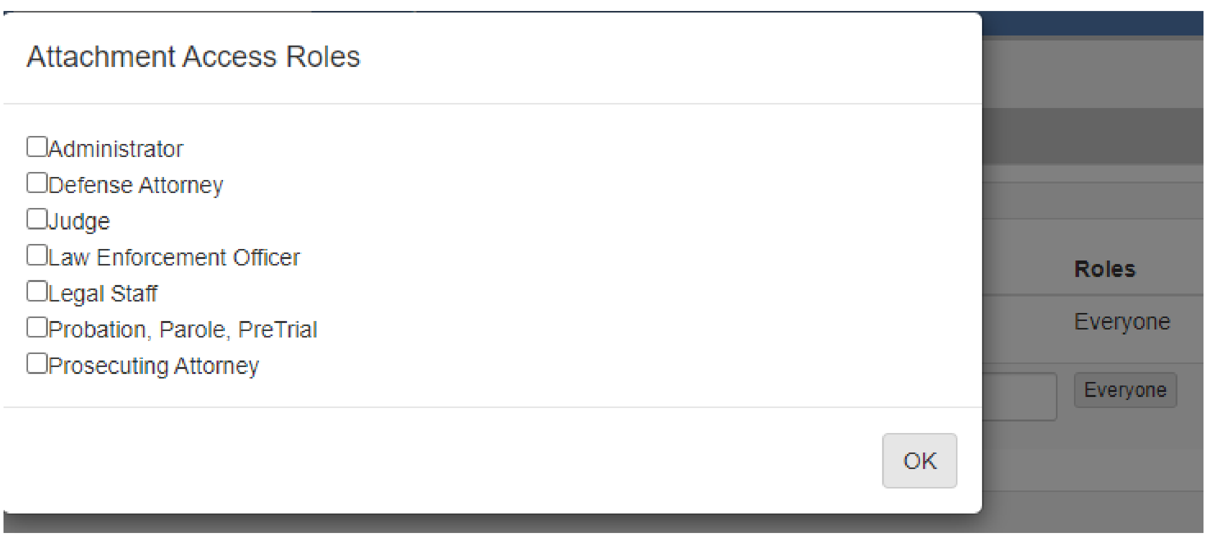
Attachments are documents and images associated with a person or organization. Generally this is used for things like an agency seal or logo, bail bond license, proof of residency, head shot of a person or stamp for document stamping.

Add an attachment

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



- **Type**: select the type for the attachment.
- **Caption**: enter a caption for the image.
- **File Name**: click **[Choose File]** to select a file.
- **Stamp**: defines this attachment as a stamp usable by the agency or **Directory Person**.
- **Bulk Stamp**: defines this as a stamp usable in scanning utilities.
- **Resizable**: allows the stamp to be resized.
- **Note**: enter note about the file.
- **Roles**: select the roles that have access to this attachment. Click to open a dialog with available roles. If you select none, then it defaults to **Everyone**.

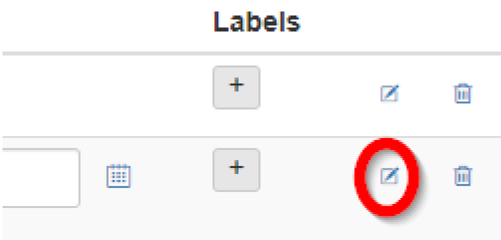


- **Start Date**: first date image is usable.
- **End Date**: last date image is usable.
- **Labels**: add labels to organize or group attachments.

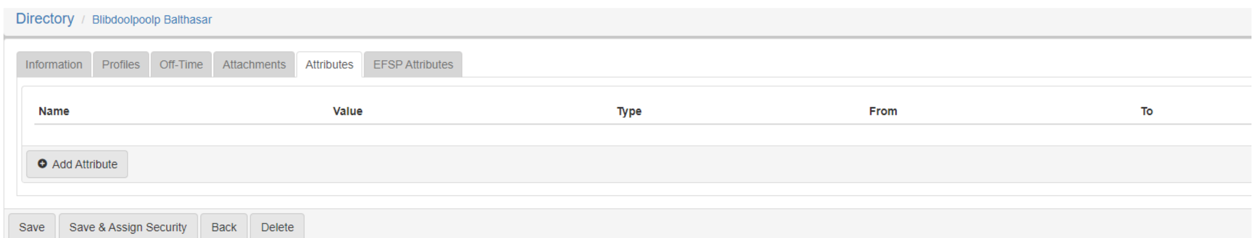
Creating a stamp and selecting the **Stamp** field is a critical step of the digital signature process.

Update an attachment

Click the edit attachment icon at the end of the row to make the fields editable. Make the required changes, then click **[Save]**.

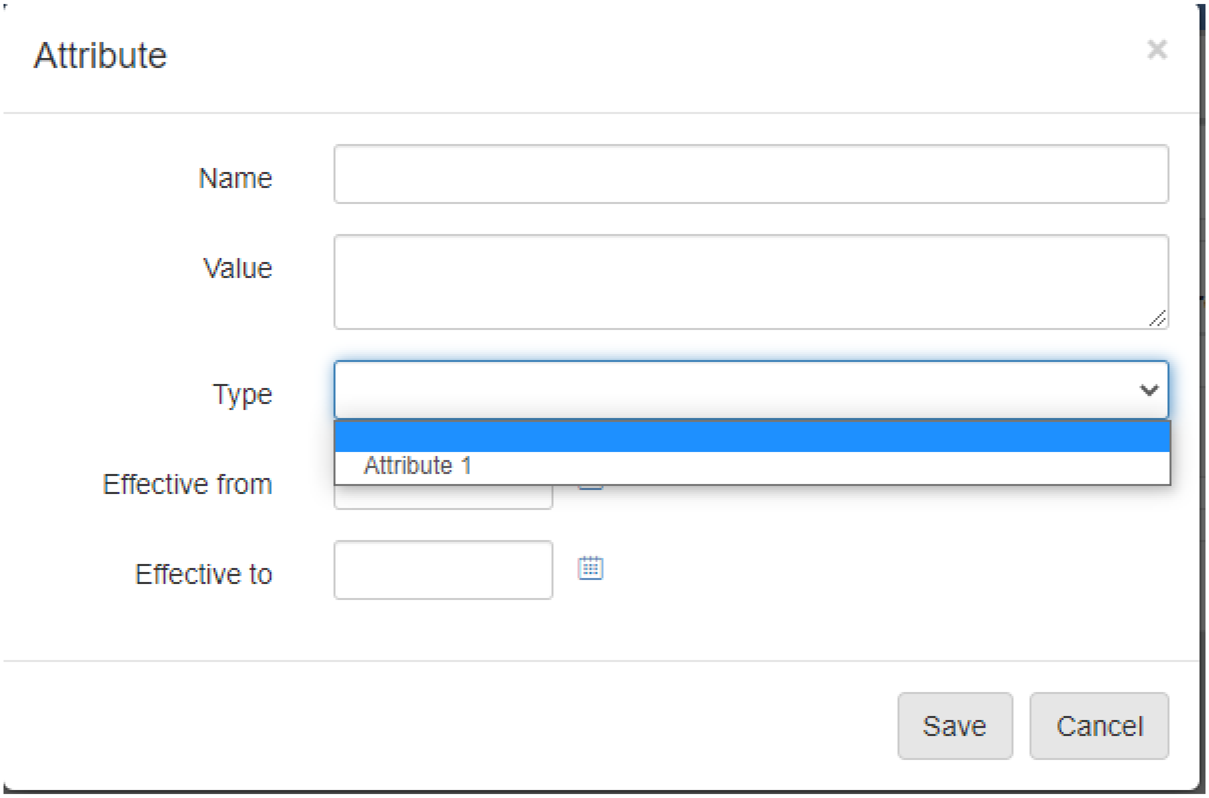


Directory person and directory organization attributes



Add an attribute

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



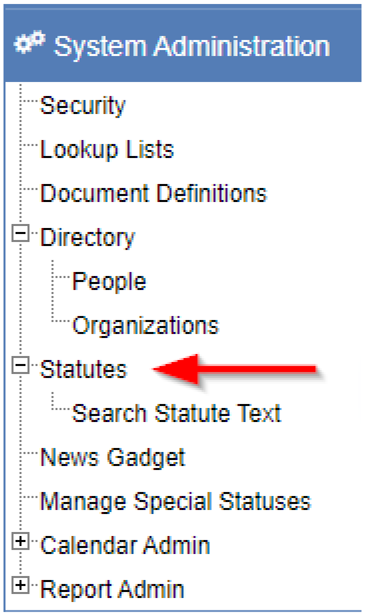
- **Name**: description of the attribute.
- **Value**: value of the attribute.
- **Type**: type of the attribute.
- **Effective from**: first date this attribute is effective.
- **Effective to**: last date this attribute is effective.

Update an attribute

Click the **Name** of the attribute. This opens the **Update Attribute** form.

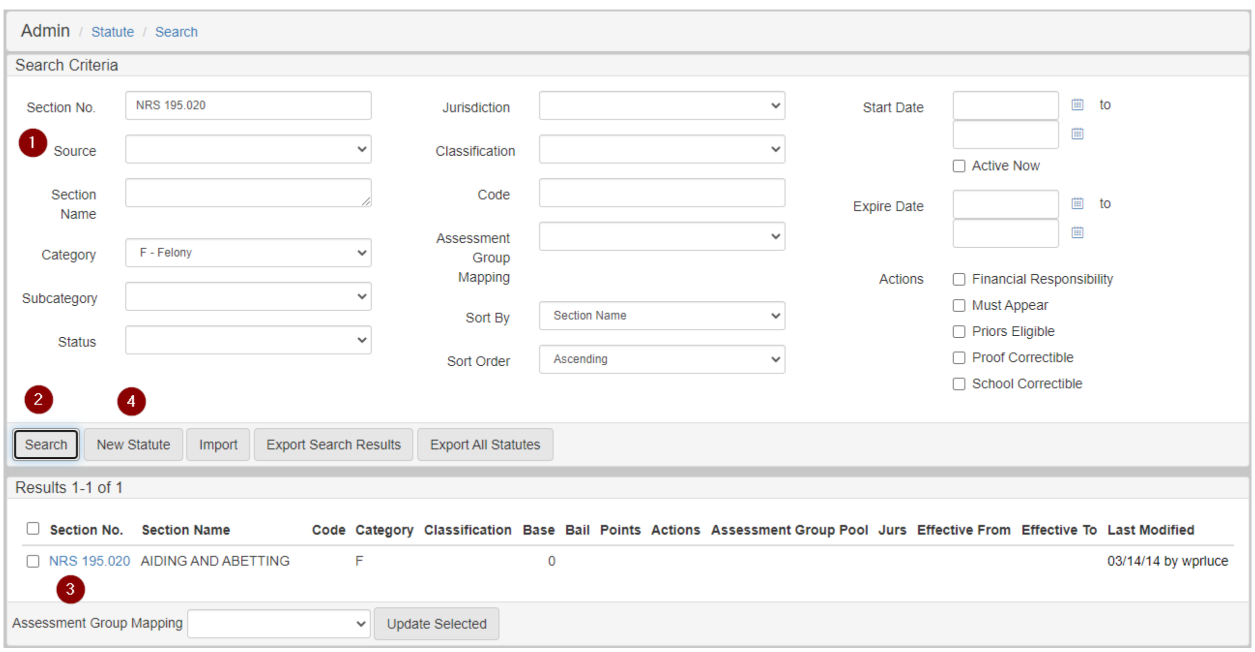
Statutes

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 **[Search]**. Search results are shown in the bottom section.
3. Click a **Section No.** link in the search results to edit the section.
4. Click **[New Statute]** to create a new statute.

Search results

Statutes include these main parts listed in statute search results, plus other information:

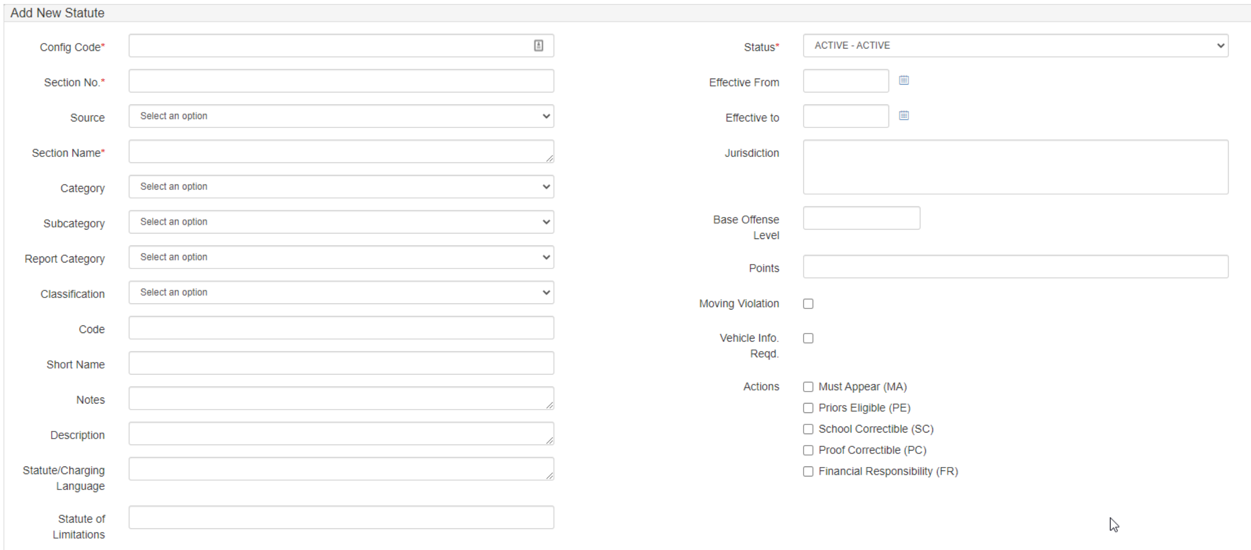
- **Section Number**
- **Section Name**
- **Short Name**
- **Code**
- **Category**
- **Classification**

Adding and editing a statute

Add a new statute by clicking **[New Statute]** in the Statute Search screen.

Edit an existing statute by clicking **Statute No.** link in the search results of the Statute Search screen.

The following options are available when adding or editing a statute:



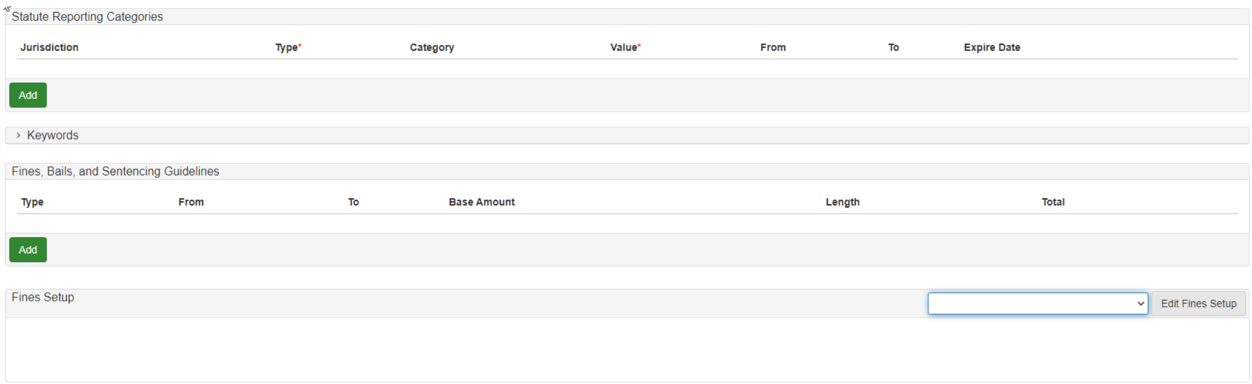
Among these options, **Config Code**, **Section Number**, and **Status** are required, while **Config Code** must also be unique.

Lookup lists

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

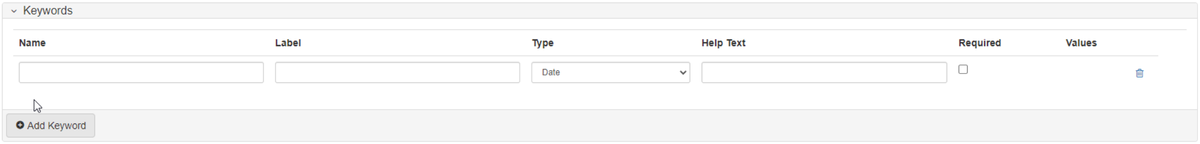
Statute field	Lookup List name
Source	STATUTE_SOURCE
Category	STATUTE_CATEGORY
Subcategory	STATUTE_SUBCATEGORY
Report Category	STATUTE_REPORT_CATEGORY
Classification	STATUTE_CLASSIFICATION

Collection fields

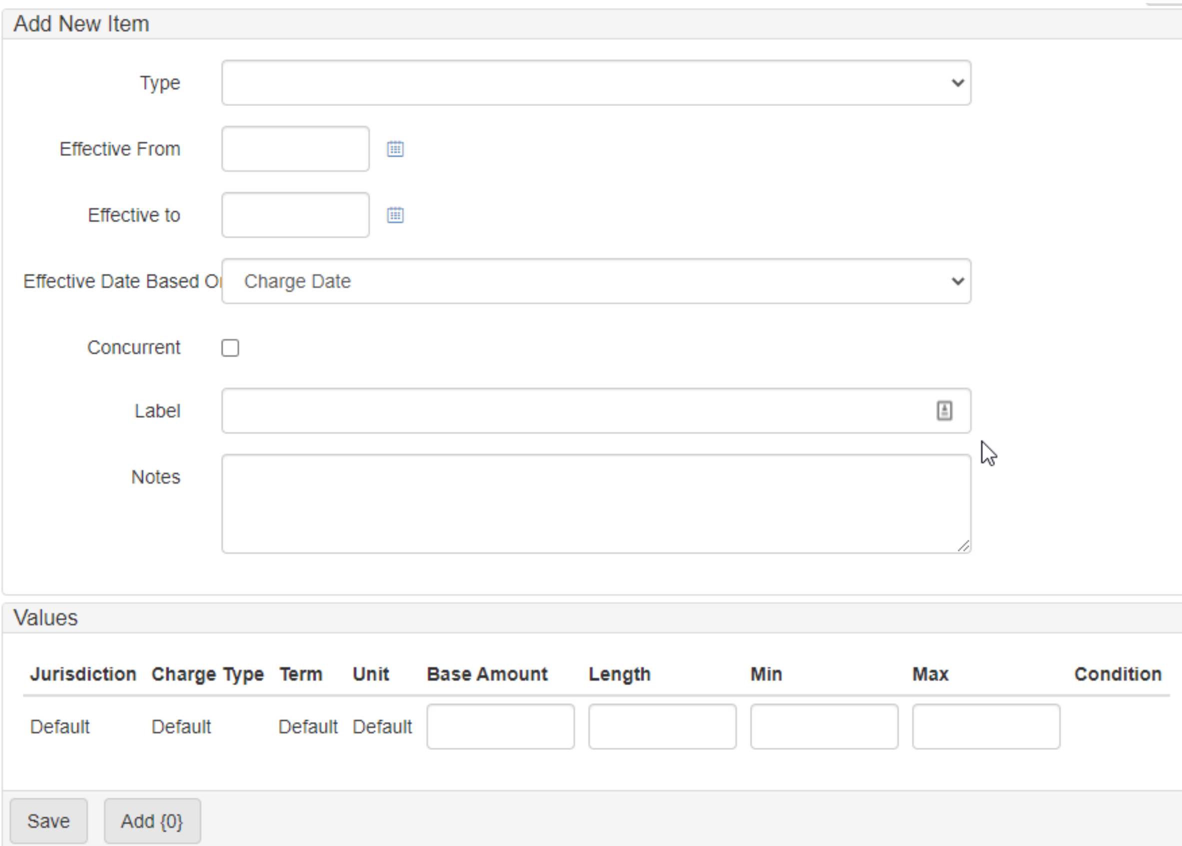


Collection fields available on a statute consist of the following entity types and are configured in the panels on the **Add Statute** screen:

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



- Fines, Bails, and Sentencing Guidelines:



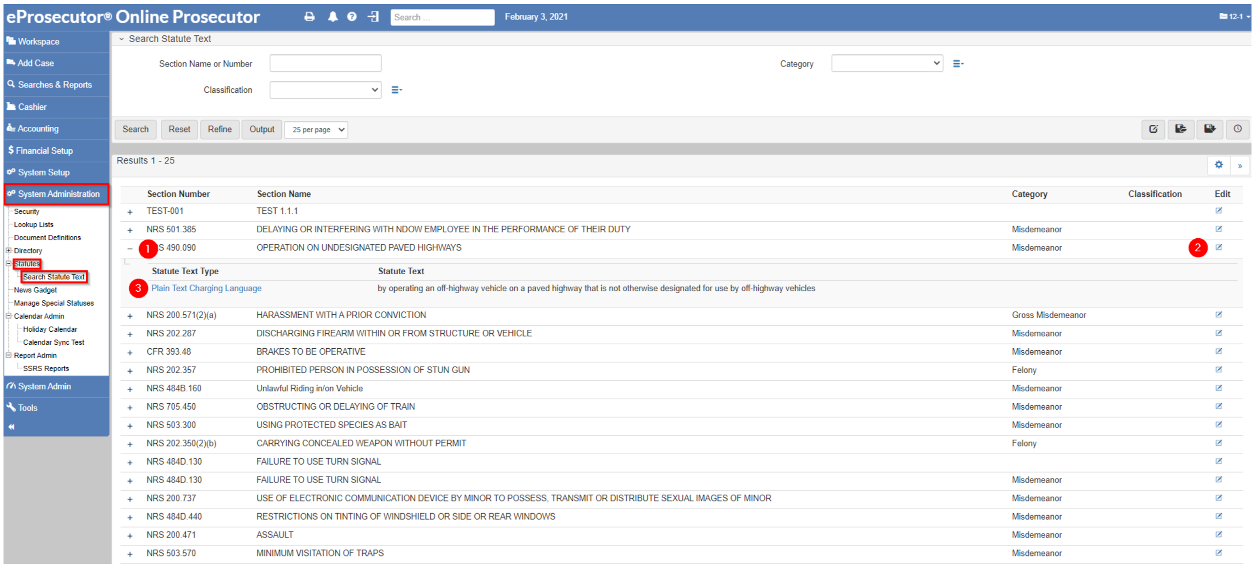
For information on adding statute texts, refer to https://documentation.journaltech.com/eProsecutorOnline/admin/statute_text.html.

Statute text

Statute text can be found in **Left navigation › System Administration › Statutes › Search Statute Text**.

Searching for statute text

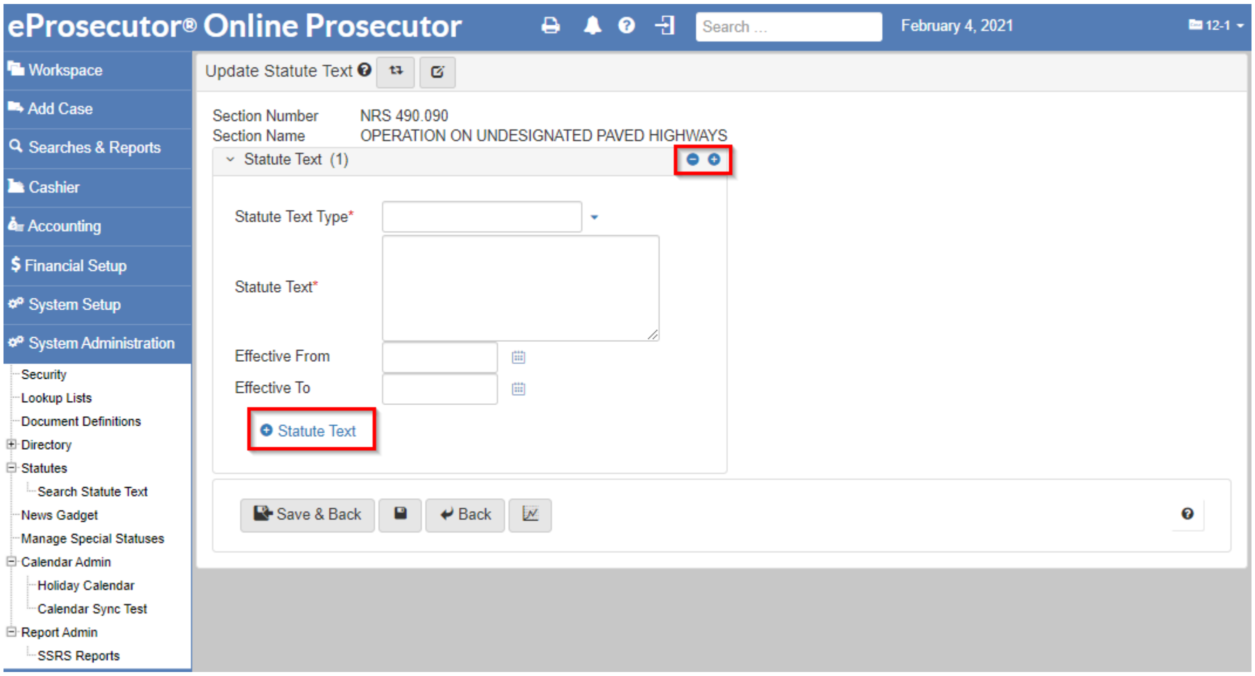
Statute texts can be found by searching for a section name or number of a statute. When the search is applied, a filtered list of statutes is shown. To toggle the view of statute texts on a statute, simple click the plus or minus icon (shown as 1) next to the section number:



Add or change statute text

Statute text can be changed directly by clicking the **Statute Text Type** label next to an expanded statute (shown as 3). Statute text can also be edited or changed by clicking the edit icon next to the statute (shown as 2).

Click the edit icon shows the **Update Statute Text** screen. On the **Update Statute Text** screen, texts can be added or removed by clicking the + and - icons next to the text. Or statute texts can be added by clicking **[Statute Text]** at the bottom of each statute text.

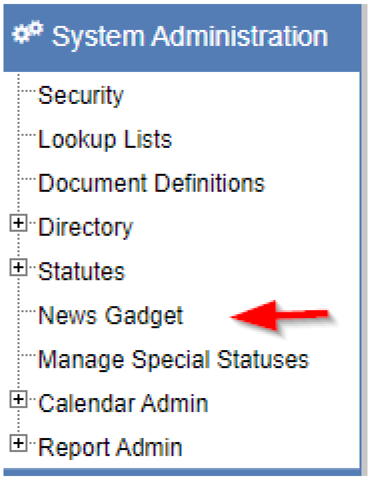


News gadget configuration

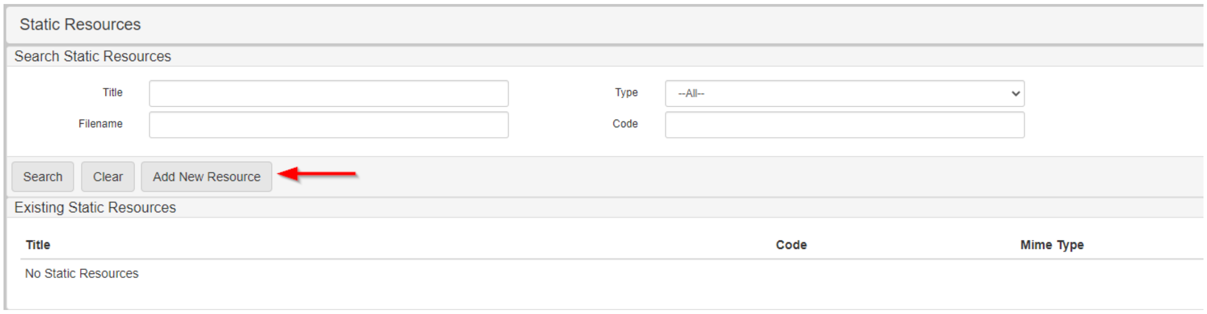
The **News Gadget** shows a message from administrators on user dashboards. To learn how users can add the gadget to their dashboards, refer to News gadget.

How to change the news gadget content

1. Navigate to **Left navigation › System Administration › News Gadget**.

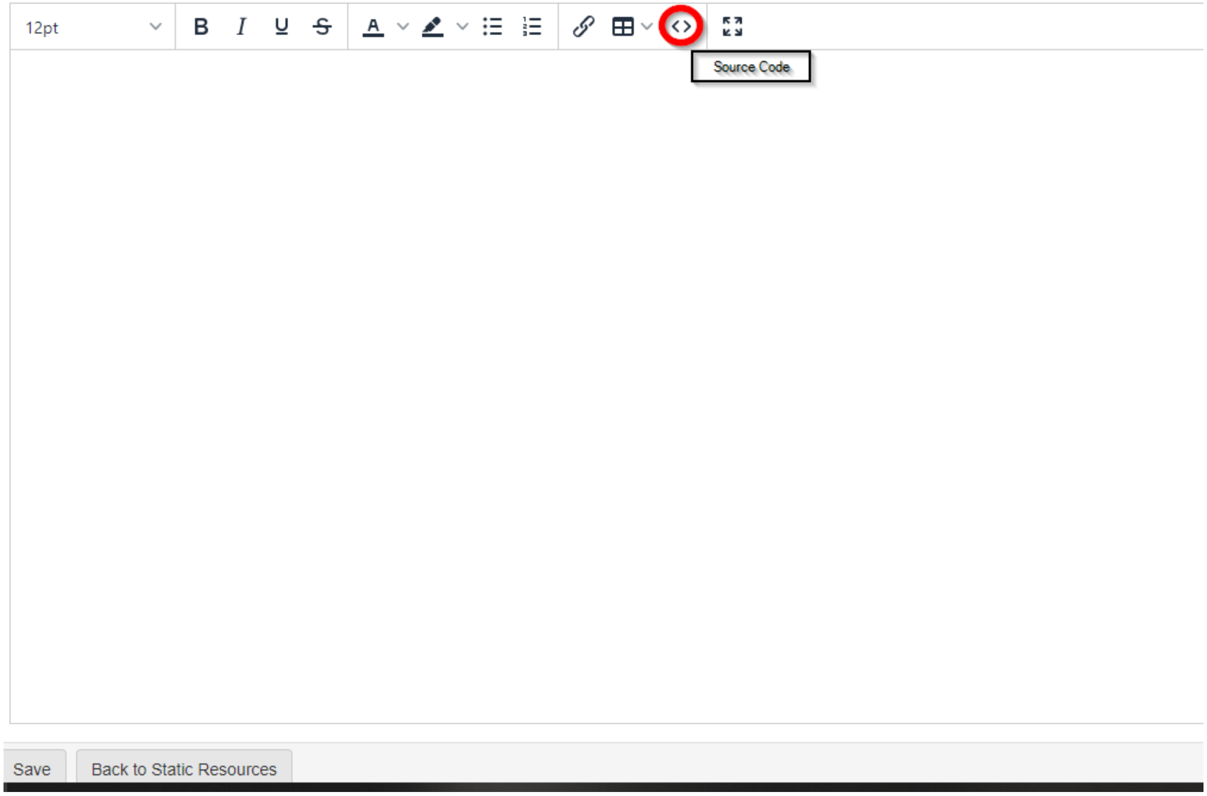


2. This opens the **Search Static Resources** form. Click **[Add New Resource]** button.



3. Give the resource a **Title**, and enter `SYSMSG` as the code. Leave the **Type** as **HTML**.

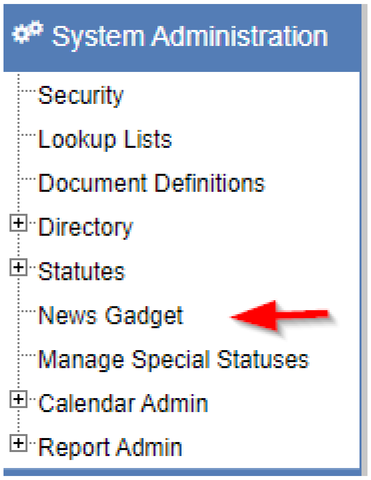
4. In the text box, enter the message you want to shows in user dashboard news gadgets. This is a WYSIWYG (What You See Is What You Get) editor, with a toolbar that allows for formatting items, inserting tables or links. You can also click the source code button, circled in red, to edit the HTML directly. This must be done if adding an image. See Add images to news gadget.



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

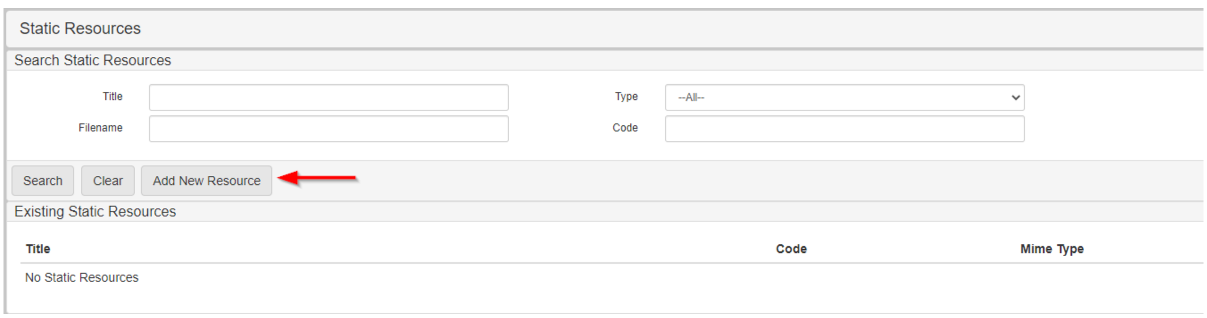
Add images as a static resource

1. Navigate to **Left navigation › System Administration › News Gadget**.



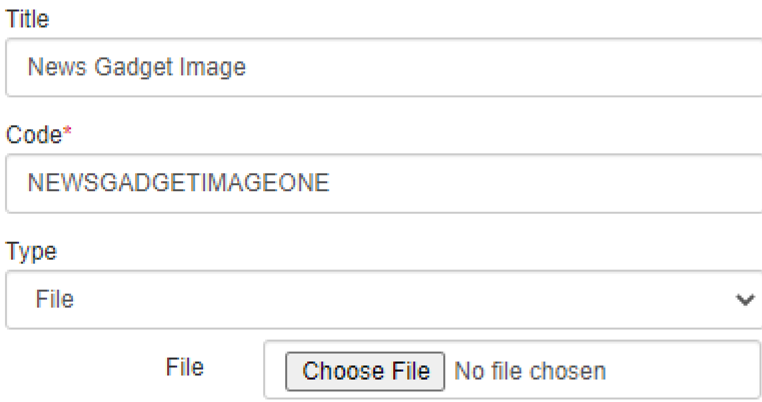
This opens the **Search Static Resources** form.

2. Click **[Add New Resource]**.



3. Fill in the upper part of the form:

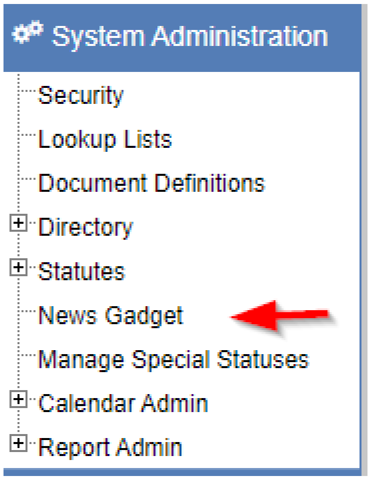
    - **Title**: Give your image a title.
    - **Code**: Type a unique code for your image in all caps and with no spaces.
    - **Type**: Change to be **File**.



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

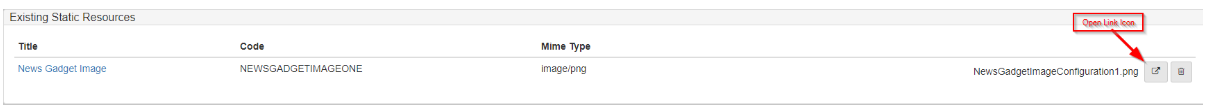
Add images to news gadget

1. Navigate to **Left navigation › 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:



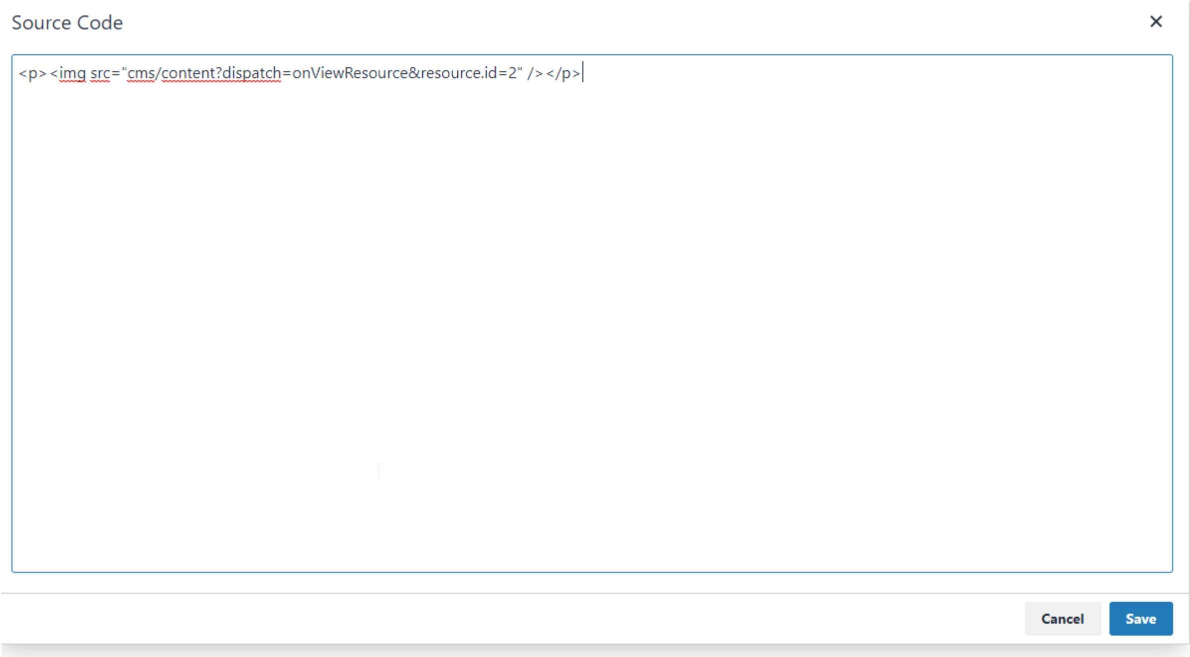
   Hovering over the button shows the URL at the bottom:

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 the source code button 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. Replace 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.



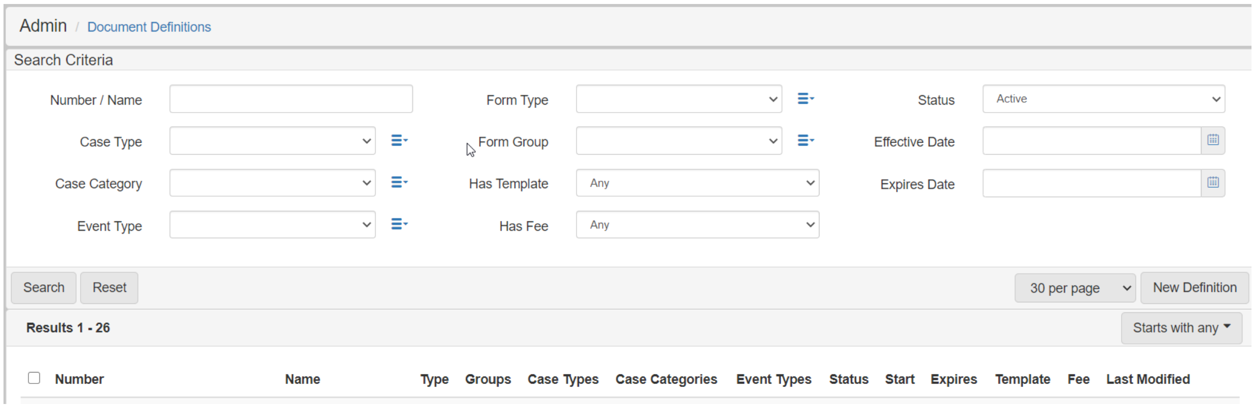
Document definitions

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**. Then you can search for or add a **Document Definition**.

Search document definitions

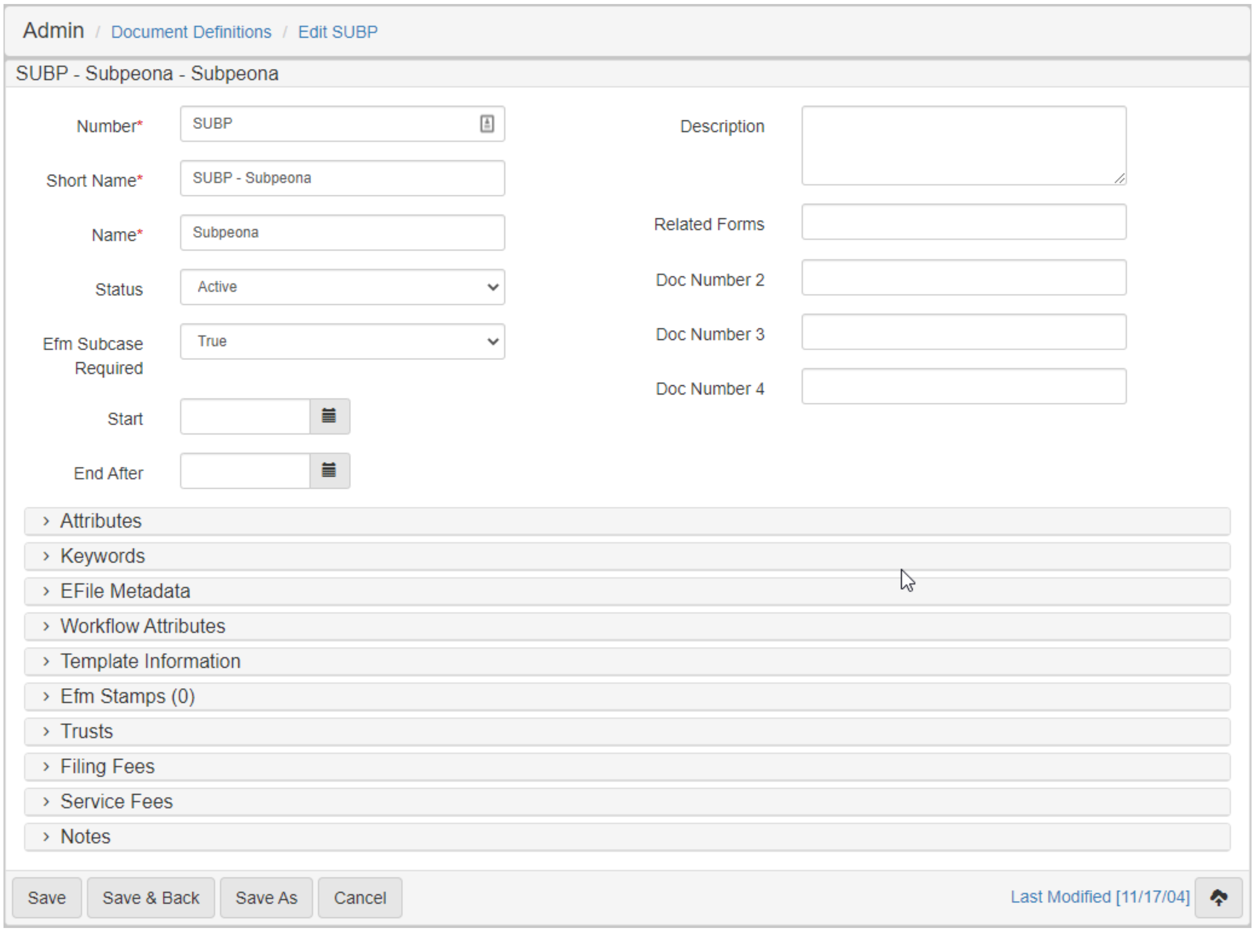
The **Document Definitions Search** screen:



In 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 **[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 in the **Document Definition** are metadata fields that can be referenced in searches, reports, or business rules.

Attributes

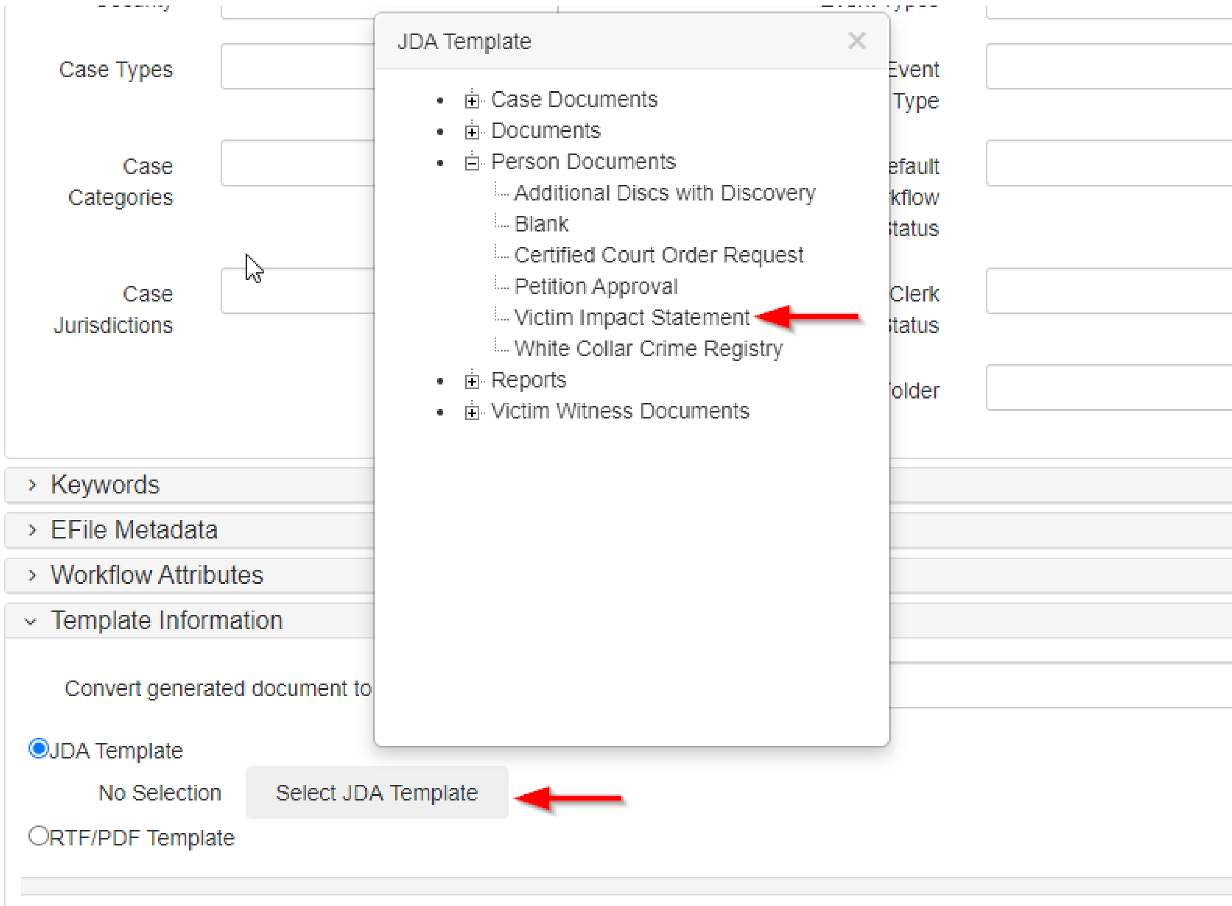
The only attribute you need to worry about setting is the **Form Type** attribute. Here are the **Form Types** you can choose from:

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

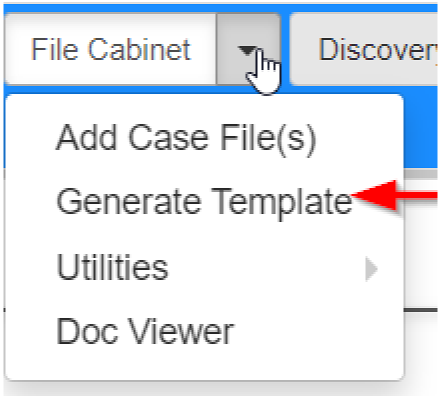
The **Template Information** section is used to set the JDA template for the **Document Definition**. This allows you generate documents from a case or person record.

To add a JDA template to a **Document Definition**, expand the **Template Information** section, then select **JDA Template**. Finally, click **[Select JDA Template]** and select your template.



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 going to a **Case** and selecting **Generate Template** from the **File Cabinet** menu.

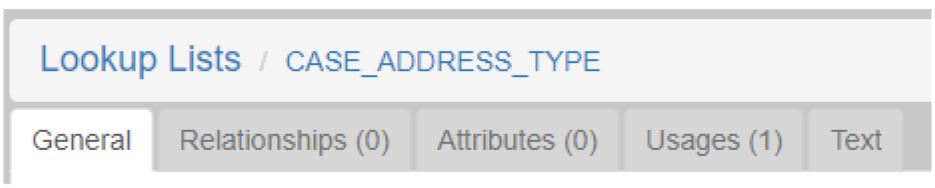


If you add a JDA template to a **Document Definition**, it is recommended that you change the **Form Type** to `JDA 4`.

Lookup lists

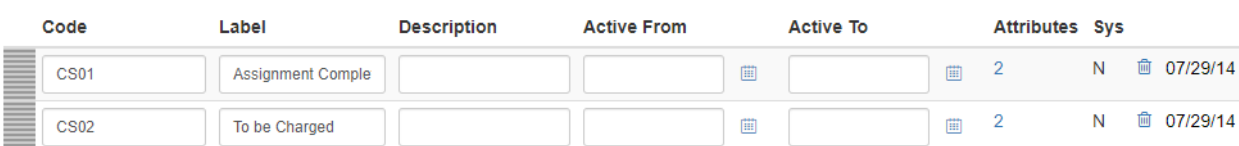
A **Lookup List** is a categorized list of values for a given thing. Examples of lookup lists are statuses, item types, or a group of values. They give a limited set of options to choose from in a dropdown, when configured.

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.

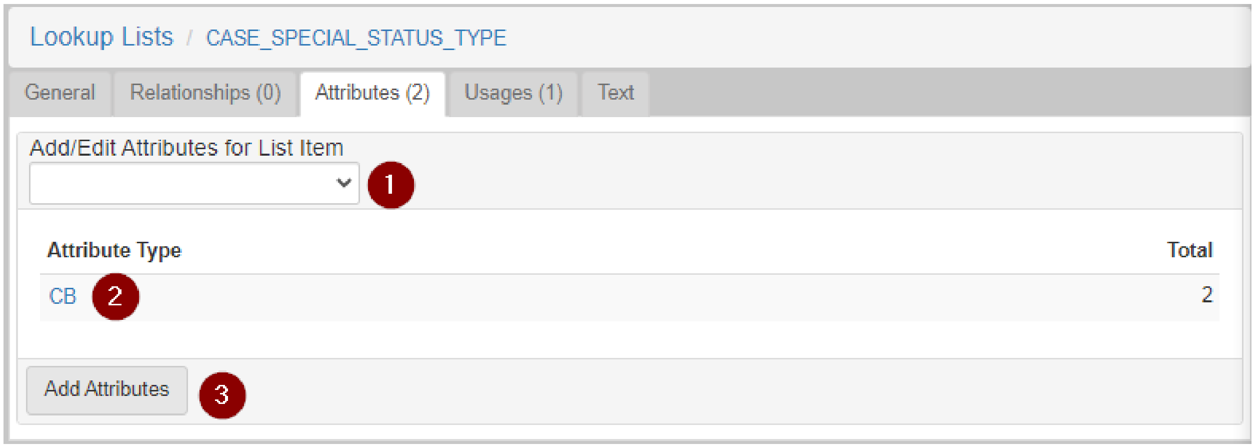
Text

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

Attributes

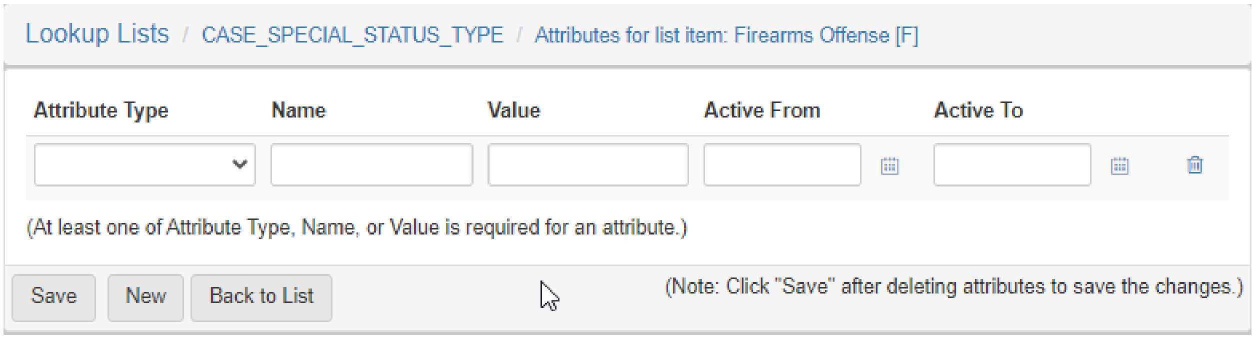
Lookup List attributes are a method for conveying extra information about a **Lookup List** item. Attributes are useful for defining special values, marking for use in a business rule, or otherwise declaring use in another system.

This is the **Attributes** tab on the **Lookup List** screen:



The **Add/Edit Attributes for List Item** dropdown allows you to change attribute definitions.

Attributes are flexible and can be used in many ways.



Categories

For **Reports**, **Business Rules**, and **Advanced Searches**, it is useful to categorize some **Lookup List** items into groups that can be treated similarly. This also allows for distinction in categories. For example, rather than marking a case status as `closed` or `open`, you could also have a `cancelled` status, giving more information to those who need it while still not appearing in searches for active cases.

Refer to the Case configuration documentation for more information.

Case type

The **Case Type Lookup List** (`CASE_TYPE`) has the following categories:

- **Other**
- **Prosecutor**
- **Court**
- **Law**

- **Defense**

Refer to the Case type configuration screen for more information.

Case status

The **Case Status Lookup List** (`CASE_STATUS`) has the following categories for its items:

- **Other**
- **Active**
- **Closed**

The **Active** and **Closed** categories are be used to filter out unneeded cases in advanced searches.

Refer to the Case status configuration screen for more information.

Case involvement type

The **Case Involvement Type Lookup List** (`PARTY_TYPE`) has the following categories:

- **Other**
- **Primary** (PIP)
- **Victim**
- **Witness**
- **Co-defendant**
- **Law Agency Officer**
- **Case Involvement**
- **Disqualified**
- **Attorney**
- **Lead**
- **Judge**

A **Primary Involved Person** (PIP) is required on every case, and is used to generate the case name. The PIP is typically the defendant.

Refer to the Case involvement type configuration screen for more information.

Case number type

The **Case Number Type Lookup List** (`OTHER_NUMBER_TYPE`) has the following categories:

- **Probation, Parole, Pretrial, Other**
- **Prosecution**
- **Court**
- **Law Enforcement**
- **Defense**
- **Non Agency Specific**

Refer to the Case number type category screen for more information.

Manage special statuses

Use the **Manage Special Statuses** screen to configure whether a **Case** Special Status, **Person** attribute, or **Directory Person** attribute is shown before the **Case Header**, **Person Header**, or **Directory Person Header**. You can also configure the background color for the **Case** special status, **Person** attribute, and **Directory Person** attribute. The screen shows links to the corresponding lookup lists at the top.

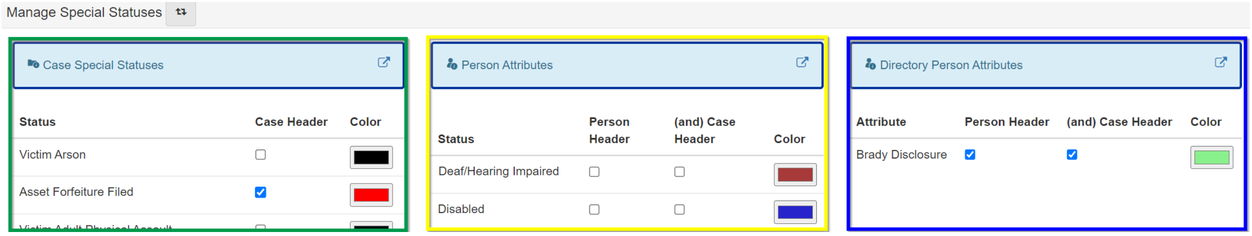


Figure 6. The **Managed Special Status** *screen.*

Manage case special statuses

Case Special Statuses show in the **Case Header** to call attention to important case information.

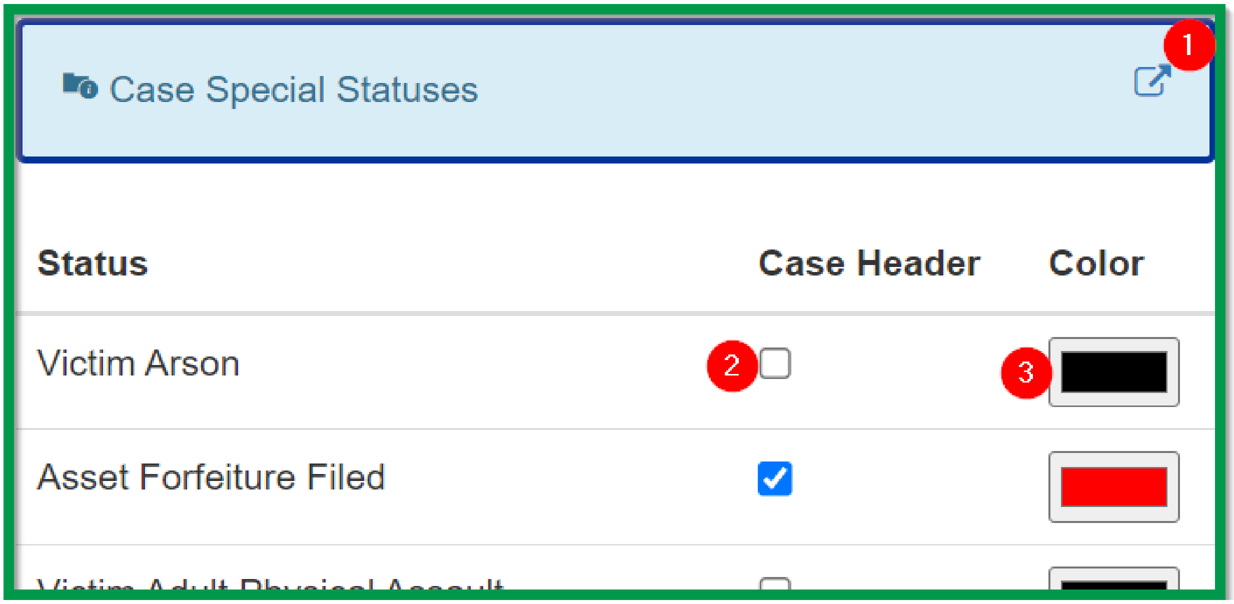


Figure 7. The **Case Special Statuses** *panel.*

1. Click to open the **CASE_SPECIAL_STATUS_TYPE** lookup list in a new browser tab.
2. Select to show the attribute before the **Case Header**:

Figure 8. A **Case** *Special Status showing before the* **Case Header**.

3. Click to set the status background color in the **Case Special Status** area.

Add a Case special status

1. Navigate to **Left navigation** › **System Administration** › **Manage Special Statuses.**
2. Click in the **Case Special Statuses** panel.
3. Open a **Case**.
4. Click the down arrow next to the **Summary** tab.
5. Click **Add Case Special Status**.
6. Set the special status by filling in the required fields.
7. Click **[Save]**.

Set a special status to show in the Case Header Form:

1. Navigate to **Left navigation › System Administration › Manage Special Statuses.**
2. In the **Case Special Statuses** section, find the **Case Special Status**.
3. Select **Case Header**.
4. Optional: click the **Color** box to select a custom color.
5. Click **[Save]**.

Manage person attributes

Person attributes highlight information about individuals. You can show **Person** attributes in the **Person Header** and the **Case Header**.

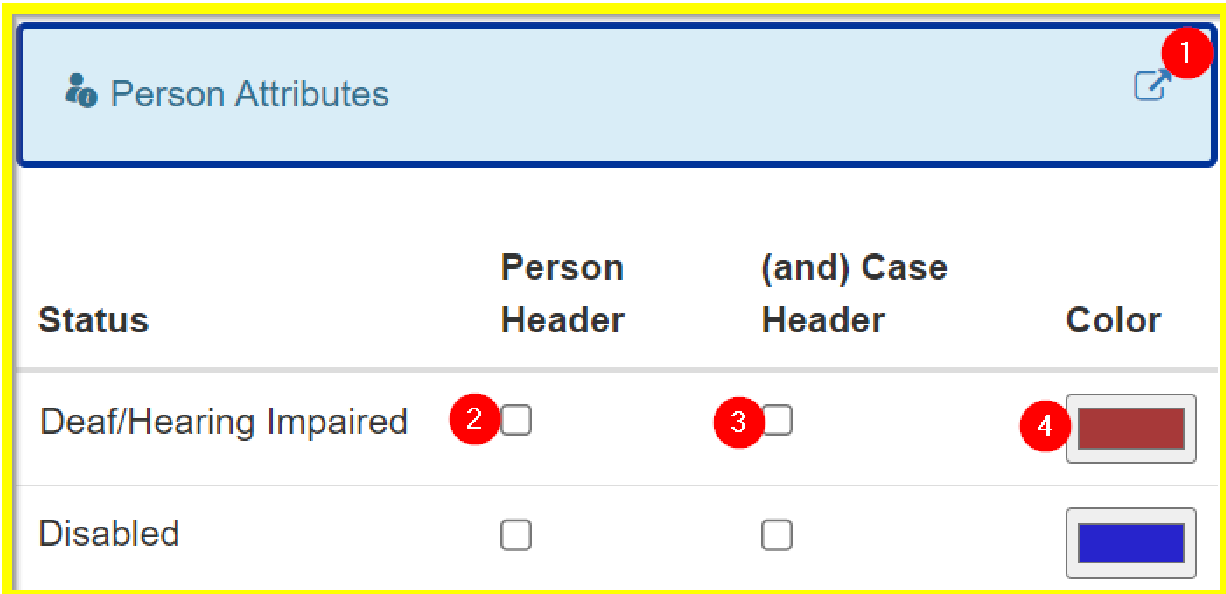


Figure 9. The **Person Attributes** *panel.*

1. Click to open the **PERSON_SPECIAL_STATUS** lookup list in a new browser tab.
2. Select **Person Header** to show the **Person** attribute before the **Person Header**:

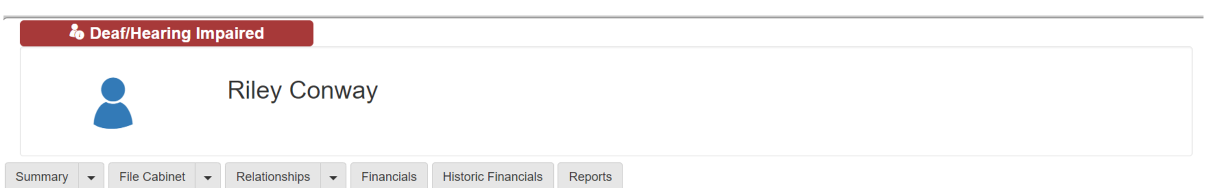


Figure 10. A **Person** *attribute before the* **Person Header***.*

3. Select **(and) Case Header** to show the **Person** attribute before the **Case Header**:

Figure 11. A **Person** *attribute before the* **Case Header***.*

4. Click to set the status background color in the **Case Special Status** area.

Add a Person attribute

1. Navigate to **Left navigation › System Administration › Manage Special Statuses**.
2. Click in the **Person Attributes** panel.
3. Open a **Person**.
4. Click the down arrow next to the **Summary** tab.
5. Click **Add Person Attribute**.
6. Set the attribute by filling in the required fields.
7. Click **[Save]**.

Set an attribute to show in the Person Header and Case Header

1. Navigate to **Left navigation › System Administration › Manage Special Statuses**.
2. In the **Person Attributes** panel, find the **Person** attribute.
3. Select **Person Header**.
4. Select **(and) Case Header**.

If you do not show an attribute in the **Person Header**, you cannot show the attribute in the **Case Header**.

5. Optional: click the **Color** box to select a custom color.
6. Click **[Save]**.

Manage directory person attributes

Directory Person attributes highlight information about Justice Personnel. You can show **Directory Person** attributes in the **Directory Person Header** and **Case Header**. **Directory Person** attributes are useful when an individual needs to be tracked for Brady/Giglio alerts.

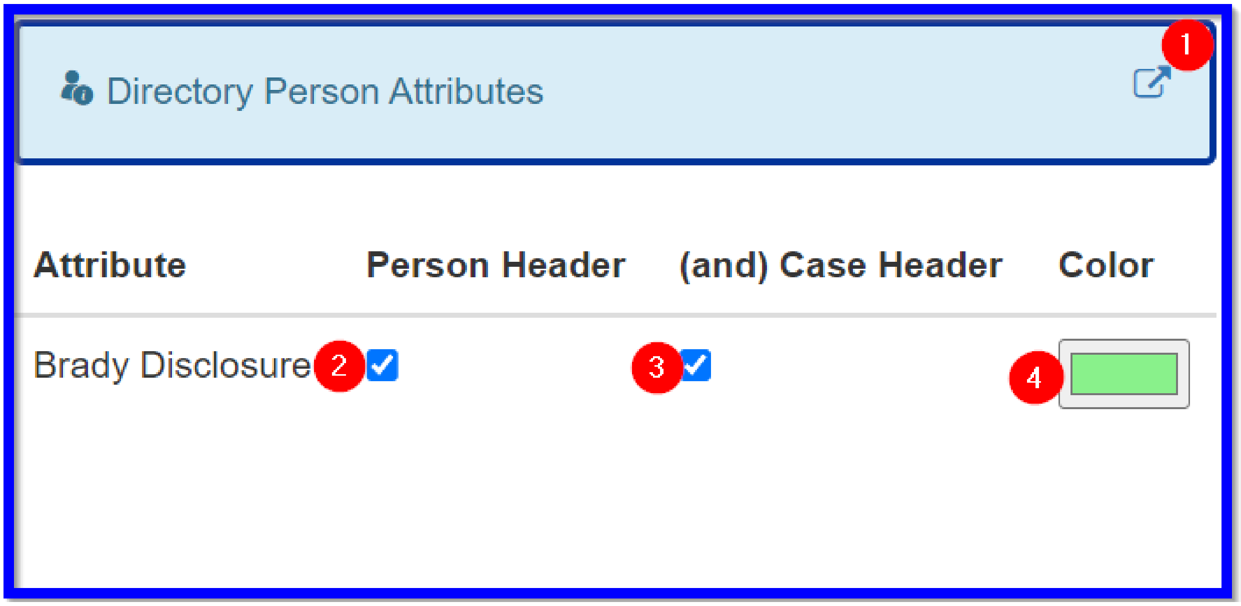


Figure 12. The **Directory Person Attributes** *panel.*

1. Click to open the **DIR_ATTRIBUTE_TYPE** lookup list in a new browser tab.
2. Select **Person Header** to show the **Directory Person** attribute before the **Directory Person Header**:

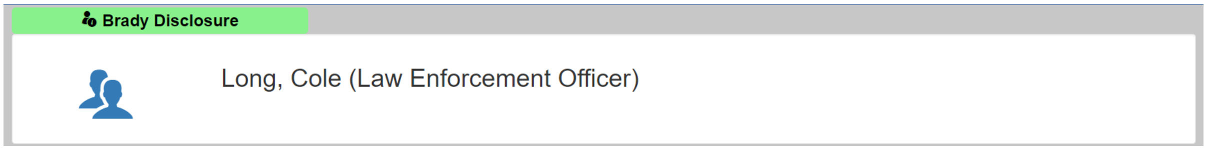


Figure 13. A **Directory Person** *attribute before the* **Person Header***.*

3. Select **(and) Case Header** to show the **Directory Person** attribute before the **Case Header**:

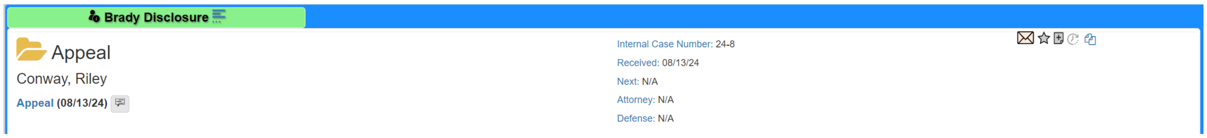


Figure 14. A **Directory Person** *attribute before the* **Case Header***.*

4. Click to set the attribute background color in the **Case Special Status** area.

Add, update, or delete directory person attributes

1. Navigate to **Left navigation › System Administration › Manage Special Statuses.**
2. Click in the **Directory Person Attributes** panel.
3. Add, update, and delete **Directory Person** attributes as needed.

4. Click **[Save]**.

Set an attribute on a Directory Person

1. Navigate to **Left navigation › Searches › Search Justice Personnel**.
2. Enter search criteria, then click **[Search]**.
3. Open a **Case**.
4. Click the **Case Involvement** navigation item.
5. Click next to the desired **Justice Personnel**.
6. Click the down arrow next to the **Summary** tab.
7. Select **Update Directory Person**.
8. Scroll down to the **Attribute** section.
9. In the **Attribute** field, enter the attribute name.
10. In the **Attribute Type** field, select an existing attribute.
11. In the **Value** field, enter a summary of important information related to the attribute.
12. Optional: set the **Start Date** and **End Date** fields.
13. Click **[Save]**.

Set an attribute to show in the Directory Person Header Form and Case Header Form

1. Navigate to **Left navigation › System Administration › Manage Special Statuses**.
2. In the **Directory Person Attributes** section, find the **Directory Person Attributes**.
3. Select **Person Header**.
4. Select **(and) Case Header**.

> If you do not show an attribute in the **Directory Person Header Form**, you cannot show the attribute in the **Case Header Form**.

5. Optional: click the **Color** box to select a custom color.
6. Click **[Save]**.

The attribute shows in the **Case Header Form** for every case the **Directory Person** is involved with. In the **Case Header Form**, the system shows the **Attribute Type** using the selected color. Click the paragraph icon for the notification to show a popup with the **Attribute Type**, **Justice Person** name, and the **Value** field.

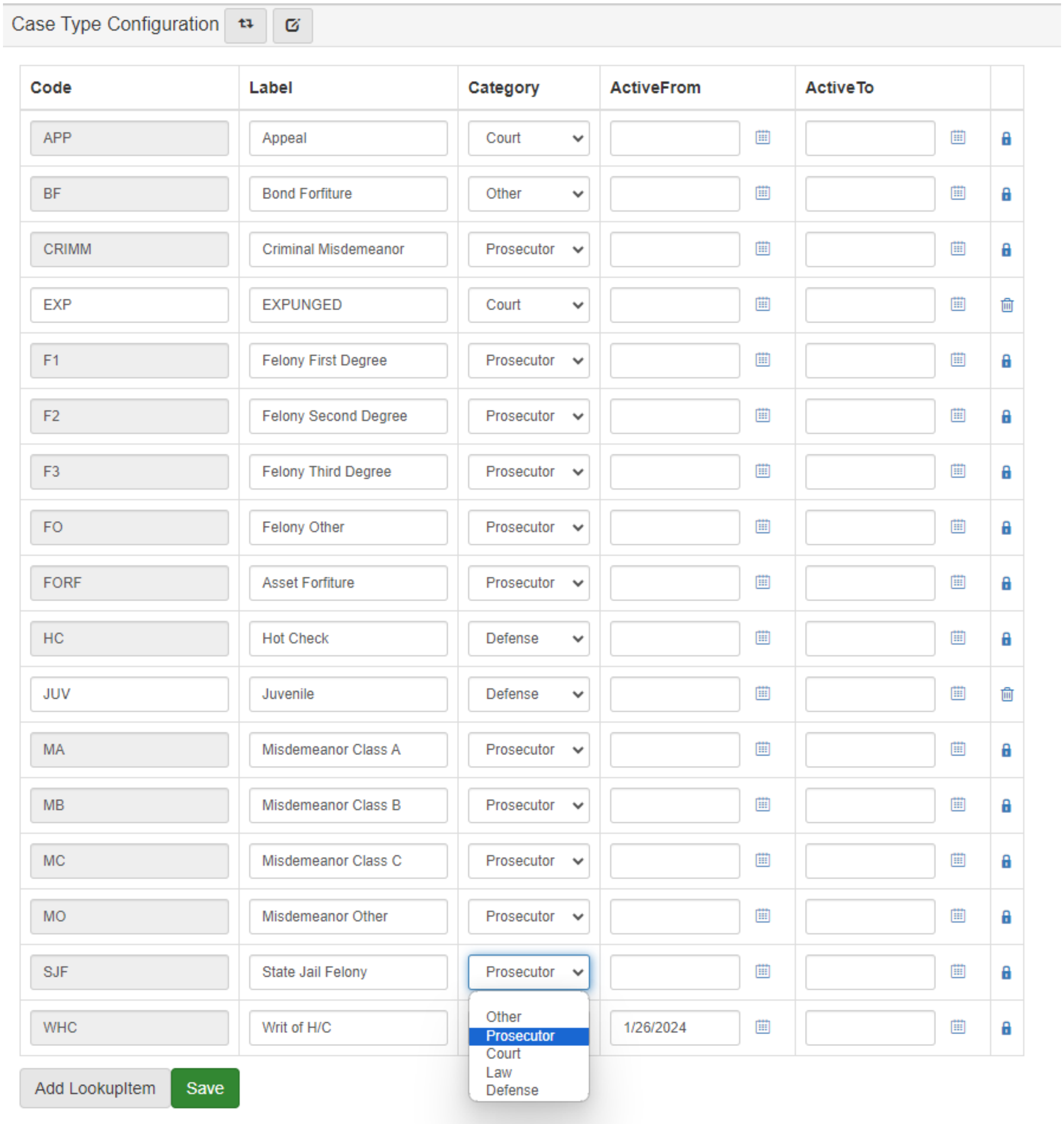
Case configuration

You can access the **Case** configuration screens by navigating to **Left navigation › System Administration › Case Configuration**. The screens include:

- https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/type.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/status.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/involvement_type.html
- https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/number_type.html

Case type configuration screen

All **Case Configuration** screens look similar to:



- **Code**: Behind-the-scenes value that represents the item. May be shown on some reports. Only accepts alphanumeric values (a-Z, 0-9). Special characters are not allowed, such as `!@#$%` and others.
- **Label**: The label shown in menus throughout eProsecutor Online. All characters, including special characters, are allowed.
- **Category**: Category type for the item. Searches, reports, and other screens filter available items based on this value.
- **ActiveFrom**: Start date for an active range.

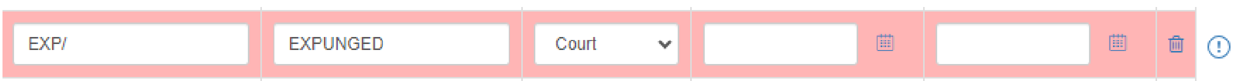
- **ActiveTo**: End date for an active range.

This screen allows you to change the **Code**, **Label**, **Category**, and **Active** date ranges for each item. You can add new items and delete existing items, as long as they are not currently in use. Items currently in use have the delete (trash can) icon replaced with a lock, which indicates the limitations for that item. The item code also cannot be modified while it is in use. You must save this screen to preserve your changes.

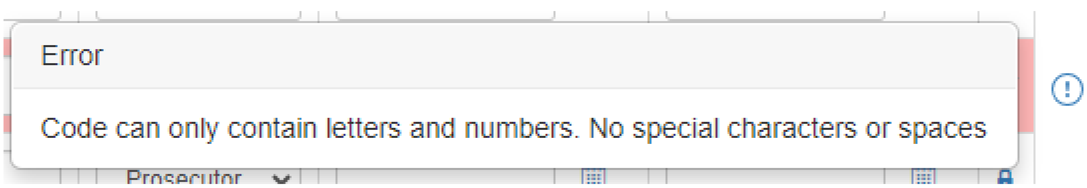
Active date ranges allow you to specify a time period for when an item should be shown. The date values do not need to be set. Setting only the **ActiveFrom** field means that a code is active after that date, while the **ActiveTo** field specifies an end date. Codes that are in use (and cannot be deleted) may be hidden by setting the **ActiveTo** date.

Errors

In case of invalid configuration, effected items are highlighted in red and an exclamation mark icon shows to the side.

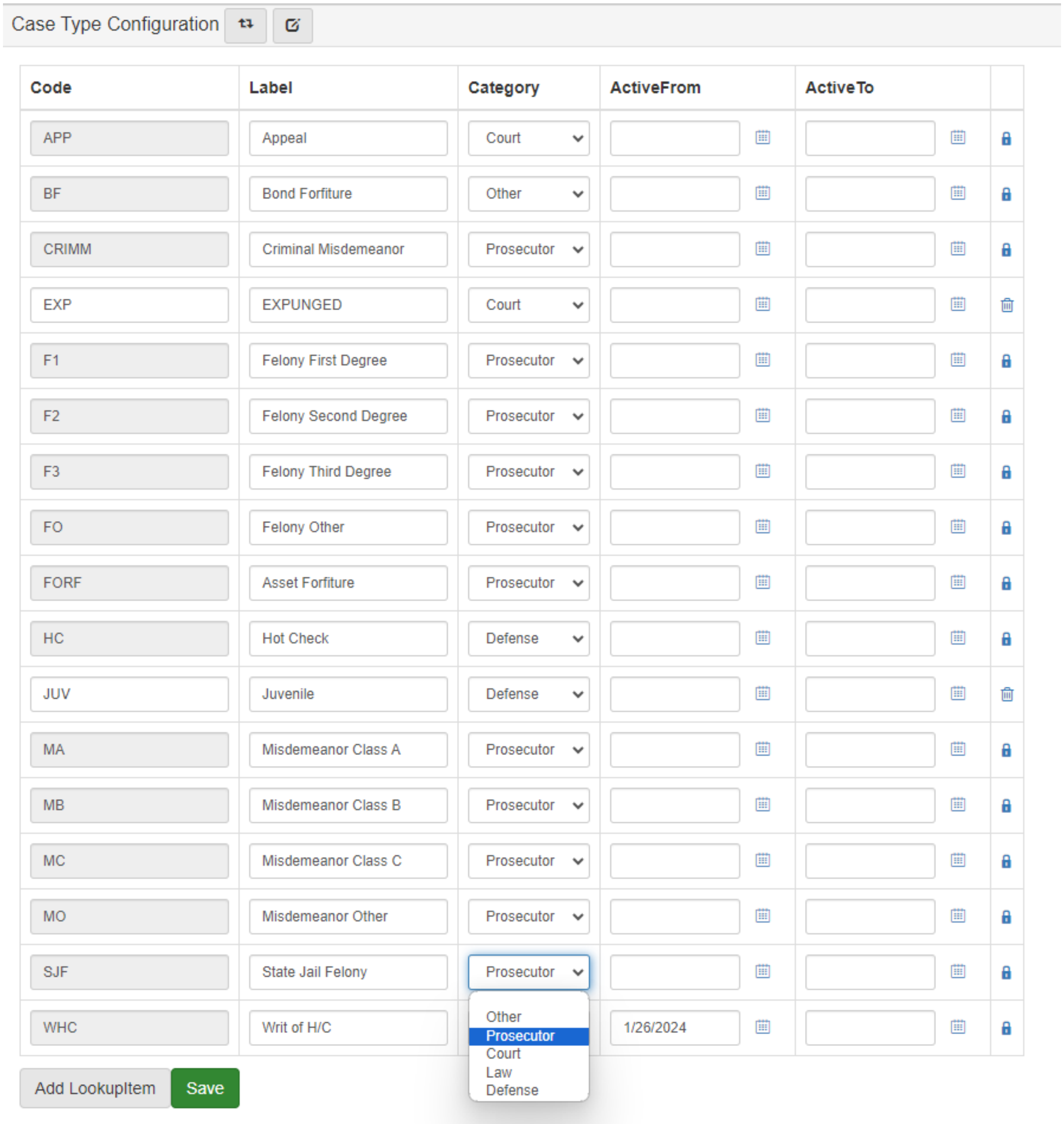


Clicking the exclamation mark shows an error message indicating why that item cannot be saved properly. The form can be saved again when the error is resolved.



Case type configuration screen

The **Case Type** categories affect which cases show in reports and advanced searches.



Refer to Case Configuration Screen [https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/index.html] for more information.

Category types

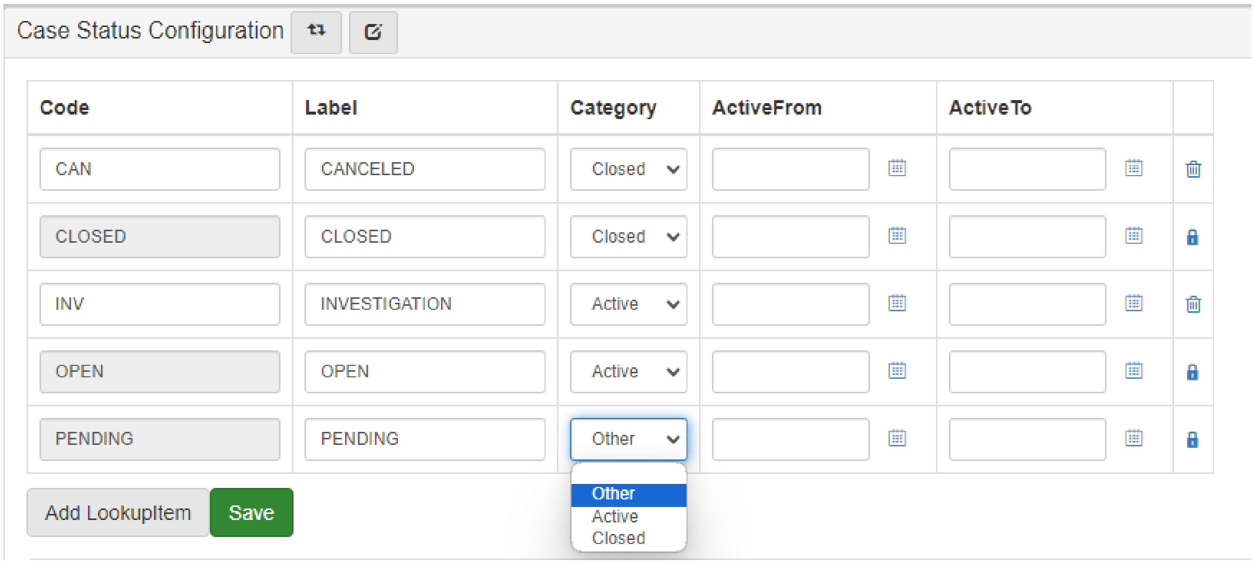
The case type lookup list has the following categories:

- **Other**
- **Prosecutor**

- **Court**
- **Law**
- **Defense**

Case status configuration screen

The **Case Status** categories affect which cases show in reports and advanced searches.



Refer to https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/index.html for more information.

Category types

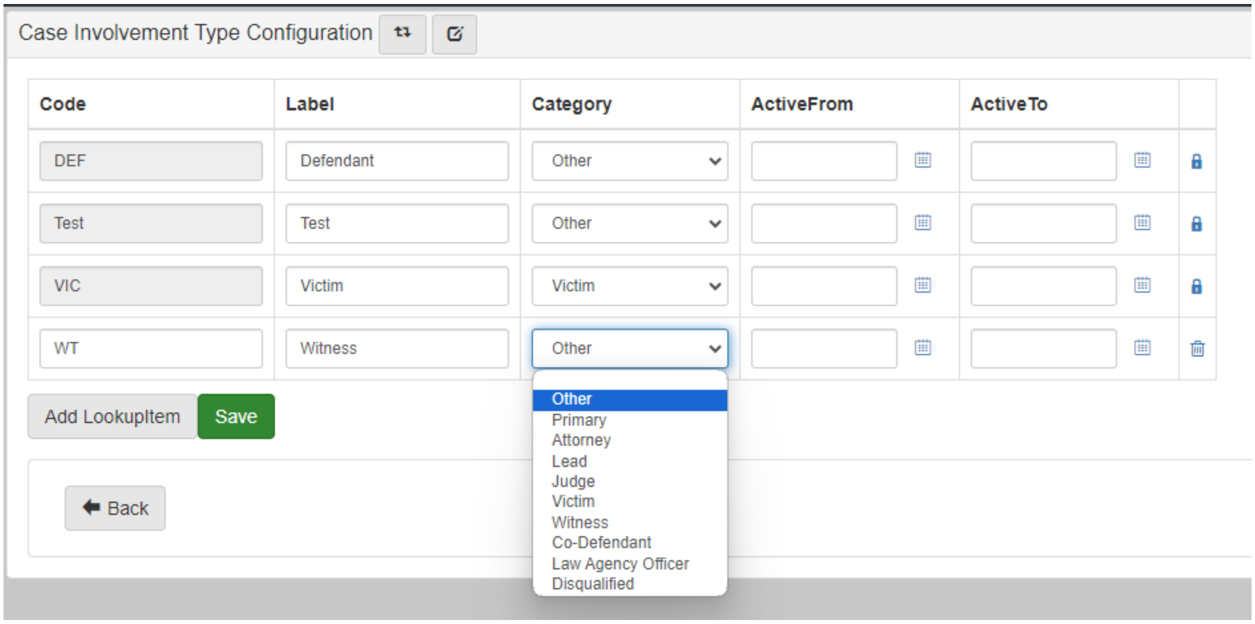
The case status lookup list has the following categories:

- **Other**
- **Active**
- **Closed**

The **Active** and **Closed** categories are used to filter out unneeded cases in searches.

Case involvement type configuration screen

The **Case Involvement Type** categories affect which parties show in reports and advanced searches.



Usage is detailed at the Case Configuration Screen [https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/index.html] page.

Category types

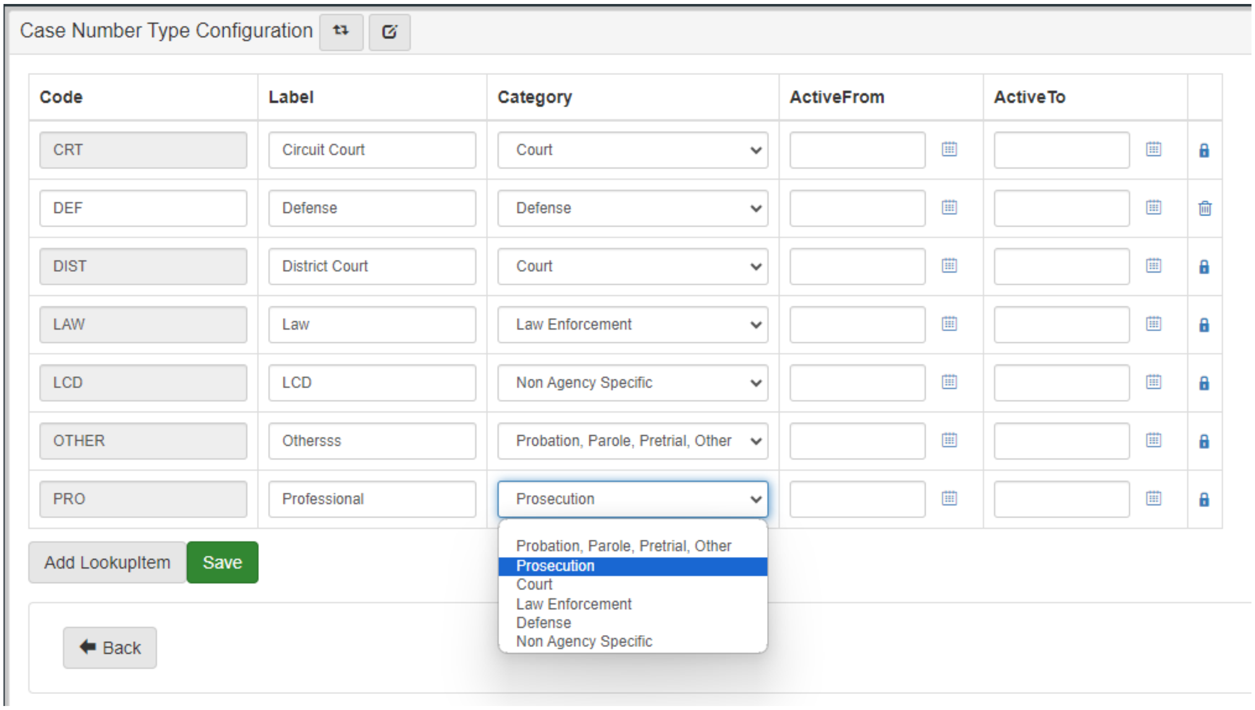
The case involvement types have the following categories:

- **Other**
- **Primary** (PIP)
- **Victim**
- **Witness**
- **Co-defendant**
- **Law Agency Officer**
- **Case Involvement**
- **Disqualified**
- **Attorney**
- **Lead**
- **Judge**

A **Primary Involved Person** (PIP) is required on every case, and is used to generate the case name. The PIP is typically the defendant.

Case number type category screen

The **Case Number Type** categories affect which case numbers show in reports and advanced searches.



Refer to https://documentation.journaltech.com/eProsecutorOnline/admin/case_configuration/index.html for more information.

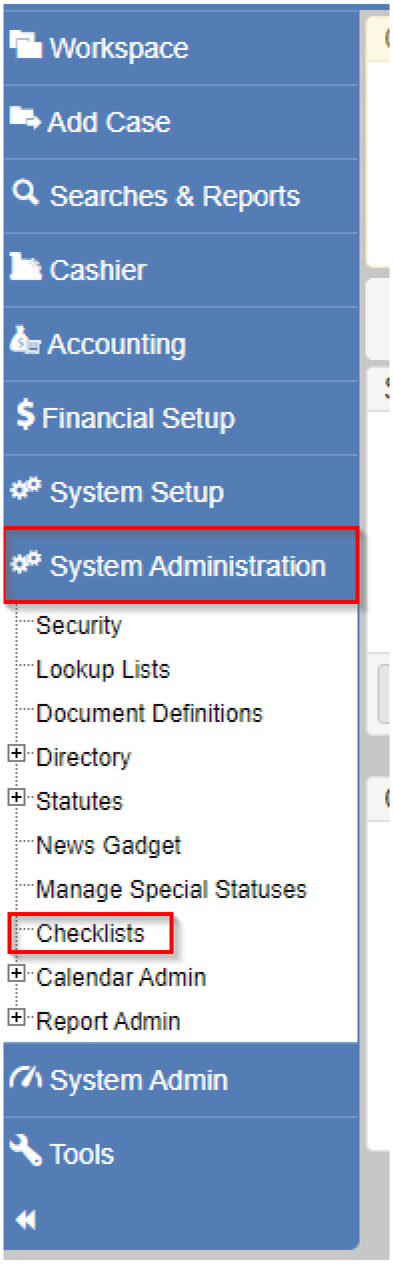
Category types

The case number type has the following categories:

- **Probation, Parole, Pretrial, Other**
- **Prosecution**
- **Court**
- **Law Enforcement**
- **Defense**
- **Non Agency Specific**

Checklists

Checklists are managed in **Left navigation › 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**

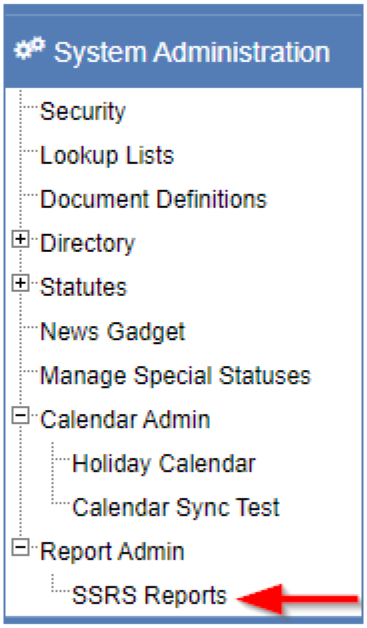
Date rules if desired. When you are finished, click **[Save]**.

Refer to https://documentation.journaltech.com/eProsecutorOnline/user/cases/tasks.html for information on adding checklists to cases.

Report administration

SSRS reports

The **SSRS Reports** screen shows all SQL Server Reporting Services (SSRS) Reports in the system. You can access it in the **Left navigation › System Administration › SSRS Reports**.



New Reports can be added by contacting Support and asking them to add the new/updated reports to the SSRS server.

There are several different types of reports that are used throughout eProsecutor Online, and all reports show up in their folders on the **SSRS Reports** screen.

Sections

1. **Case**: Reports in this folder show in the **Reports** tab on a **Case** record.
2. **Name/Person**: Reports in this folder show in the **Reports** tab on a **Person** record.
3. **Search**: These reports are available in **Left navigation › System Administration › SSRS Reports**.
4. **Financial**: Reports in this folder can be accessed in **Left navigation › Accounting ›**

Financial Reports.

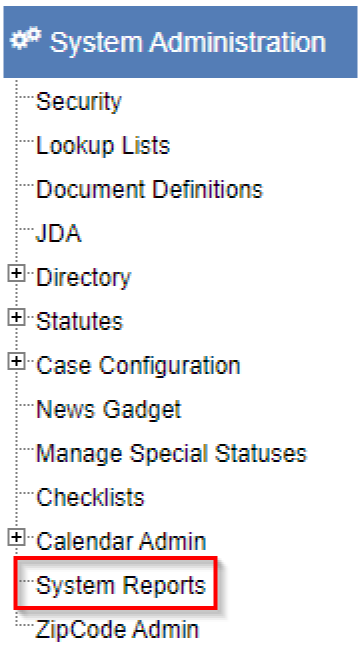
> You must be part of a **Security Group** that has access to financials.

5. **System**: These reports, along with all other reports, can be accessed in **Left navigation › System Administration › SSRS Reports**.

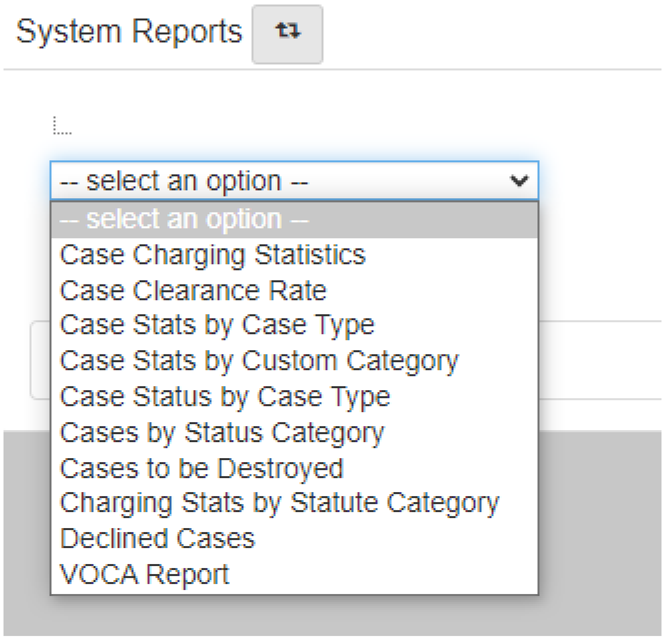
System reports

Reports which reference multiple **Cases** or **Persons** are considered system reports. To show system reports:

1. Navigate to **Left navigation › System Administration › System Reports**.



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



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

Default reports

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/case_charging_statistics.html

Shows the number of **Cases** received, filed, and declined during a selected time period.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/case_clearance_rate.html

Shows the clearance rate, broken down by **Case** type, for a selected time period.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/case_stats_by_case_type.html

Shows the number of **Cases** received, filed, and declined, broken down by **Case** type, during a selected time period.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/case_stats_by_custom_category.html

Shows the number of **Cases** matching selected **Case** statuses which were received in a selected time period. These numbers are aggregated by custom categories consisting of selected **Case** statuses.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/case_status_by_case_type.html

Shows the number of **Cases** received in a date range, filtered down by **Case** type and current **Case** status.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/cases_by_status_category.html

Shows **Cases** with a current status matching the selected list of statuses.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/cases_to_be_destroyed.html

Shows a list of closed **Cases** recommended for manual deletion based on the time frame selected.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/charging_stats_by_statute_category.html

Shows the number of **Counts** filed and declined on **Cases** received in a selected time period.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/declined_cases.html

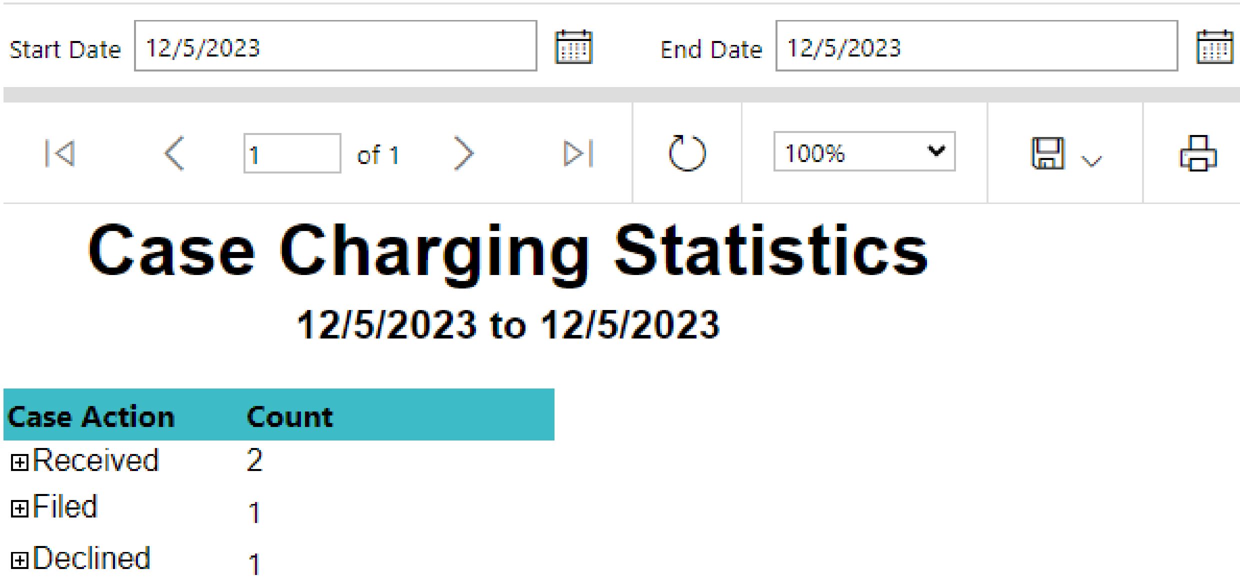
Shows the number of declined **Cases** received in a selected time period.

https://documentation.journaltech.com/eProsecutorOnline/admin/system_reports/voca.html

Shows victimizations, special classifications, and services reported in a selected time period.

Case charging statistics

This report provides the number of **Cases** received, filed, and declined during a selected time period.



Parameters

Use the **Start date** and **End date** parameters to filter the **Cases** included in the report.

Start Date

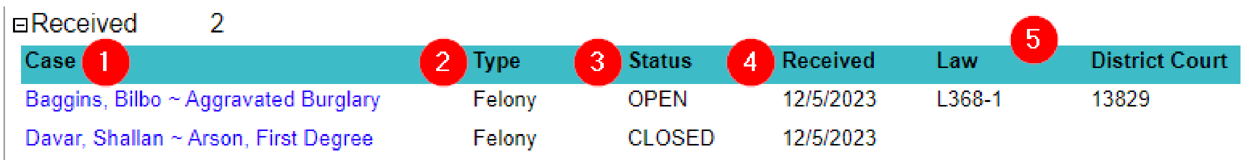
Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

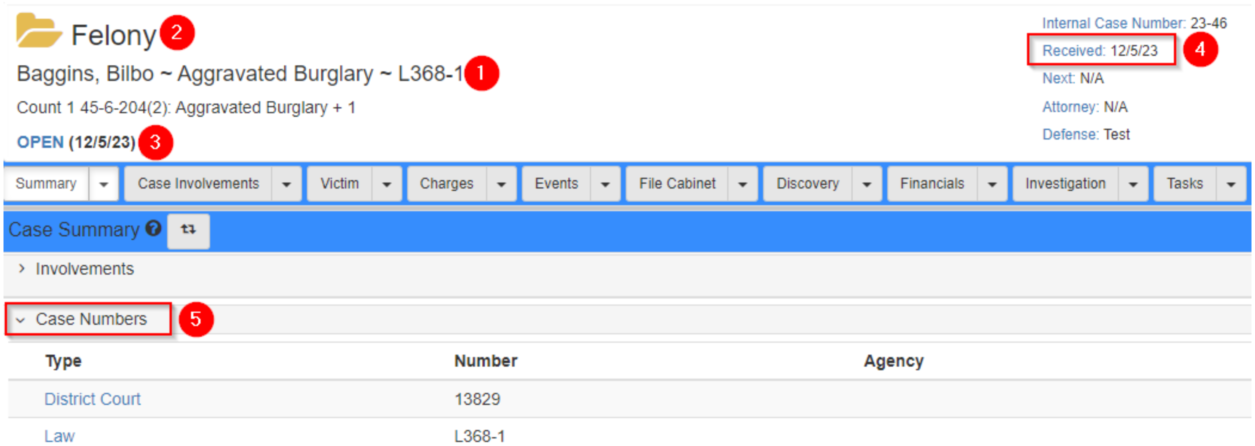
Received

The **Received** section includes all **Cases** with a received date between the **Start Date** and **End Date**. Expanding this section shows the following details:



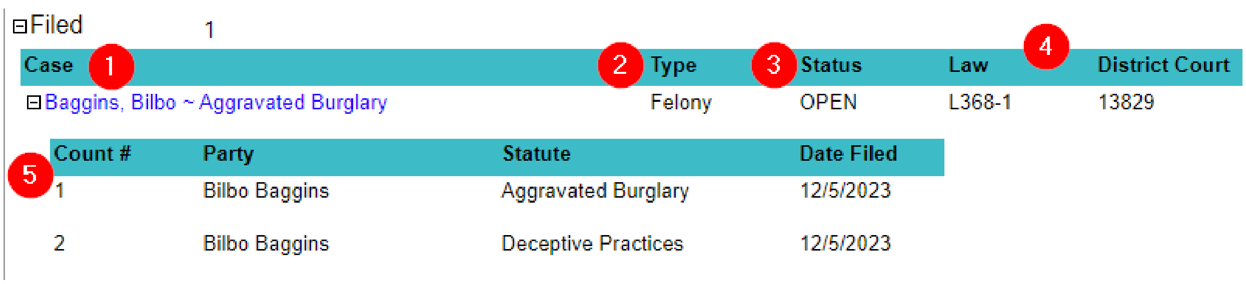
1. Name of the **Case**.
2. **Case** type.
3. **Case** status.
4. Received date.
5. Other numbers associated with the **Case**, if they exist. For example, a court docket number.

The **Case** name, type, status, and received date are shown in the header of the **Case Folder View**. The other case numbers are shown in the **Case Numbers** section of the **Summary** tab in the **Case Folder View**.



Filed

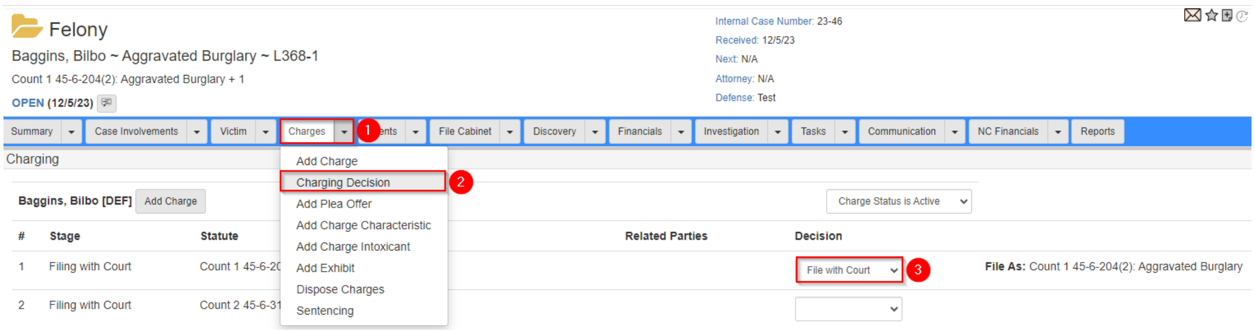
The **Filed** section includes all **Cases** with a **Count** filed between the **Start Date** and **End Date**. Expanding this section shows the following details:



1. Name of the **Case**.
2. **Case** type.
3. **Case** status.
4. Other numbers associated with the **Case**, if they exist.
5. Each filed **Count** and the date filed.

To set a **Count** as filed:

1. Click the dropdown next to the **Charges** tab in the **Case Folder View**.
2. Select **Charging Decision**.
3. Use the **Decision** dropdown to select **File with Court**.

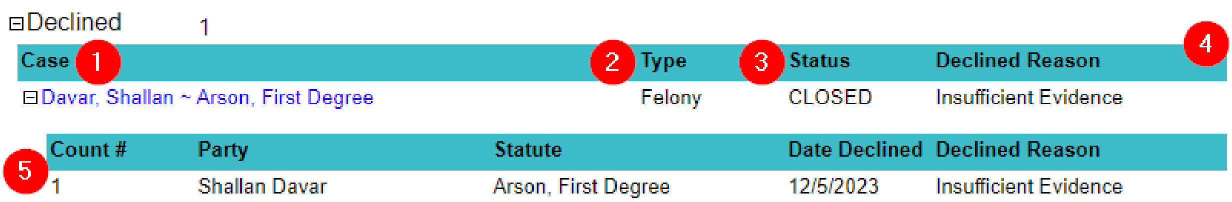


Declined

The **Declined** section includes all **Cases** with a **Count** declined between the **Start Date** and **End Date**.

A **Case** is not included in the declined section if it includes a filed **Count**.

Expanding this section shows the following details:

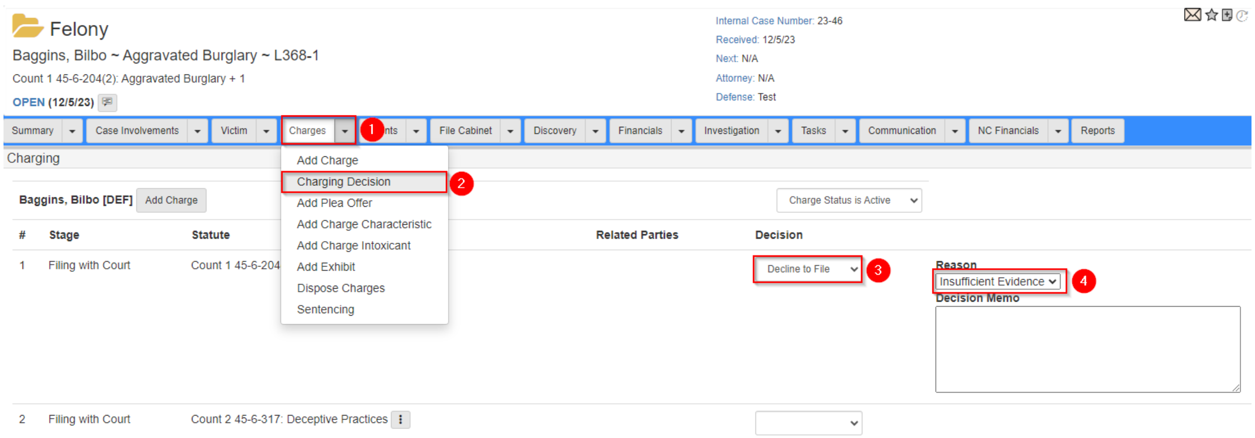


1. Name of the **Case**.
2. **Case** type.
3. **Case** status.
4. Other numbers associated with the **Case**, if exists.
5. Each declined **Count** and the declined reason.

To set a **Count** as declined:

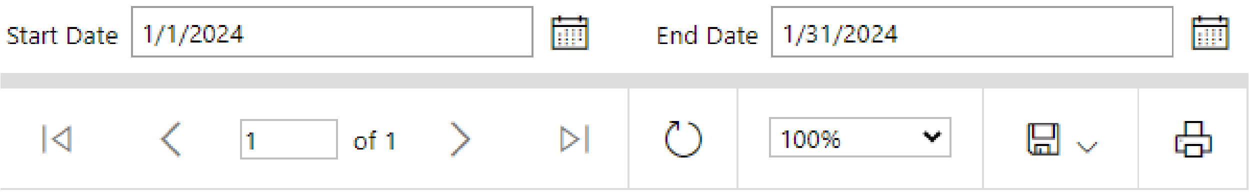
1. Click the dropdown next to the **Charges** tab in the **Case Folder View**.
2. Select **Charging Decision**.
3. Click the **Decision** dropdown, then select **Decline to File**.
4. Click the **Reason** dropdown, then select the decline reason.

   You may add more details in the **Decision Memo** field.



Case clearance rate

This report shows the clearance rate, broken down by **Case** type, for a selected date range:



Case Clearance Rate

1/1/2024 to 1/31/2024

Case Type (1)	Received (2)	Active (3)	Cleared (4)	Clearance Rate (5)
Civil	6	1	5	83.33%
Criminal	4	0	4	100.00%
Felony	3	1	2	66.67%
Open	3	0	3	100.00%
TOTAL	16	2	14	87.50%

⊞Active Case Total	2
⊞Cleared Case Total (6)	14

1. The **Case** type.
2. The count of **Cases** received in the date range.
3. The count of active **Cases** in the date range.
4. The count of cleared **Cases** in the date range.

5. The clearance rate, calculated as the number of cases cleared divided by the number of cases received.
6. Expandable detail sections for the active and cleared **Cases**.

Fields

Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates, inclusive.

Start Date
: Defaults to the first day of the previous month.

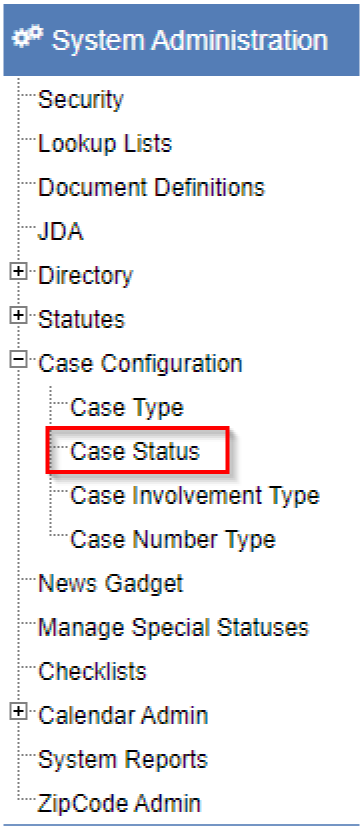
End Date
: Defaults to the last day of the previous month.

Active

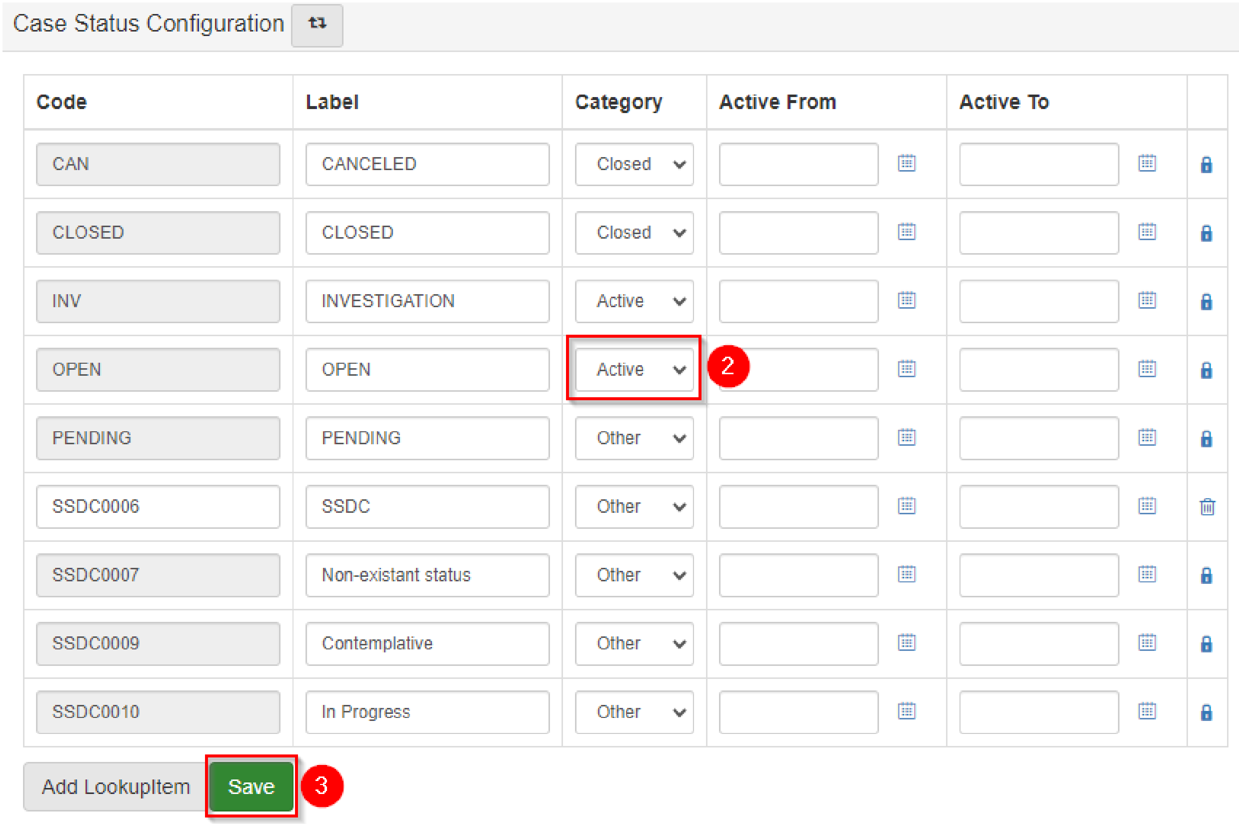
A **Case** is active if the current **Case** status has a **Category** of **Active**.

To set the **Category** of a **Case** status:

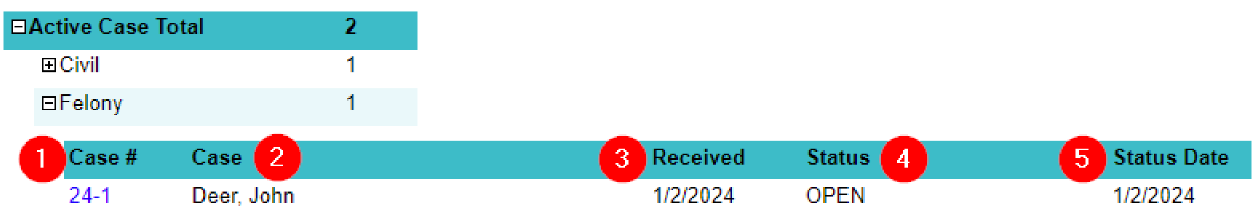
1. Navigate to **Left navigation › System Administration › Case Configuration › Case Status.**



2. In the **Category** dropdown, select a desired **Category**.
3. Click **[Save]**.

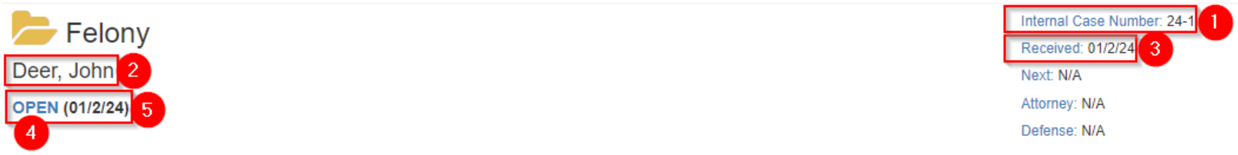


Click the ⊞ next to a **Case** type to show which **Cases** are included in the count. Expand this section to show the following details:



1. The **Case** number.
2. The **Case** name.
3. The **Case** received date.
4. The **Case** status.
5. The date of the current **Case** status.

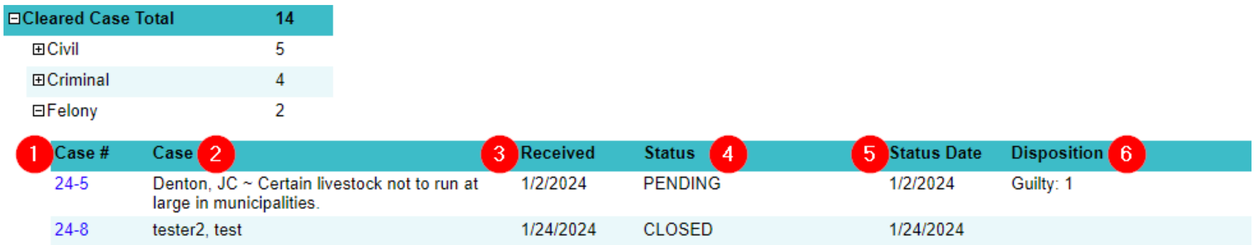
The **Case #**, **Case**, **Received**, **Status**, and **Status Date** values show in the header of the **Case Folder View**.



Cleared

A **Case** is cleared if the current **Case** status has a **Category** other than **Active**.

Click the ⊞ next to a **Case** type to show which **Cases** are included in the count. Expand this section to show the following details:



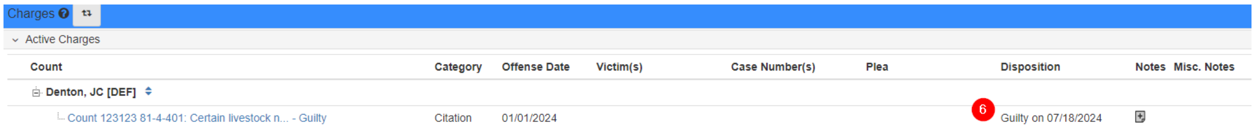
Cleared Case Total	14
Civil	5
Criminal	4
Felony	2

Case #	Case	Received	Status	Status Date	Disposition
24-5	Denton, JC ~ Certain livestock not to run at large in municipalities.	1/2/2024	PENDING	1/2/2024	Guilty: 1
24-8	tester2, test	1/24/2024	CLOSED	1/24/2024	

1. The **Case** number.
2. The **Case** name.
3. The **Case** received date.
4. The **Case** status.
5. The date of the current **Case** status.
6. A list of **Charge** dispositions for the **Case**.

The **Case #**, **Case**, **Received**, **Status**, and **Status Date** values show in the header of the **Case Folder View**.

The **Disposition** column shows a list of **Charge** dispositions followed by the count of **Charges** for each disposition. **Charge** dispositions are show in the **Charges** tab of the **Case Folder View**.



Case stats by case type

This report shows the number of **Cases** filed, declined, and received in a date range. These numbers are counted by **Case** type. Click a number in the summary section to show a sub report listing the associated **Cases**.

Case Stats by Case Type

12/1/2023 to 12/31/2023

Case Type	Received	Filed	Declined
Civil	3	1	0
Felony	2	1	1

Fields

Start Date 12/1/2023 End Date 12/31/2023 Case Type Civil,Criminal,Felony,Open,SSDC

Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates. Use the **Case Type** field to show **Cases** with that type.

Start Date

Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

Case Type

Defaults to empty, which includes all **Case** types.

Received

Click a number in the **Received** column to show the associated **Cases**. Each included **Case** shows the following details:

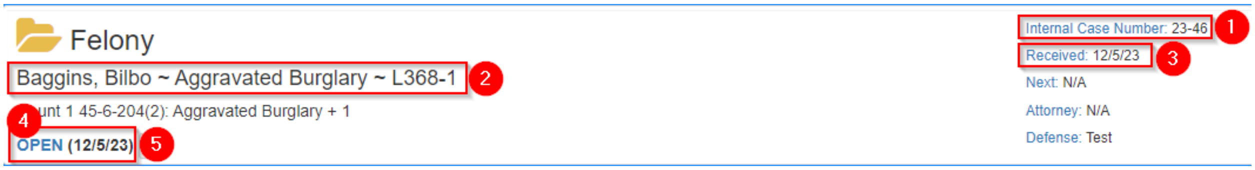
Felony Cases Received

12/1/2023 to 12/31/2023

Case # 1	Case 2	3 Received	Status 4	5 Status Date
23-46	Baggins, Bilbo ~ Aggravated Burglary	12/5/2023	OPEN	12/5/2023
23-47	Davar, Shallan ~ Arson, First Degree	12/5/2023	OPEN	12/5/2023

1. **Case** number.
2. Name of the **Case**.
3. Received date.
4. **Case** status.
5. Date of the current **Case** status.

The **Case #**, **Case**, **Received**, **Status**, and **Status Date** values show in the header of the **Case Folder View**.



Filed

Click a number in the **Filed** column to show the associated **Cases**. Each included **Case** shows the following details:

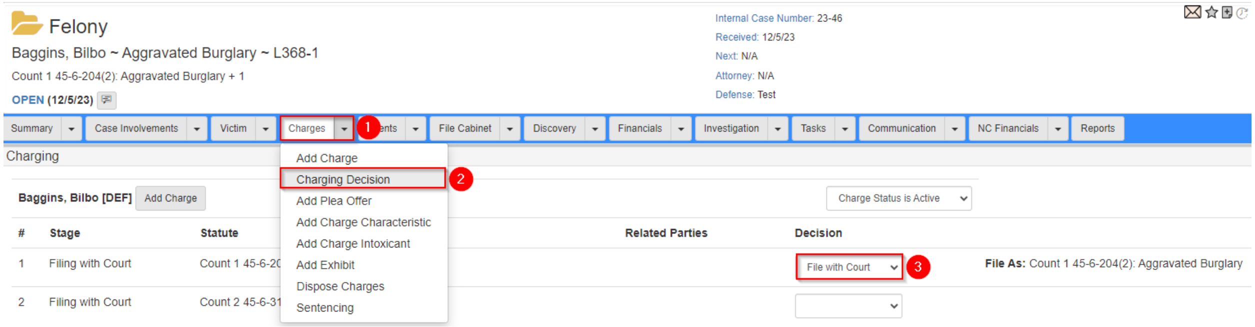
Civil Cases Filed

12/1/2023 to 12/31/2023

Case #	Case	Received	Status	Status Date	Date Filed
23-48	Deer, John ~ abc123	12/14/2023	OPEN	12/14/2023	12/14/2023

1. **Case** number.
2. Name of the **Case**.
3. Received date.
4. **Case** status.
5. Date of the current **Case** status.
6. The earliest filed date for a **Count**.

To set a **Count** as filed:



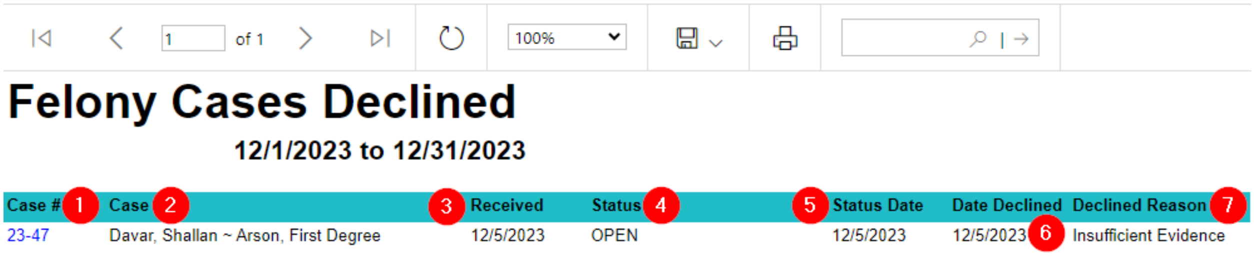
1. Navigate to a **Case**.
2. In the **Charges** dropdown, select **Charging Decision**.
3. In the **Decision** dropdown, select **File with Court**.

Declined

Click a number in the **Declined** column to show the associated **Cases**.

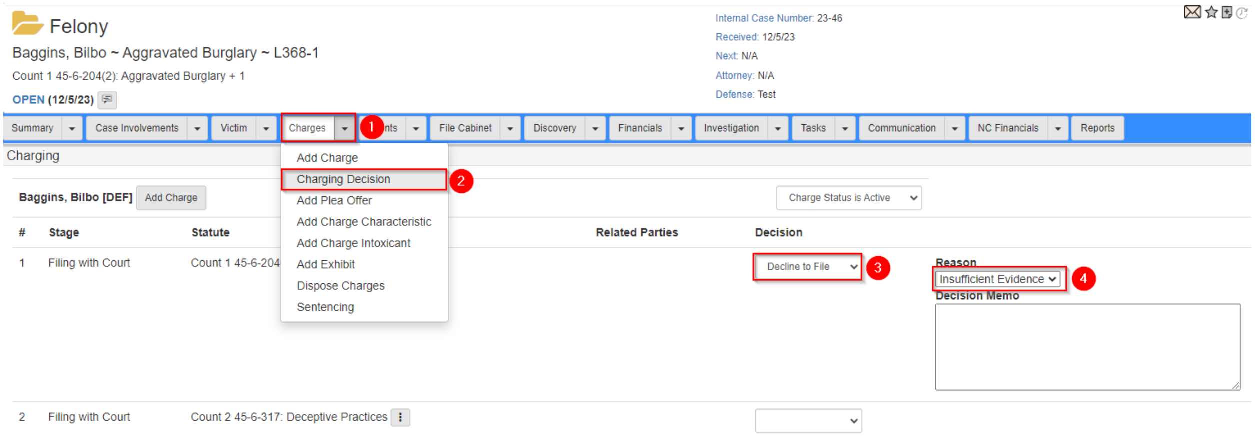
The list of declined **Cases** excludes those with a filed **Count**.

Each declined **Case** shows the following details:



1. **Case** number.
2. Name of the **Case**.
3. Received date.
4. **Case** status.
5. Date of the current **Case** status.
6. The earliest declined date for a **Count**.
7. The declined reason for the **Count**.

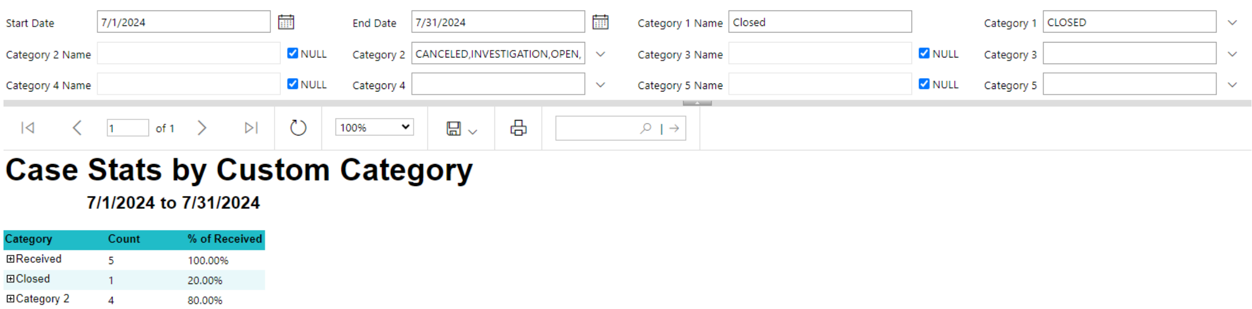
To set a **Count** as declined:



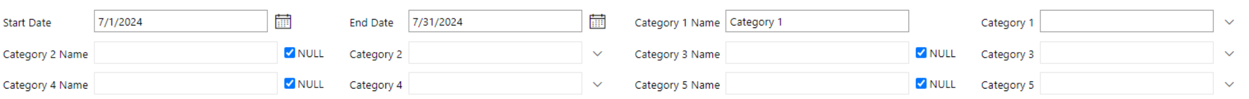
1. Navigate to a **Case**.
2. In the **Charges** dropdown, select **Charging Decision**.
3. In the **Decision** dropdown, select **Decline to File**.
4. In the **Reason** dropdown, select the reason for declining.
5. Optional: in the **Decision Memo** field, add more details.

Case stats by custom category

This report shows the number of **Cases** matching selected **Case** statuses which were received in a date range. These numbers are aggregated by custom categories consisting of selected **Case** statuses.



Fields



Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates.

There are five custom categories, each with two fields.

Only **Category 1** is required to generate the report. The other category fields are optional.

Use the **Category Name** field to specify a name for the category. To set a category name:

1. Deselect **NULL** for the category.
2. Type a value into the **Category Name** field.

For each custom category, use the **Category_n_** dropdown to select the **Case** statuses to include in the category.

Start Date

Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

Category Name

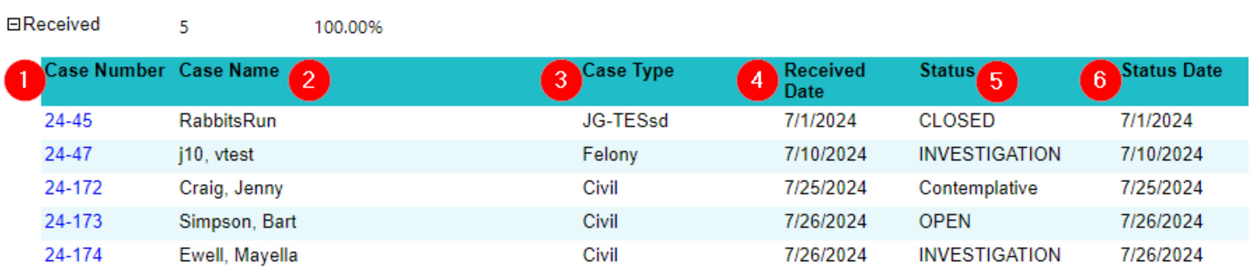
Defaults to empty and returns the category number if a value is not provided.

Category

Defaults to empty.

Received

The **Received** section includes **Cases** with a received date between the **Start Date** and **End Date**. Expand this section to show the following details:



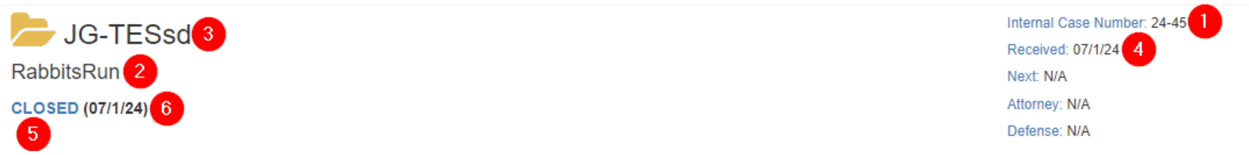
⊟Received 5 100.00%

Case Number	Case Name	Case Type	Received Date	Status	Status Date
24-45	RabbitsRun	JG-TESsd	7/1/2024	CLOSED	7/1/2024
24-47	j10, vtest	Felony	7/10/2024	INVESTIGATION	7/10/2024
24-172	Craig, Jenny	Civil	7/25/2024	Contemplative	7/25/2024
24-173	Simpson, Bart	Civil	7/26/2024	OPEN	7/26/2024
24-174	Ewell, Mayella	Civil	7/26/2024	INVESTIGATION	7/26/2024

1. **Case** number.
2. Name of the **Case**.
3. **Case** type.
4. Received date.
5. **Case** status.

6. Date of the current **Case** status.

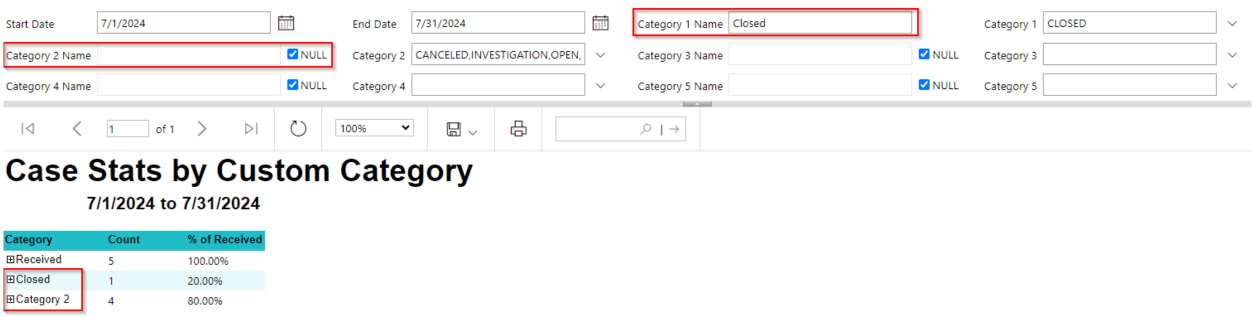
The **Case Number**, **Case Name**, **Case Type Received Date**, **Status**, and **Status Date** values show in the header of the **Case Folder View**.



Custom categories

Each **Category** section includes **Cases** with a current or previous **Case** status matching the **Category** field.

The label in the **Category** column matches the **Category Name** field. If no value is provided in the **Category Name** field, it shows the category number.



Each category row shows the number of **Cases** included as a percent of **Cases** received. This is calculated as the number of cases in the custom category divided by the number of received cases.

Category	Count	% of Received
⊞Received	5	100.00%
⊞Closed	1	20.00%
⊞Category 2	4	80.00%

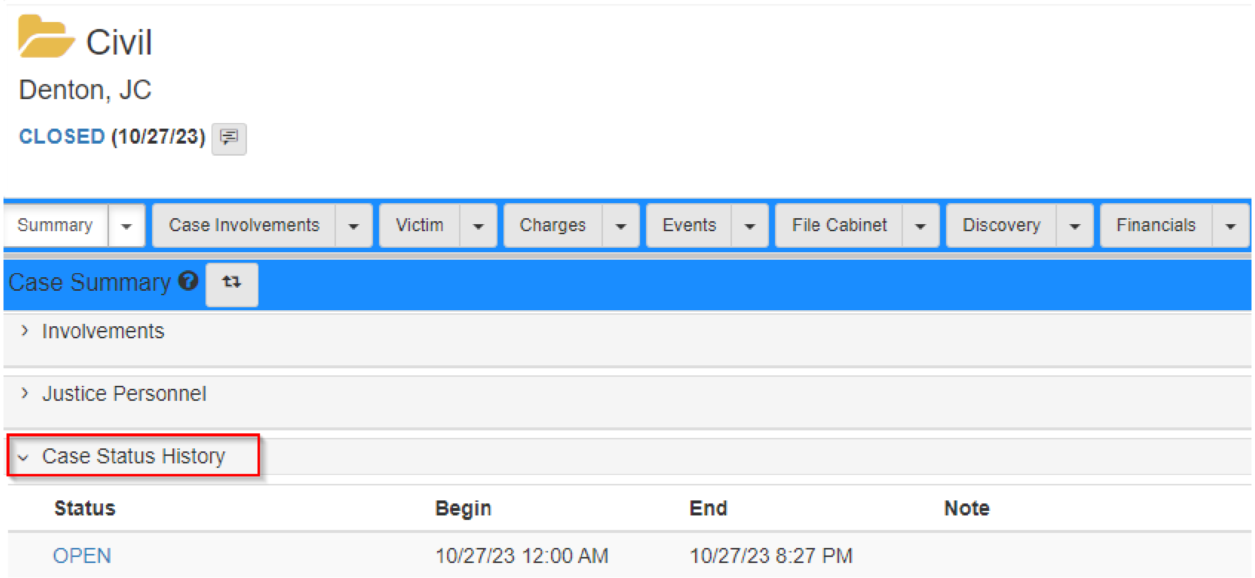
Expand this section to show the following details:

⊟Category 2 4 80.00%

1 Case Number	Case Name 2	3 Case Type	4 Received Date	Status 5	6 Status Date
24-47	j10, vtest	Felony	7/10/2024	INVESTIGATION	7/10/2024
24-172	Craig, Jenny	Civil	7/25/2024	Contemplative	7/25/2024
24-173	Simpson, Bart	Civil	7/26/2024	OPEN	7/26/2024
24-174	Ewell, Mayella	Civil	7/26/2024	INVESTIGATION	7/26/2024

1. **Case** number.
2. Name of the **Case**.
3. **Case** type.
4. Received date.
5. **Case** status.
6. Date of the current **Case** status.

The history of **Case** statuses is shown in the **Case Status History** section of the **Summary** tab in the **Case Folder View**.



Case status by case type

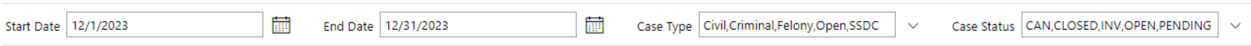
This report shows the number of **Cases** received in a date range, filtered down by **Case** type and current **Case** status.

Case Status by Case Type

12/1/2023 to 12/31/2023

Case Type	Count
⊞Civil	3
⊞Felony	2

Fields



Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates. Use the **Case Type** field to show **Cases** with the selected **Case** type. Use the **Case Status** field to show **Cases** with the selected **Case** status.

Start Date

Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

Case Type

Defaults to **Case** types of **Cases** received between the **Start Date** and **End Date**.

Case Status

Defaults to **Case** statuses of **Cases** received between the **Start Date** and **End Date**.

A **Case** shows in this report only when it meets three conditions:

1. The received date is between the **Start Date** and **End Date**.
2. The **Case** type matches a value selected in the **Case Type** dropdown.
3. The current **Case** status matches a value selected in the **Case Status** dropdown.

Case type

The **Case Type** section shows a count of **Cases** with a type selected in the **Case Type** dropdown. Expand this section to show the count by **Case** status.

Case Type	Count
⊟Civil	3

Case Status	Count
⊞Contemplative	1
⊞INVESTIGATION	1
⊞OPEN	1

Case status

The **Case Status** section shows a count of **Cases** with a current **Case** status selected in the **Case Status** dropdown. Expand this section to show the following details:

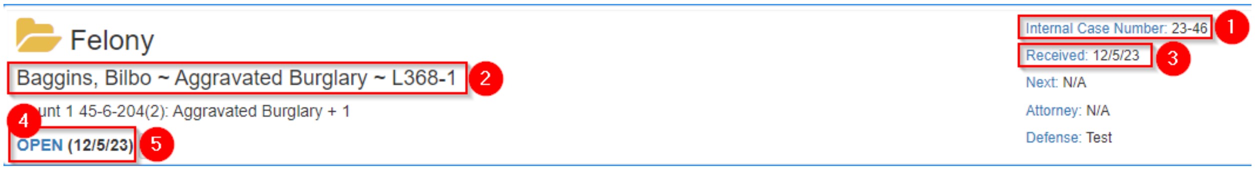
⊟Felony	2

Case Status	Count
⊟OPEN	2

1 Case #	Case 2	3 Received	4 Status Date
23-46	Baggins, Bilbo ~ Aggravated Burglary	12/5/2023	12/5/2023
23-47	Davar, Shallan ~ Arson, First Degree	12/5/2023	12/5/2023

1. **Case** number.
2. Name of the **Case**.
3. Received date.
4. Date of the current **Case** status.

The **Case #**, **Case**, **Received**, and **Status Date** values show in the header of the **Case Folder View**.



Cases by status category

This report shows **Cases** with a current status matching the selected list of statuses.

Cases by Status Category

Case #	Case	Case Type	Received	Status
23-46	Baggins, Bilbo ~ Aggravated Burglary **Other Numbers:** Law: L368-1, District Court: 13829 **Next Event:** Preliminary Hearing on Sep 25 2024 9:30AM **Primary Involvements** Baggins, Bilbo Defendant	Felony	12/5/2023	SSDC
24-165	Craig, Jenny **Primary Involvements** Craig, Jenny Defendant	Criminal	4/18/2024	Contemplative

Fields

Case Type	Status Category	Case Status
Civil,Criminal,Felony,Open,SSDC	Active	INVESTIGATION,OPEN

Use the **Case Type** field to show **Cases** with that type. Use the **Status category** field to show **Case Status** options with that category. Use the **Case status** field to show **Cases** with that status.

Case Type

Defaults to all **Case** types.

Status Category

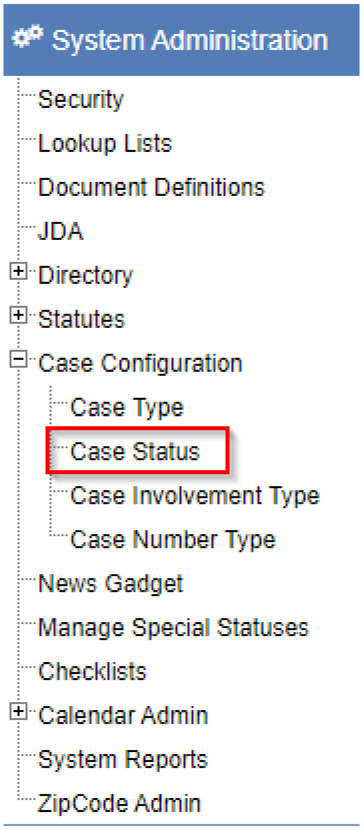
Defaults to **Active**.

Case Status

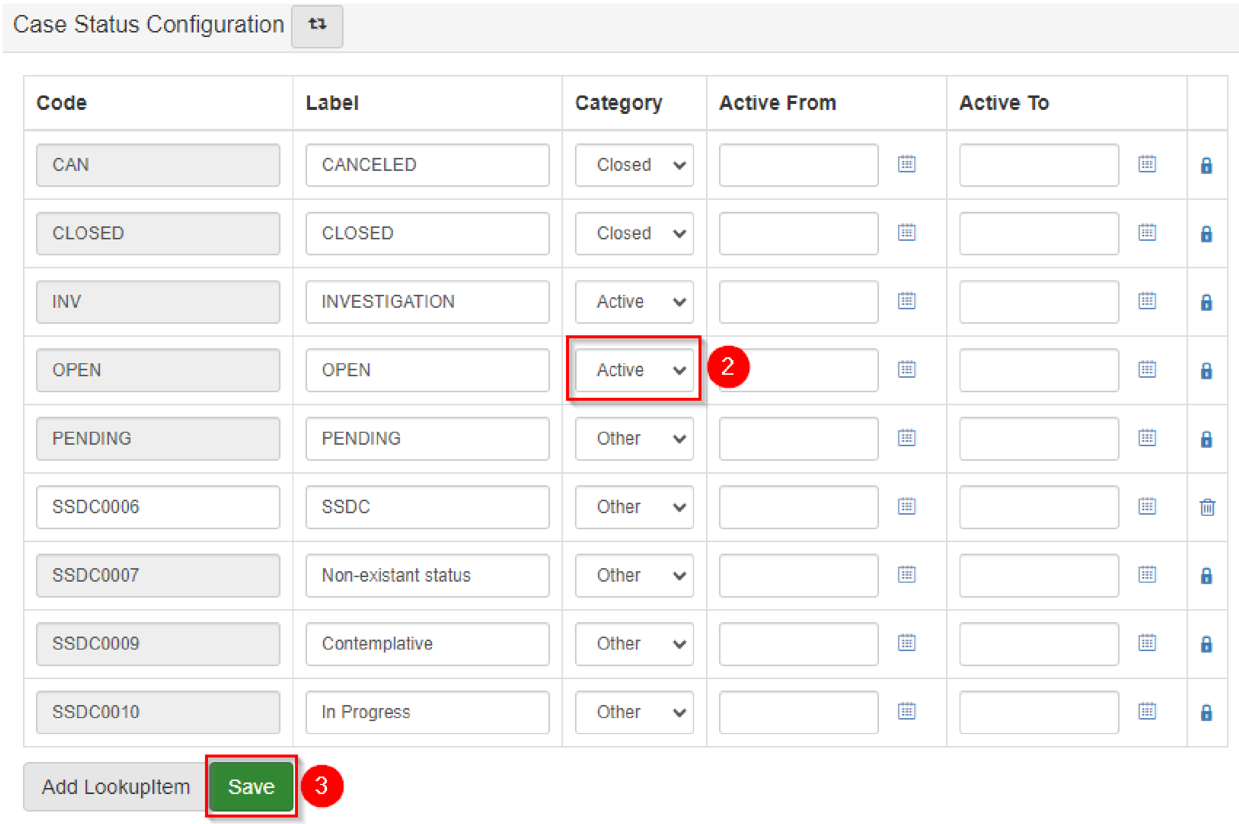
Defaults to **Case** statuses with a **Category** matching the **Status Category** field.

To set the **Category** of a **Case** status:

1. Navigate to **Left navigation › System Administration › Case Configuration › Case Status.**

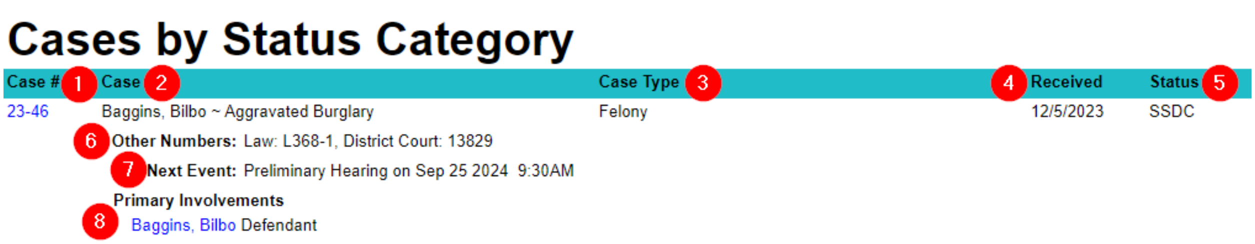


2. In the **Category** dropdown, select a category.
3. Click **[Save]**.



Case details

Each **Case** shows the following details:



1. **Case** number.
2. Name of the **Case**.
3. **Case** type.
4. Received date.
5. **Case** status.
6. Other numbers associated with the **Case**, if they exist. For example, a court docket number.
7. Next event on the case, if one exists.

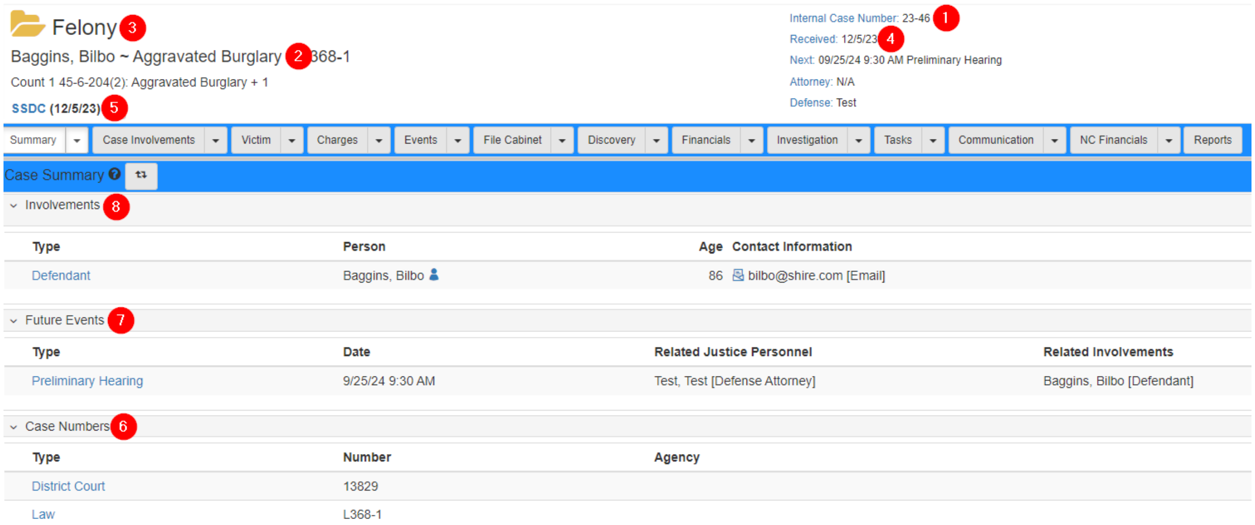
8. **Primary** involvements. A **Person** is considered a primary involvement if their **Case** involvement type has a **Category** of **Primary**.

The **Case #**, **Case**, **Case Type**, **Received**, and **Status** show in the header of the **Case Folder View**.

The other numbers show in the **Case Numbers** section of the **Summary** tab in the **Case Folder View**.

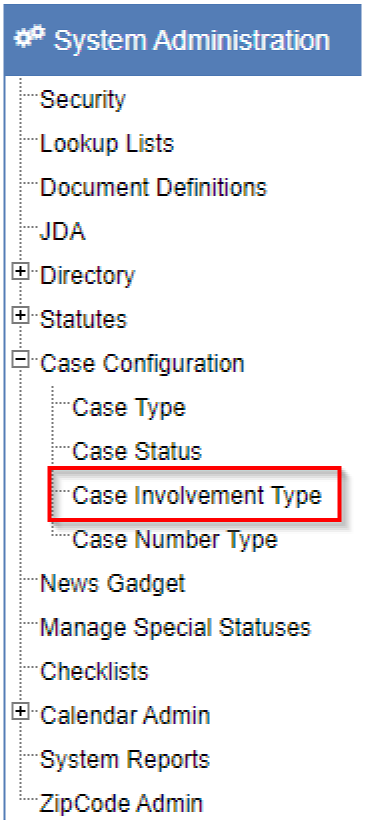
The next event shows in the **Future Events** section of the **Summary** tab in the **Case Folder View**.

The involvements show in the **Involvements** section of the **Summary** tab in the **Case Folder View**.

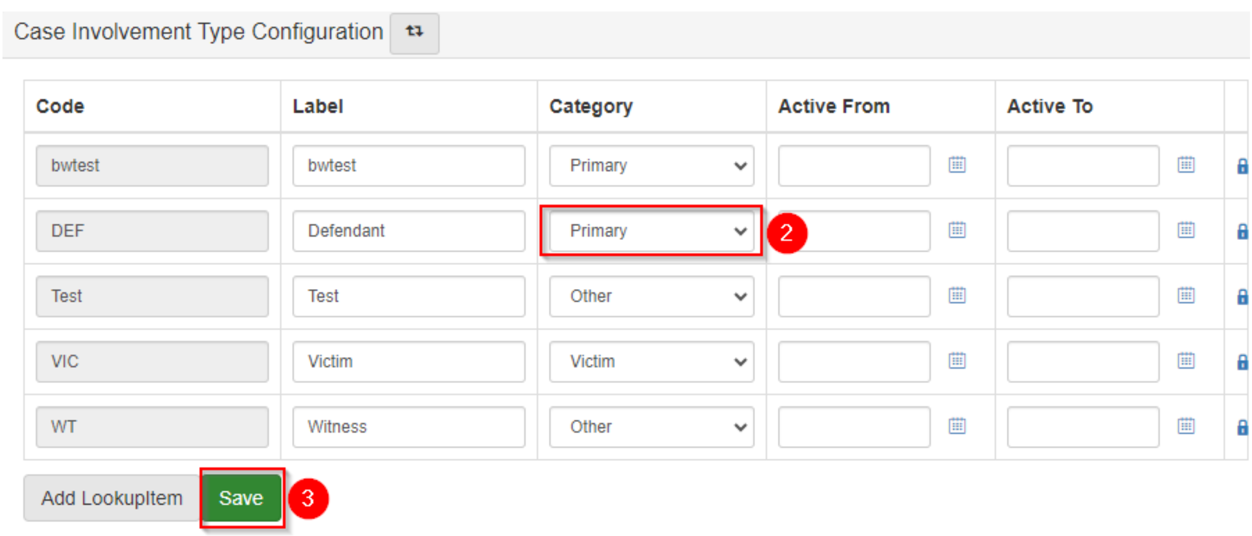


To set the **Category** of a **Case** involvement type:

1. Navigate to **Left navigation › System Administration › Case Configuration › Case Involvement Type**.



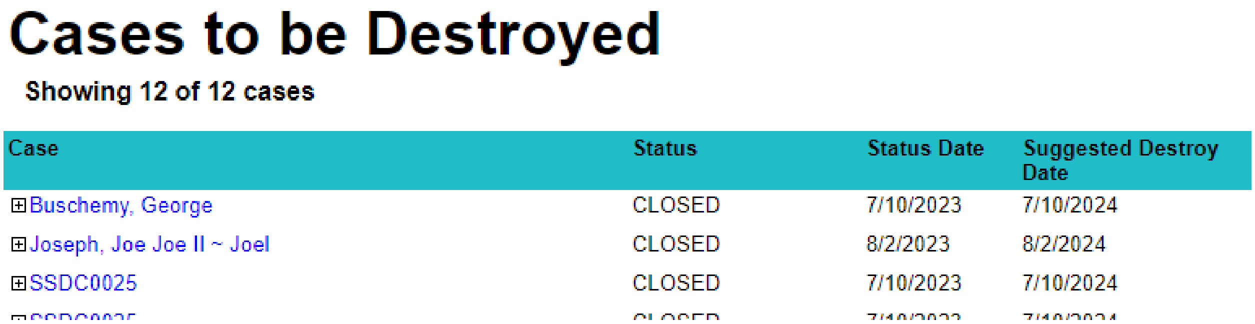
2. In the **Category** dropdown, select the desired **Category**.
3. Click **[Save]**.



Refer to Case involvements for more information.

Cases to be destroyed

This report shows a list of closed **Cases** recommended for manual deletion based on the time frame selected.


Cases to be Destroyed

Showing 12 of 12 cases

Case	Status	Status Date	Suggested Destroy Date
⊞Buschemy, George	CLOSED	7/10/2023	7/10/2024
⊞Joseph, Joe Joe II ~ Joel	CLOSED	8/2/2023	8/2/2024
⊞SSDC0025	CLOSED	7/10/2023	7/10/2024

Fields

Use the **Unit** and **Interval** fields to set the time frame for deletion recommendations. For example, if you select **Year(s)** option for **Unit** and enter 1 for the **Interval** you receive a list of **Cases** closed one year ago or earlier. Use the **Number of cases to show** to limit the number of **Cases** returned.

Selecting a large value for the **Number of cases to show** field may cause performance issues.

Unit

Unit of time. Available values are **Day(s)**, **Week(s)**, **Month(s)**, and **Year(s)**. Defaults to **Year(s)**.

Interval

Desired number of days, weeks, months, or years. Defaults to 1.

Number of cases to show

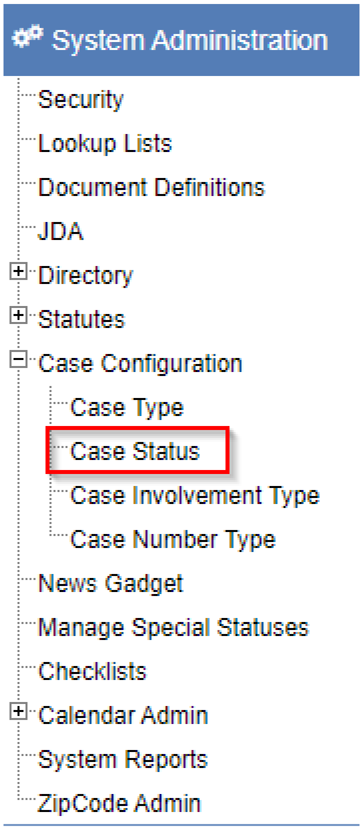
Defaults to 100.

Closed

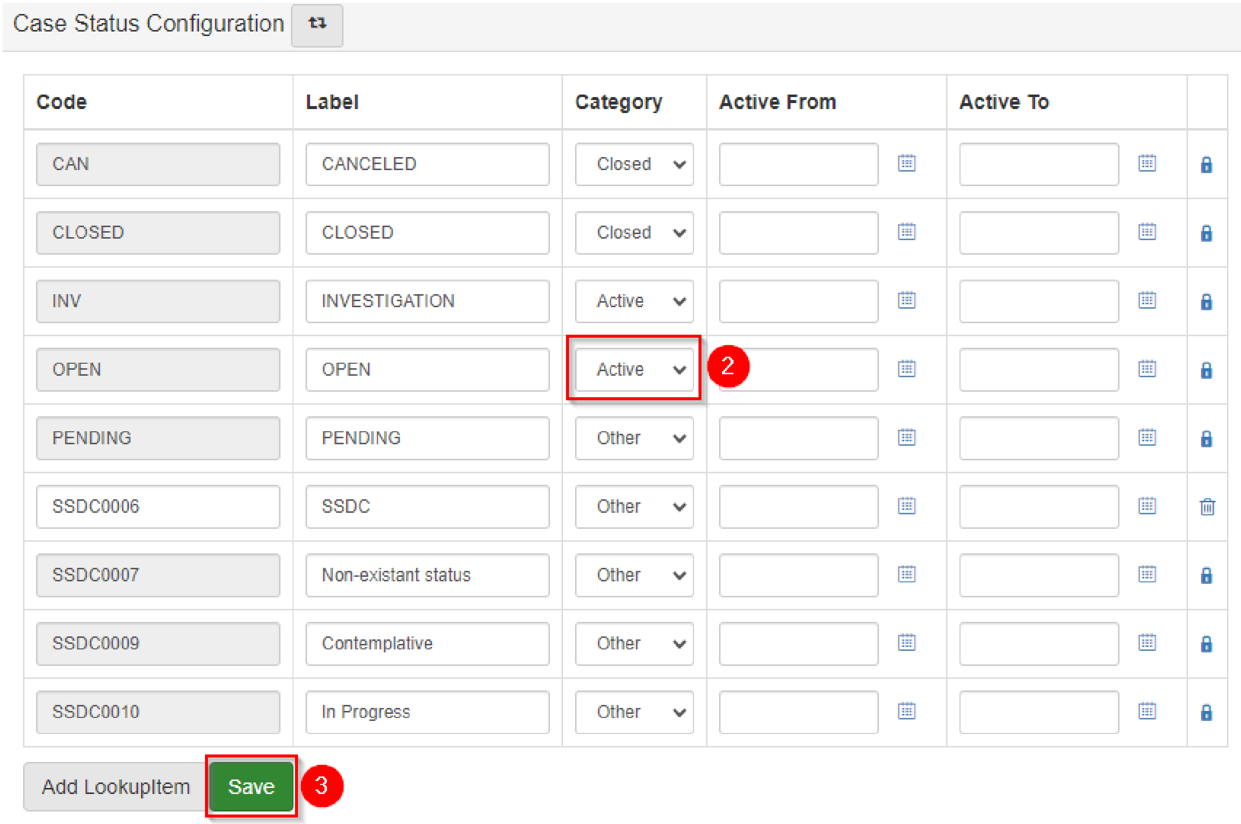
A **Case** is considered closed if the current **Case** status has a **Category** of **Closed**.

To set the **Category** of a **Case** status:

1. Navigate to **Left navigation › System Administration › Case Configuration › Case Status.**

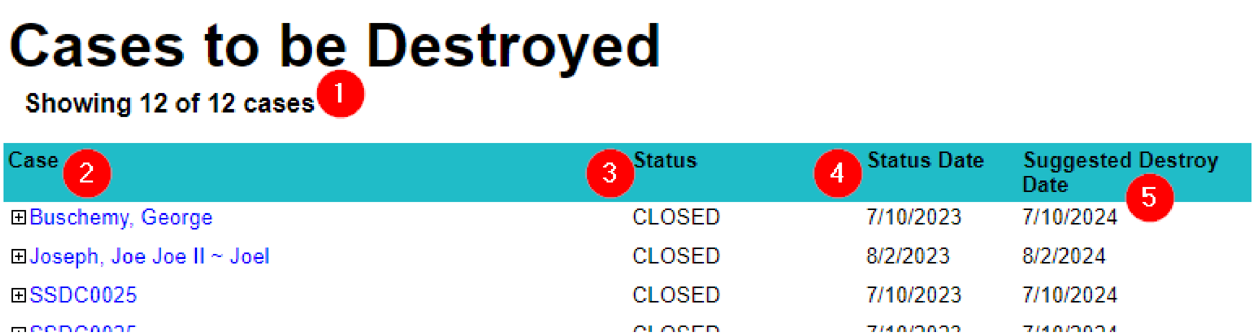


2. In the **Category** dropdown, select the **Category**.
3. Click **[Save]**.



Case details

The following details are provided to help you decide if a **Case** should be deleted:


Cases to be Destroyed

Showing 12 of 12 cases 1

Case 2	Status 3	Status Date 4	Suggested Destroy Date 5
⊞Buschemy, George	CLOSED	7/10/2023	7/10/2024
⊞Joseph, Joe Joe II ~ Joel	CLOSED	8/2/2023	8/2/2024
⊞SSDC0025	CLOSED	7/10/2023	7/10/2024

1. The number of **Cases** returned by the report compared to the number of **Cases** matching the selected time interval. This is to identify when the results are limited by the **Number of cases to show** field.
2. Name of the **Case**.
3. **Case** status.
4. Date of the current **Case** status.
5. Suggested destroy date. This is calculated by adding the time interval determined by the

Unit and **Interval** fields to the date of the current **Case** status. For example, if you select **Year(s)** option for **Unit** and enter 1 for the **Interval** the suggested destroy date is one year after the current **Case** status date.

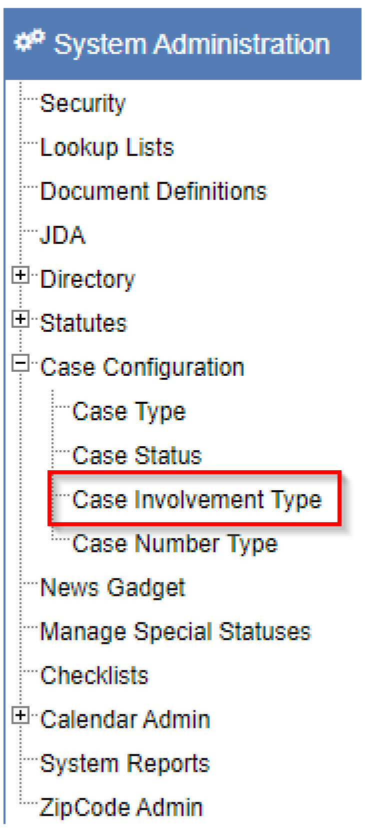
Primary involvements

Click the ⊞ next to a **Case** to show a list of primary involvements for the **Case**.

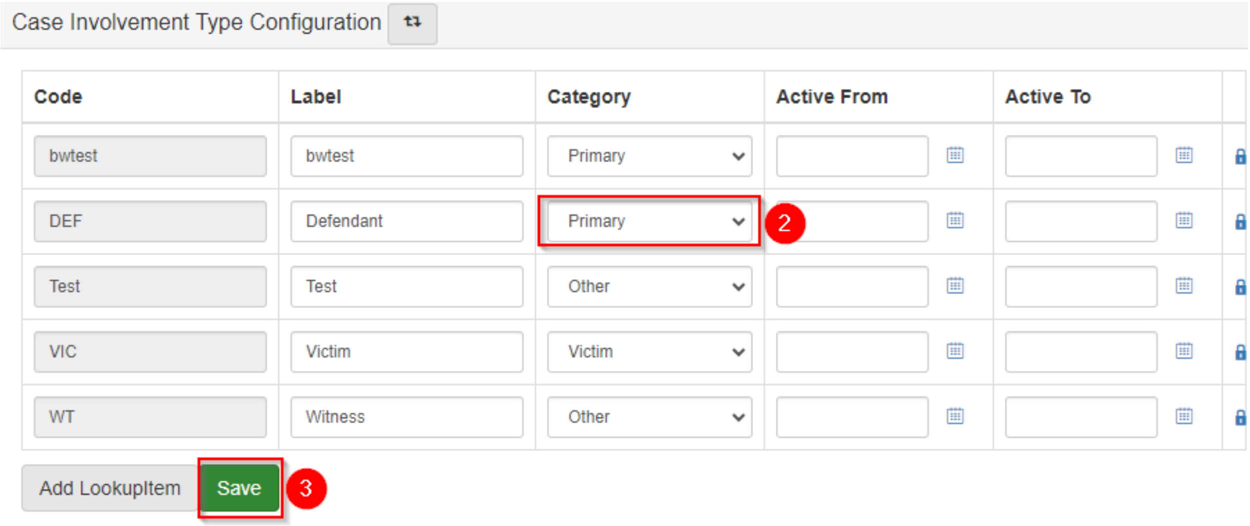
A **Person** is considered a primary involvement if their **Case** involvement type has a **Category** of **Primary**.

To set the **Category** of a **Case** involvement type:

1. Navigate to **Left navigation › System Administration › Case Configuration › Case Involvement Type**.



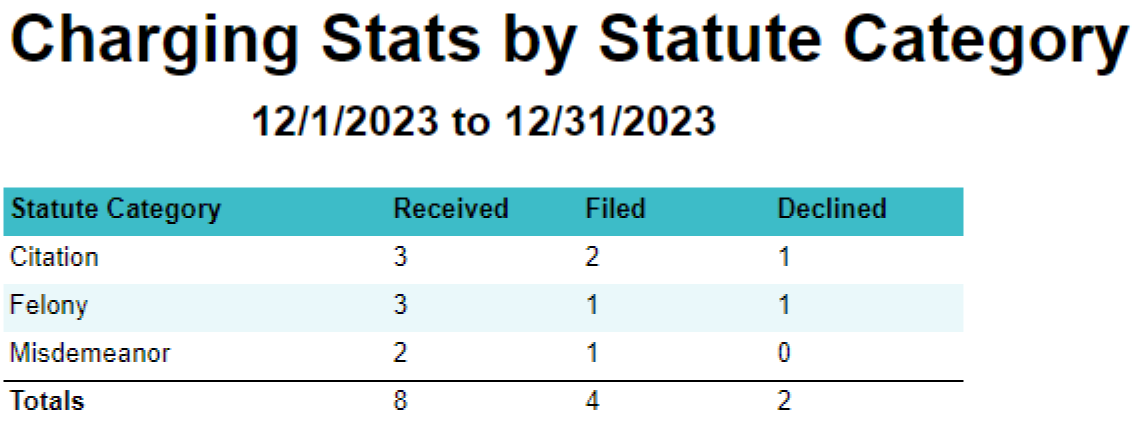
2. In the **Category** dropdown, select the **Category**.
3. Click **[Save]**.



Refer to Case involvements for more information about **Case** involvements.

Charging stats by statute category

This report shows the number of **Counts** filed and declined **Cases** received in a date range. The report shows these numbers by **Statute** category. Click a number in the **Summary** section to show a sub report with the associated **Counts**.



Charging Stats by Statute Category

12/1/2023 to 12/31/2023

Statute Category	Received	Filed	Declined
Citation	3	2	1
Felony	3	1	1
Misdemeanor	2	1	0
Totals	8	4	2

Fields

Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates. Use the **Statute category** field to show **Counts** with that category. Refer to Statutes for more information.

Start Date

Defaults to the first day of the previous month.

End Date

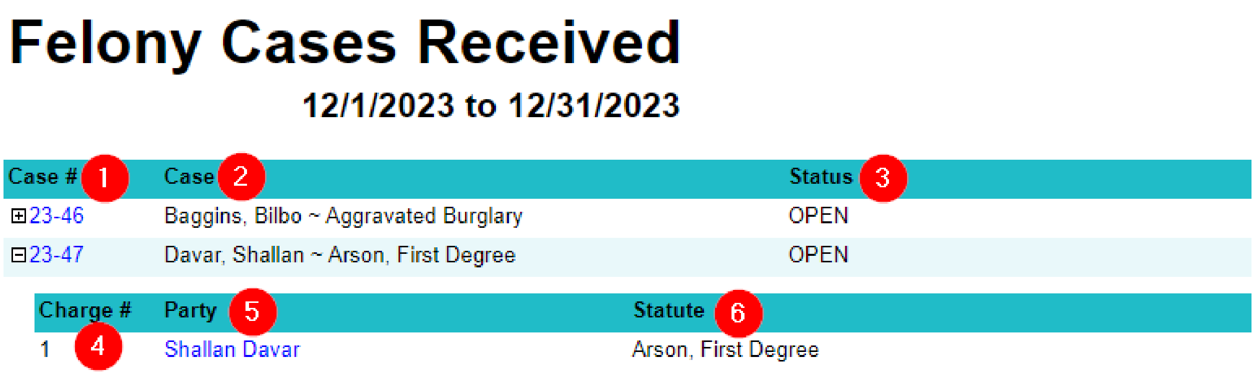
Defaults to the last day of the previous month.

Statute Category

Defaults to **Statute** categories assigned to **Counts** on **Cases** received between the **Start Date** and **End Date**.

Received

Click a number in the **Received** column to show the associated **Counts**. Each **Count** includes the following details, grouped by **Case**:

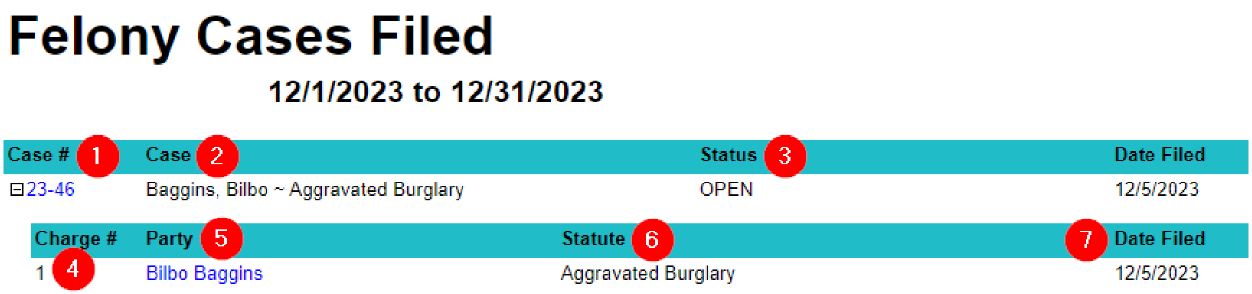


1. **Case** number.
2. Name of the **Case**.
3. **Case** status.
4. **Count** number.
5. **Person** linked to the **Count**.
6. **Statute** section name.

The **Case #** , **Case**, and **Status** show in the header of the **Case Folder View**. The **Charge #**, **Party**, and **Statute** show in the **Charges** tab in the **Case Folder View**.

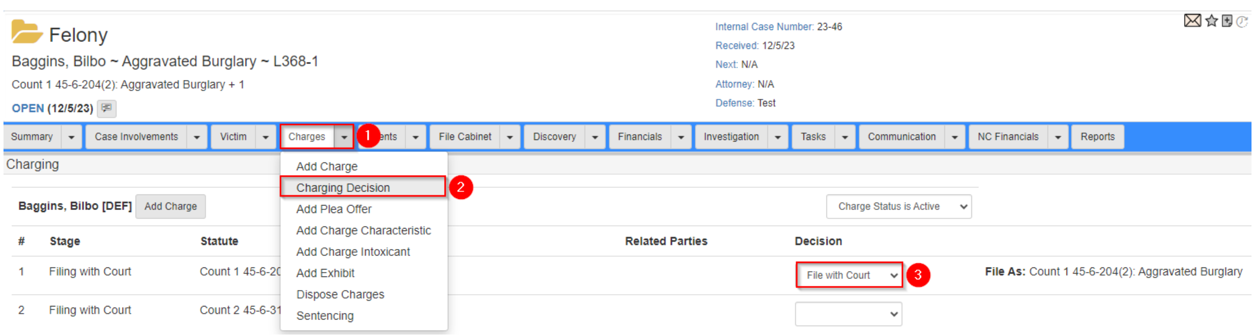
Filed

Click a number in the **Filed** column to show the associated **Counts**. Each filed **Count** shows the following details, grouped by **Case**:



1. **Case** number.
2. Name of the **Case**.
3. **Case** status.
4. **Count** number.
5. **Person** linked to the **Count**.
6. **Statute** section name.
7. Filed date for the **Count**.

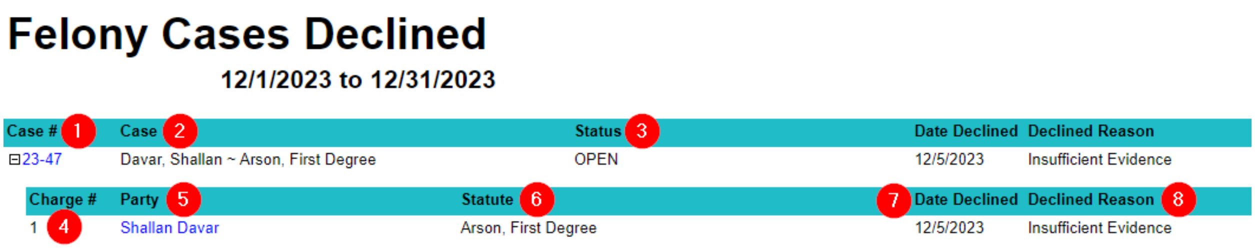
To set a **Count** as filed:



1. Navigate to a **Case**.
2. In the **Charges** dropdown, select **Charging Decision**.
3. In the **Decision** dropdown, select **File with Court**.

Declined

Click a number in the **Declined** column to show the associated **Counts**. Each declined **Count** shows the following details, grouped by **Case**:



Felony Cases Declined

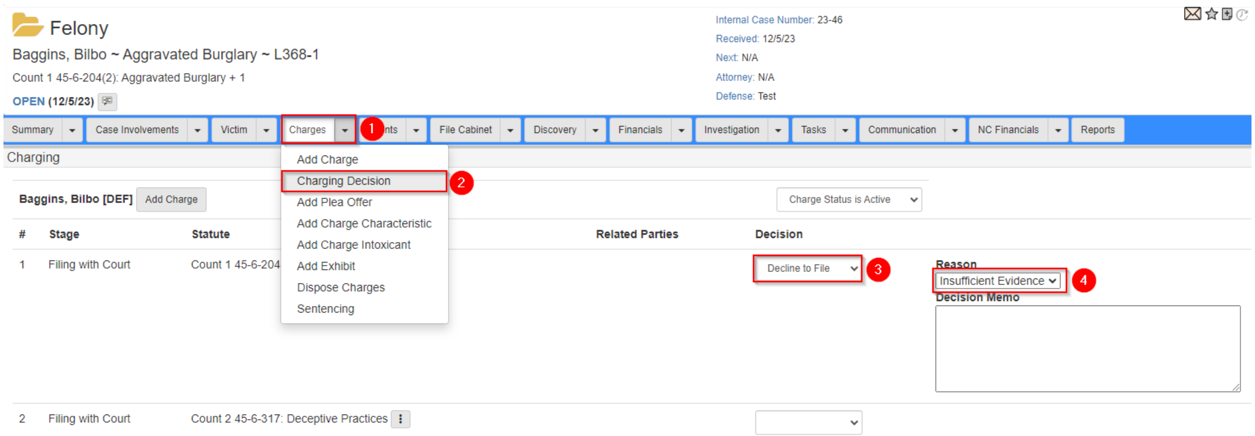
12/1/2023 to 12/31/2023

Case #	Case	Status	Date Declined	Declined Reason
23-47	Davar, Shallan ~ Arson, First Degree	OPEN	12/5/2023	Insufficient Evidence

Charge #	Party	Statute	Date Declined	Declined Reason
1	Shallan Davar	Arson, First Degree	12/5/2023	Insufficient Evidence

1. **Case** number.
2. Name of the **Case**.
3. **Case** status.
4. **Count** number.
5. **Person** linked to the **Count**.
6. **Statute** section name.
7. Declined date for the **Count**.
8. Declined reason for the **Count**.

To set a **Count** as declined:



1. Navigate to a **Case**.
2. In the **Charges** dropdown, select **Charging Decision**.
3. In the **Decision** dropdown, select **Decline to File**.
4. In the **Reason** dropdown, select the reason for declining.
5. Optional: in the **Decision Memo** field, add more details.

Declined cases

This report shows the number of declined **Cases** received in a date range.

Declined Cases

2 cases declined between 12/1/2023 and 12/31/2023

Case #	Case	Date Declined	Declined Reason	Decision Memo
⊞23-47	Davar, Shallan ~ Arson, First Degree	12/5/2023	Insufficient Evidence	Contradicting evidence
⊞23-48	Deer, John ~ abc123	12/14/2023	Insufficient Evidence	Not enough evidence.

Fields

Start Date 12/1/2023 End Date 12/31/2023 Case Type Civil,Felony

Use the **Start date** and **End date** fields to show **Cases** with a received date between those dates. Use the **Case Type** parameter to filter the **Cases** included by **Case** type.

Start Date

Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

Case Type

Defaults to **Case** types of **Cases** received between the **Start Date** and **End Date**.

Declined

A **Case** is included in this report when it meets the following conditions:

1. The received date is between the **Start Date** and **End Date**.
2. The **Case** type matches a value selected in the **Case Type** parameter.
3. The **Case** includes a declined **Count**.

The report shows the following details for each included **Case**:

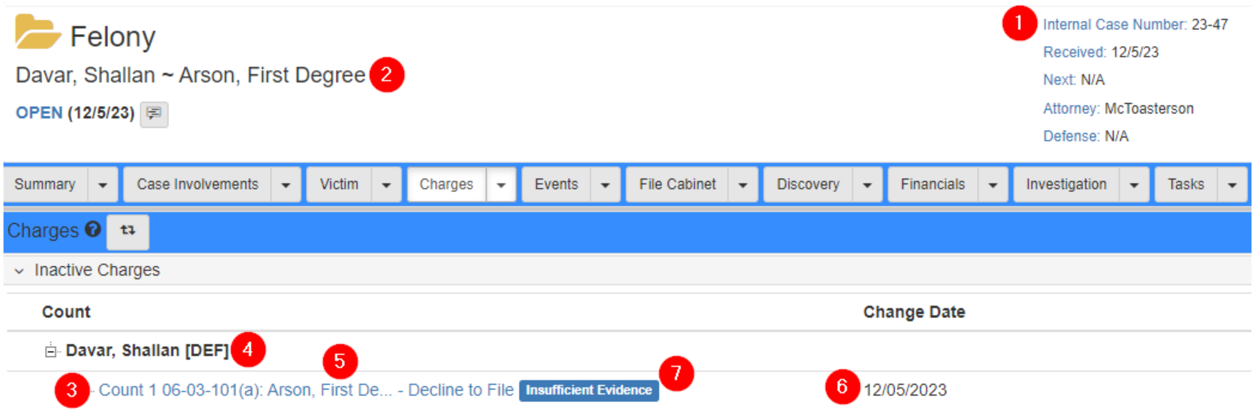
Case # 1	Case 2	Date Declined	Declined Reason	Decision Memo
⊟23-47	Davar, Shallan ~ Arson, First Degree	12/5/2023	Insufficient Evidence	Contradicting evidence

Count #	Party 4	Statute 5	6 Date Declined	Declined Reason 7	Decision Memo 8
1 3	Shallan Davar	Arson, First Degree	12/5/2023	Insufficient Evidence	Contradicting evidence

1. **Case** number.
2. Name of the **Case**.
3. **Count** number.
4. **Person** linked to the **Count**.
5. **Statute** section name.

6. Declined date for the **Count**.
7. Declined reason for the **Count**.
8. Decision memo for the **Count**.

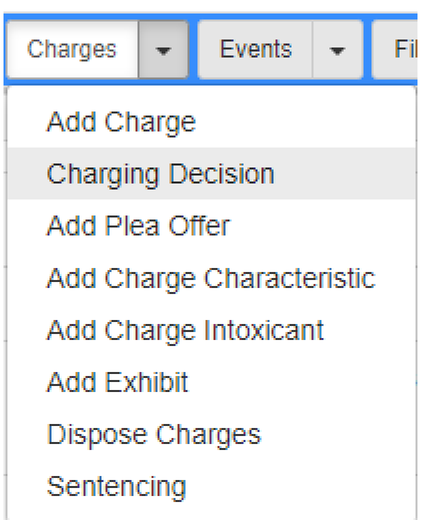
The **Case #** and **Case** show in the header of the **Case Folder View**. The **Count #**, **Party**, **Statute**, **Declined Date**, and **Declined Reason** show in the **Charges** tab in the **Case Folder View**.



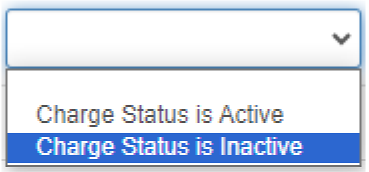
The **Decision Memo** shows in the **Charging** screen under the **Charges** tab in the **Case Folder View**.

To show the **Charging** screen:

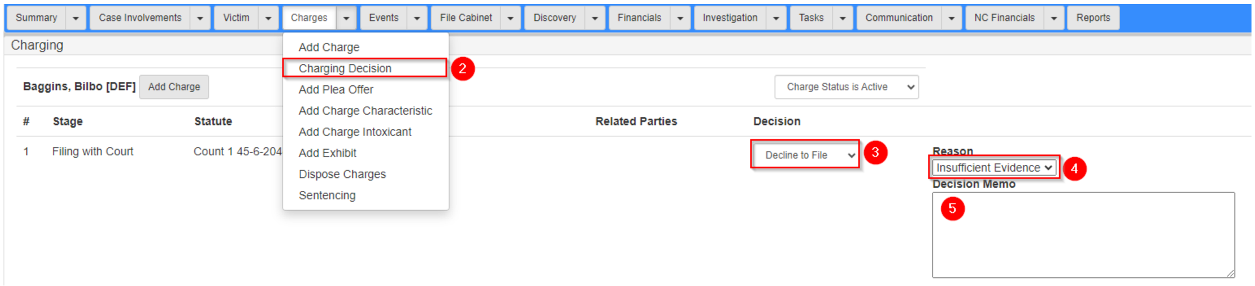
1. In the **Charges** dropdown, select **Charging Decision**:



2. In the **Charge Status** dropdown, select **Charge Status is Inactive**:



To set a **Count** as declined:



1. Navigate to a **Case**.
2. In the **Charges** dropdown, select **Charging Decision**.
3. In the **Decision** dropdown, select **Decline to File**.
4. In the **Reason** dropdown, select the reason for declining.
5. Optional: in the **Decision Memo** field, add more details.

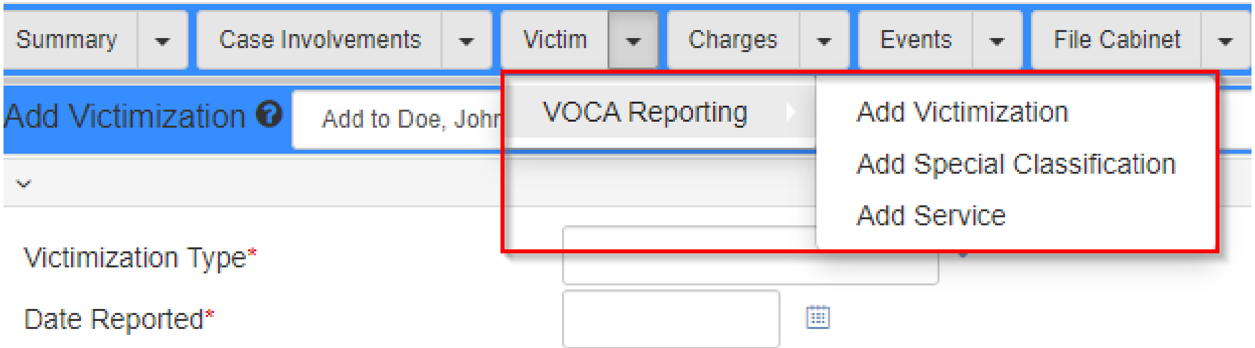
VOCA report

The Federal Victims of Crime Act (VOCA) report includes victimizations, special classifications, and services.

Add VOCA report items

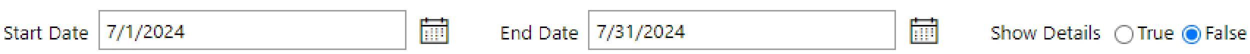
To add details to a VOCA report:

1. Open a **Case**.
2. In the **Victim** dropdown, select **VOCA Reporting**, then the type of detail to add.



Click the **Victim** tab so show the **Victim Folder View** and the VOCA report details.

Fields



Use the **Start Date** and **End Date** fields to filter the VOCA reported dates included in the report. Use the **Show Details** field to include links for **Case** and **Person** records in the report.

Start Date

Defaults to the first day of the previous month.

End Date

Defaults to the last day of the previous month.

Show Details

Defaults to **False**.

Report

The first section of the VOCA report shows population demographics, including ethnicity, gender, age, and special classifications:

VOCA Report

Date Reported between 1/1/2024 and 7/31/2024

I. Population Demographics

TOTAL number of individuals who received services during the reporting period 2

Race/Ethnicity	
Native American	0
Not Reported	2
Other	0
White	0
Gender Identity	
Female	0
Male	0
Not Reported	2

The second section of the VOCA report shows direct services:

II. Direct Services

A - Information & Referral		# of Individuals	0
A01	Information about the criminal justice process		0
A02	Information about victim rights, how to obtain notifications, etc		0

Self service data conversion

Overview

The Self service data conversion is a tool that allows you to convert data from an existing system into a structured format compatible with eProsecutor Online. The tool should help streamline the process of data insertion and ensure data consistency, while also removing the need for manual data entry.

File formats

The Self service data conversion only works with `.xls` and `.xlsx` file formats.

Converting from some other format

Export data with the correct field column headers (second row) in the correct order (see Case data fields) to a comma-separated file (`.csv`). Then open that file in Excel and save it as a `.xlsx`.

Excel does have limits on the size of file it can open. As a rule of thumb it is best to keep the `.csv` file size to less than 100 MB.

In this section

Import Excel data

Data entry and formatting

There can only be one case per row. Every item on that row relates to that case.

Required fields

Entities have some required fields. These fields are marked by an asterisk (*), but not every required field is required for a successful submission of that entity.

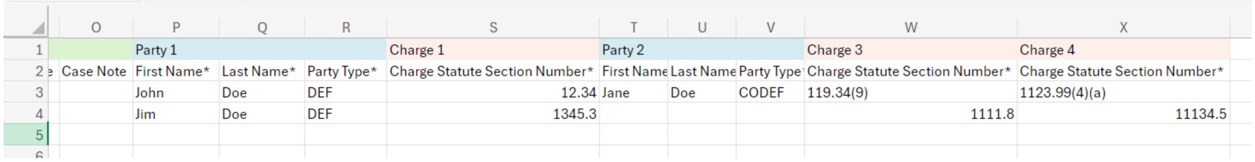
For example:

A party on a case has no contact information. This can be submitted by filling out the **First Name**, **Last Name**, and **Party Type** fields for the party. To successfully add an address to this party, enter an address in the **Address Line 1** field. Refer to https://documentation.journaltech.com/eProsecutorOnline/admin/self_service_data_conversion/case_data.html for more details.

Entity order

The relationship between entities on each row is determined by the order they appear in the file.

For example:



	O	P	Q	R	S	T	U	V	W	X
1		Party 1			Charge 1	Party 2			Charge 3	Charge 4
2	Case Note	First Name*	Last Name*	Party Type*	Charge Statute Section Number*	First Name	Last Name	Party Type	Charge Statute Section Number*	Charge Statute Section Number*
3		John	Doe	DEF	12.34	Jane	Doe	CODEF	119.34(9)	1123.99(4)(a)
4		Jim	Doe	DEF	1345.3				1111.8	11134.5
5										

Row three of the spreadsheet has two parties, `John` and `Jane`. **Charge 1** is associated with `John` and **Charge 3** and **Charge 4** are associated with `Jane`. Row four of the spreadsheet only has one party, `Jim`. Since the **Party 2** section is blank on row four, all the charges are associated with `Jim`.

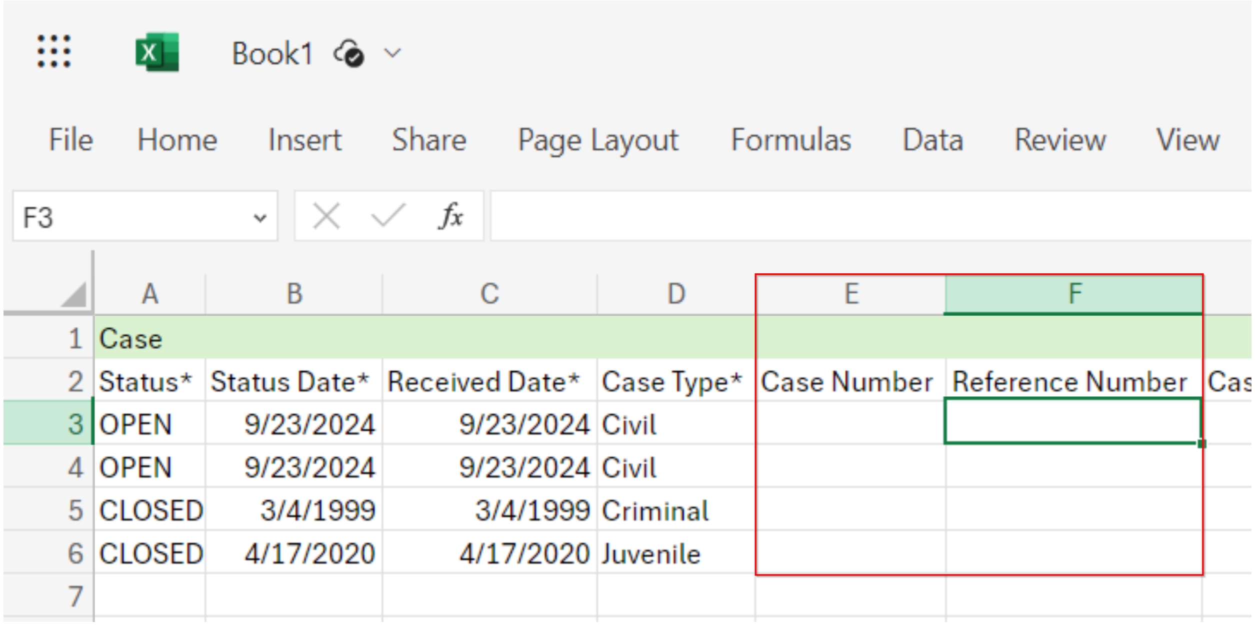
Empty entity sections

Not all cases are alike and some cases have fewer entities than others. These sections can be skipped or omitted. Refer to Entity order for more information.

Empty columns

To improve the readability of the spreadsheet, you can remove columns. If none of the cases in the document use a column, you can remove a column if it is not required.

For example:



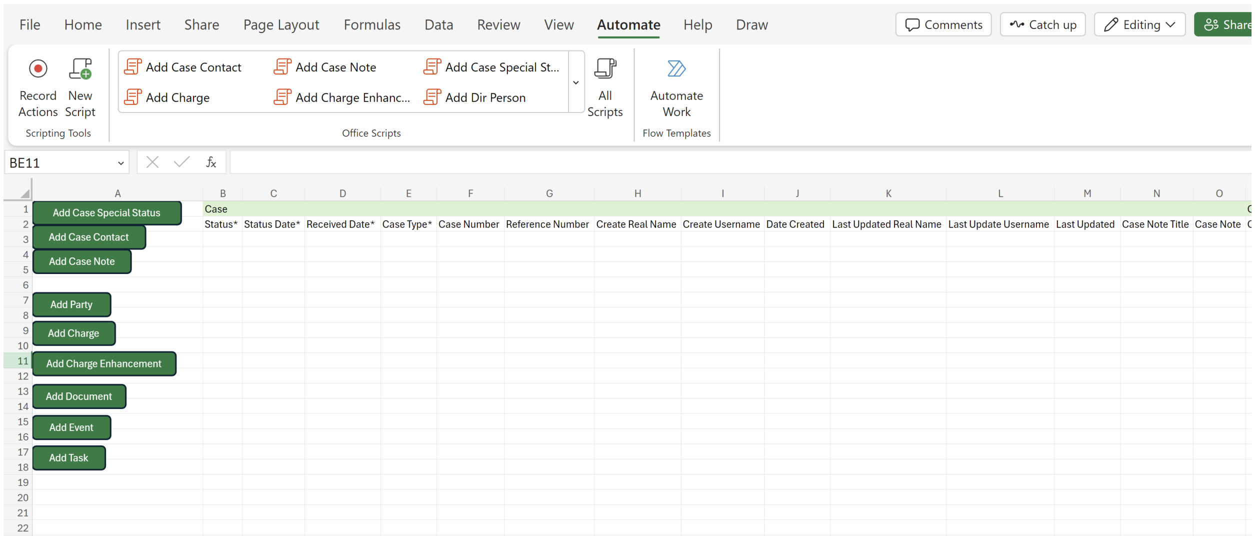
	A	B	C	D	E	F
1	Case					
2	Status*	Status Date*	Received Date*	Case Type*	Case Number	Reference Number
3	OPEN	9/23/2024	9/23/2024	Civil		
4	OPEN	9/23/2024	9/23/2024	Civil		
5	CLOSED	3/4/1999	3/4/1999	Criminal		
6	CLOSED	4/17/2020	4/17/2020	Juvenile		
7						

None of the cases have data for **Case Number** or **Reference Number**. You could delete these columns.

Case data worksheet

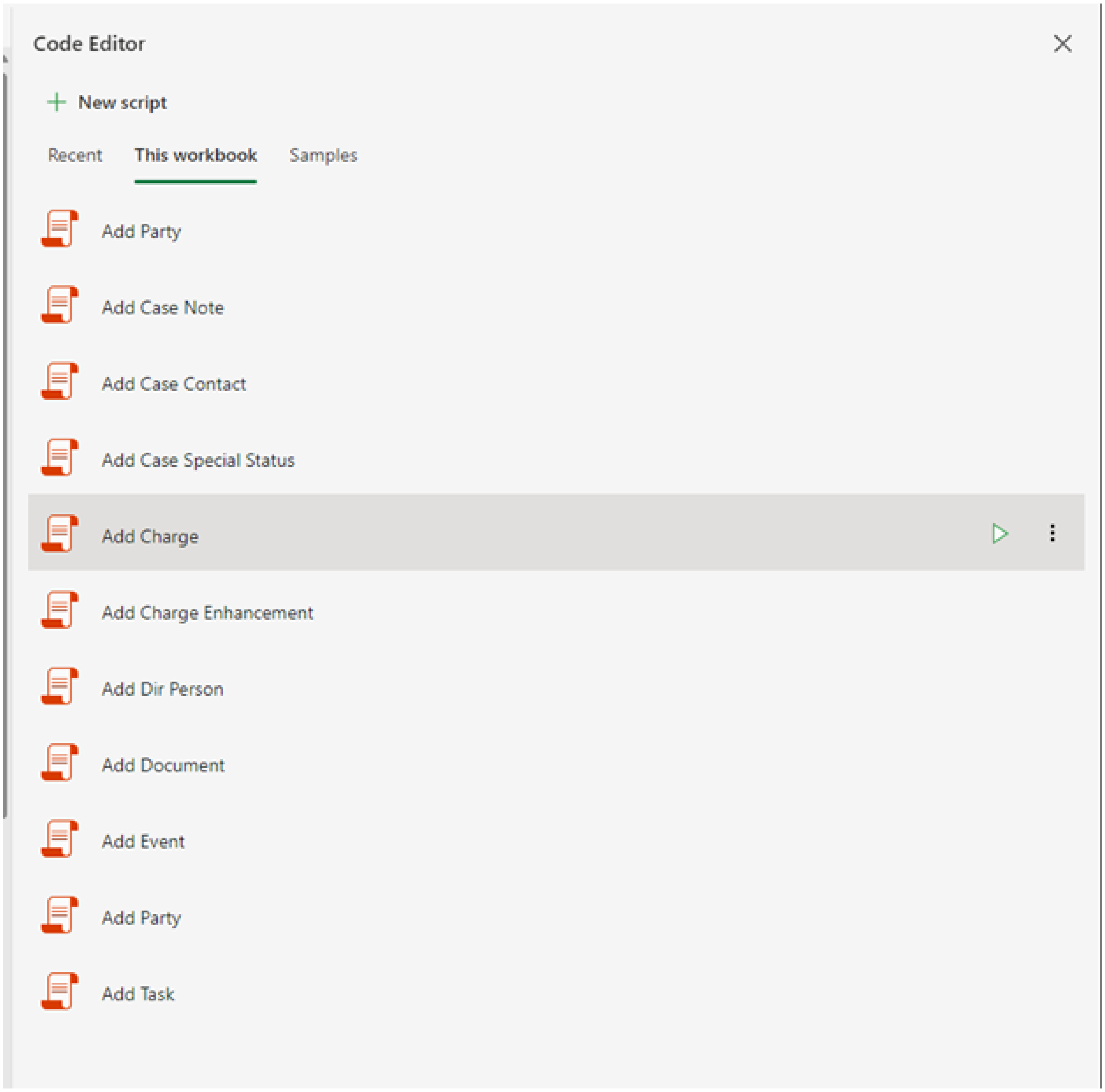
This Excel sheet serves as a data input tool for eProsecutor Online, designed to streamline the process of converting data into a structured format compatible with the Self Service Data Conversion. The sheet includes macros to automate the addition of headers and columns, ensuring data consistency and ease of integration with eProsecutor Online.

All fields denoted with an asterisk (*) at the end of the field are required to be uploaded for an item or case to be uploaded to eProsecutor Online.



The case data worksheet comes ready with a Case header and all the fields required to build a case with nothing else on it. For an explanation of the fields see Case Data Fields.

Other items may be placed on a case using macros or buttons inside the Excel sheet. Click the buttons to append whatever is needed, or navigate to the **Automate** tab at the top of the Excel ribbon and select individual macros inside the scripts tab. The following scripts allow you to add all the following:



As mentioned on the https://documentation.journaltech.com/eProsecutorOnline/admin/self_service_data_conversion/index.html landing page some entities are required to be added before others. Example: A charge is associated with the party that is directly left of it, and a charge enhancement is associated with the charge that is left of it. If charges are out of order, it may be uploaded incorrectly to the eProsecutor Online instance.

Case data fields

An entity is an object in eProsecutor Online that reflects a distinct state of a **Case** or

Person. Listed are all the entities and their fields that you can upload using the self-service data conversion tool.

Case

Field	Data Type	Required
Status	String	Yes
Status Date	DateTime	Yes
Received Date	DateTime	Yes
Case Type	String	Yes
Case Number	String	No
Reference Number	String	No

CaseSeal

In the Excel sheet you want to import, the **Case** data must be in columns that precede the **CaseSeal** columns.

Field	Data Type	Required
Case Seal Type	String	Yes
Case Seal Effective From	DateTime	No
Case Seal Effective To	DateTime	No

CaseSpecialStatus

In the Excel sheet you want to import, the **Case** data must be in columns that precede the **CaseSpecialStatus** columns.

Field	Data Type	Required
Case Special Status Type	String	Yes
Case Special Status Category	String	No
Case Special Status Value	String	No

Case Special Status Start Date	DateTime	No
Case Special Status End Date	DateTime	No
Case Special Status Memo	String	No

Person

Field	Data Type	Required
Name Prefix	String	No
First Name	String	Yes
Middle Name	String	No
Last Name	String	Yes
Name Suffix	String	No
Organization	String	No
Person Status	String	No
Person Type	String	No

Party

In the Excel sheet you want to import, the **Case** and **Person** data must be in columns that precede the **Party** columns.

Field	Data Type	Required
Party Type	String	Yes
Party Status	String	No
Party Start Date	DateTime	No
Party Number	String	No
Party Note	String	No

Address

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **Address** columns.

Field	Data Type	Required
Address Type	String	No
Address Line 1	String	Yes
Address Line 2	String	No
Zip	String	No
City	String	No
State	String	No
Effective From	DateTime	No
Effective To	DateTime	No
Address Notes	String	No

Charge

In the Excel sheet you want to import, the **Case** and **Party** data must be in columns that precede the **Charge** columns.

Field	Data Type	Required
Charge Statute Section Number	ForeignKey	Yes
Charge Disposition Type	String	No
Charge Disposition Date	DateTime	No
Charge Declination Memo	String	No
Charge Disposition Reason	String	No
Charge Count	Integer	No
Charge Date	DateTime	No
Charge End Date	DateTime	No

Charge Stage Added	String	No
Charge Status	String	No

SubCharge

In the Excel sheet you want to import, the **Charge** data must be in columns that precede the **SubCharge** columns.

Field	Data Type	Required
Enhancement Statute Section Number	ForeignKey	Yes
Enhancement Notes	String	No

Ce_ChargeIntoxicant

In the Excel sheet you want to import, the **Charge** data must be in columns that precede the **Ce_ChargeIntoxicant** columns.

Field	Data Type	Required
Charge Intoxicant Type	String	Yes
Charge Intoxicant Level	String	No
Charge Intoxicant Notes	String	No

ChargeCharacteristic

In the Excel sheet you want to import, the **Charge** data must be in columns that precede the **ChargeCharacteristic** columns.

Field	Data Type	Required
Charge Characteristic	String	Yes
Charge Characteristic Type	String	No
Charge Characteristic Value	String	No

Sentence

In the Excel sheet you want to import, the **Charge** data must be in columns that precede the

Sentence columns.

Field	Data Type	Required
Sentence Type	String	Yes
Sentence Min Length	Double	No
Sentence Max length	Double	No
Sentence Unit	String	No
Sentence Amount $	Double	No
Sentence Reduced To $	Double	No
Sentence Notes	String	No
Sentence Credit Length	Double	No
Sentence Credit Unit	String	No
Sentence Credit Notes	String	No
Sentence Amount Suspended	Double	No
Sentence Suspend Length	Double	No
Sentence Suspend Unit	String	No
Sentence Suspend Notes	String	No

SentenceCondition

In the Excel sheet you want to import, the **Sentence** data must be in columns that precede the **SentenceCondition** columns.

Field	Data Type	Required
Sentence Condition Type	String	Yes
Sentence Condition Length	Double	No
Sentence Condition Length Unit	String	No
Sentence Condition Begin Date	DateTime	No

Sentence Condition Location	String	No
Sentence Condition Amount $	Double	No
Sentence Condition Status	String	No
Sentence Condition Status Date	DateTime	No
Sentence Condition Notes	String	No

Telephone

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **Telephone** columns.

Field	Data Type	Required
Telephone Number	String	Yes
Telephone Type	String	No
Telephone Effective From	DateTime	No
Telephone Effective To	DateTime	No
Telephone Notes	String	No

PersonProfile

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **PersonProfile** columns.

Field	Data Type	Required
Date of Birth	DateTime	No
Gender	String	No
Hair Color	String	No
Eye Color	String	No
Height	String	No

Weight	Int	No
Ethnicity	String	No
Primary Language	String	No

CaseContact

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **CaseContact** columns.

Field	Data Type	Required
Email Type	String	No
Email	String	No
Email Effective From	DateTime	No
Email Effective To	DateTime	No
Email Notes	String	No

OtherCaseNumber

In the Excel sheet you want to import, the **Case** data must be in columns that precede the **OtherCaseNumber** columns.

Field	Data Type	Required
Other Case Number	String	Yes
Other Number Type	String	No
Other Number Lead	Boolean	No
Other Number Active	Boolean	No

Identification

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **Identification** columns.

Field	Data Type	Required
Identification Number	String	Yes

Identification Type	String	Yes
Identification Issuer State	String	No
Identification Status	String	No
Identification Class	String	No
Identification Issuer Notes	String	No

DocDef

Field	Data Type	Required
Case Document Docdef Description	String	No
Case Document DocDefName	String	Yes
Case Document DocDefNumber	String	Yes
Case Document ShortName	String	Yes

Document

In the Excel sheet you want to import, the **Case** and **DocDef** data must be in columns that precede the **Document** columns.

Field	Data Type	Required
Case Document File Path	String	Yes
Case Document Name Exact	String	No
Case Document Original File Name	String	No
Case Document Review Status	String	No
Case Document Review Status Date	DateTime	No

CaseNote

In the Excel sheet you want to import, the **Case** data must be in columns that precede the **CaseNote** columns.

Field	Data Type	Required
Case Note Title	String	No
Case Note	String	No

ChargeNote

In the Excel sheet you want to import, the **Case** and **Charge** data must be in columns that precede the **ChargeNote** columns.

Field	Data Type	Required
Charge Note Title	String	No
Charge Note	String	No

PleaOffer

In the Excel sheet you want to import, the **Party** data must be in columns that precede the **PleaOffer** columns.

Field	Data Type	Required
Plea Offer Type	String	Yes
Plea Offer Expiration Date	DateTime	No
Plea Offer Status	String	No
Plea Offer	String	Yes

ScheduledEvent

In the Excel sheet you want to import, the **Case** data must be in columns that precede the **ScheduledEvent** columns.

Field	Data Type	Required
Event Type	String	Yes

Event Start	DateTime	Yes
Event End	DateTime	No
Event Result Type	String	No
Event Category	String	No

EventNote

In the Excel sheet you want to import, the **Case** and **ScheduledEvent** data must be in columns that precede the **CaseNote** columns.

Field	Data Type	Required
Event Note Title	String	No
Event Note	String	No

PersonNote

In the Excel sheet you want to import, the **Person** data must be in columns that precede the **PersonNote** columns.

Field	Data Type	Required
Person Note Type	String	No
Person Note	String	No
Person Note Date	DateTime	No

DirOrgUnit

Field	Data Type	Required
Directory Organization Type	String	Yes
Directory Organization Name	String	Yes

DirPerson

In the Excel sheet you want to import, the **DirOrgUnit** data must be in columns that precede the **DirPerson** columns.

Field	Data Type	Required
Directory Person Role	String	Yes
Directory Person First Name	String	Yes
Directory Person Middle Name	String	No
Directory Person Last Name	String	Yes
Directory Person Email	String	No

CaseAssignment

In the Excel sheet you want to import, the **Case** and **DirPerson** data must be in columns that precede the **CaseAssignment** columns.

Field	Data Type	Required
Case Assignment Role	String	Yes
Case Assignment Date Assigned	DateTime	Yes
Case Assignment Status	String	Yes
Case Assignment Notes	String	No

DirIdentification

In the Excel sheet you want to import, the **DirPerson** data must be in columns that precede the **DirIdentification** columns.

Field	Data Type	Required
Directory Identification Number	String	Yes
Directory Identification Type	String	Yes
Directory Identification Active	Boolean	No

Directory Note	**Identification**	String	No

ChecklistItem

In the Excel sheet you want to import, the **Case** and **DirPerson** data must be in columns that precede the **ChecklistItem** columns.

Field	Data Type	Required
Task Type	String	No
Task Instructions	String	Yes
Task Due Date	DateTime	No
Task Suspended	Boolean	No
Task Completed	Boolean	No
Task Status	String	No

Statute data worksheet

This Excel worksheet serves as the location to add new statutes to eProsecutor Online. For field definitions, see Statute data fields.

Statute data fields

Field	Data Type	Required
Statute Config Code	String	Yes
Statute Section Name	String	Yes
Statute Section Number	String	Yes
Statute Status	String	Yes
Statute Classification	String	No
Statute Description	String	No
Statute Section Code	String	No
Statute Section Short Name	String	No

Statute Source	String	No
Statute Language	String	No
Statute of Limitations	Integer	No
Statute Subcategory	String	No

Running the conversion

Overview

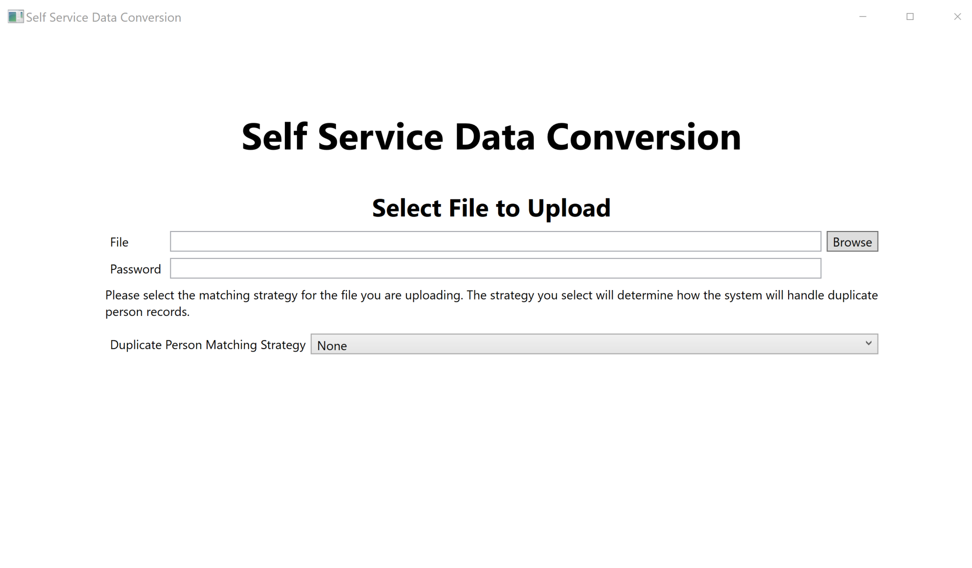
Once the data is prepared and moved into the provided Excel template, the data conversion process can start. This guide shows you how to run the Self Service Data Conversion tool and explains the screens and options available to you.

Procedure

1. On launch, the Self Service Data Conversion tool prompts you to start a new conversion or continue a conversion from a previously saved state:

Click **[New Conversion]** to start a new conversion or **[Continue Conversion]** to resume a conversion from a previously saved state.

If you want to resume a conversion, select the database file from the previous conversion. Once selected, the conversion resumes from the last saved state.



Click **[Browse]** to select the Excel file with your case data.

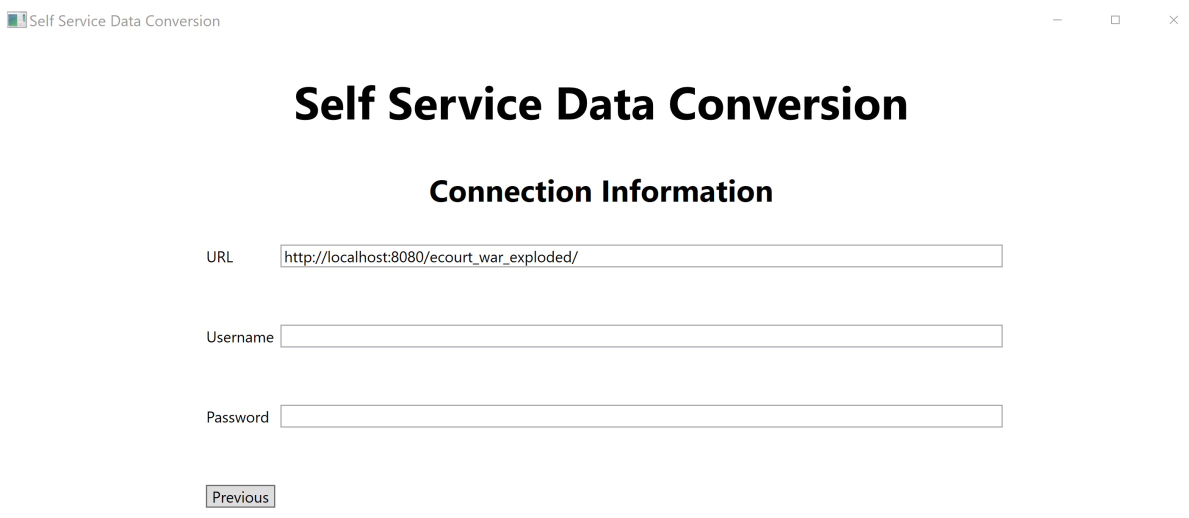
If your file uses a password, enter it in the **Password** field.

2. In the **Duplicate** dropdown, select the appropriate matching strategy.

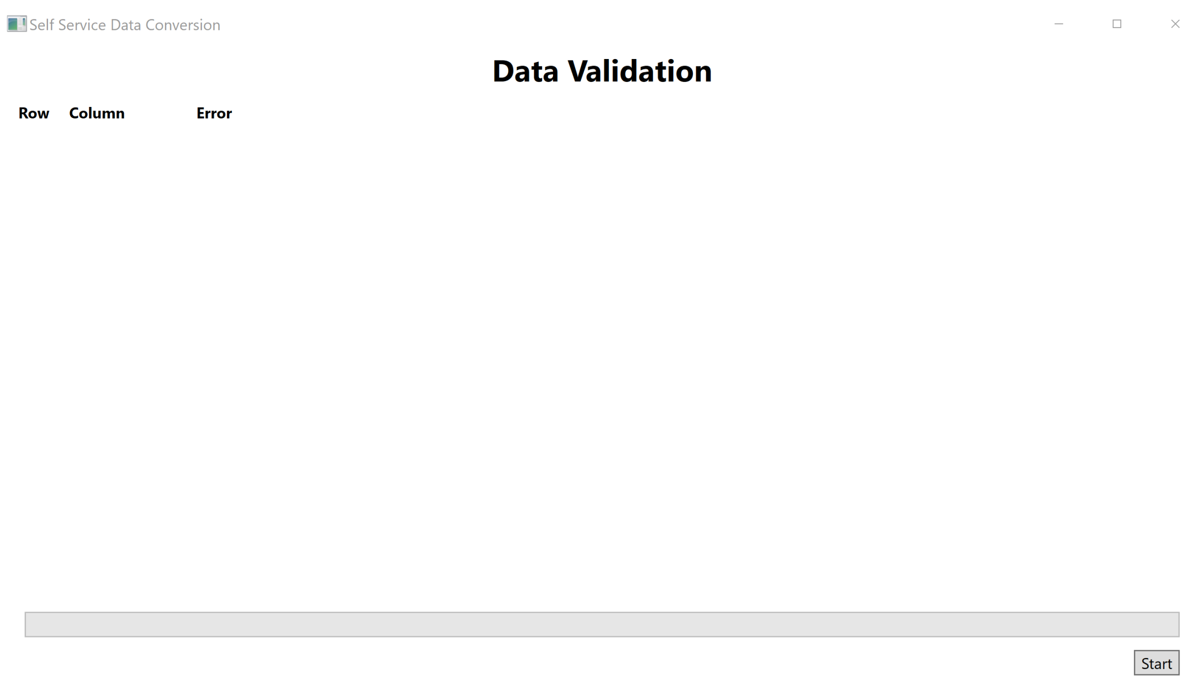
   The Self Service Data Conversion tool provides several matching strategies to handle duplicate **Person** fields:

   - **None**: Do not try to match duplicate **Persons** and treat them each as a unique **Person**.
   - **Identification**: Match duplicate **Persons** only if they have matching identification records (such as driver's license, SSN).
   - **FirstMiddleLast**: Match duplicate **Persons** only if they have matching first, middle, and last names.

3. Click **[Next]**.



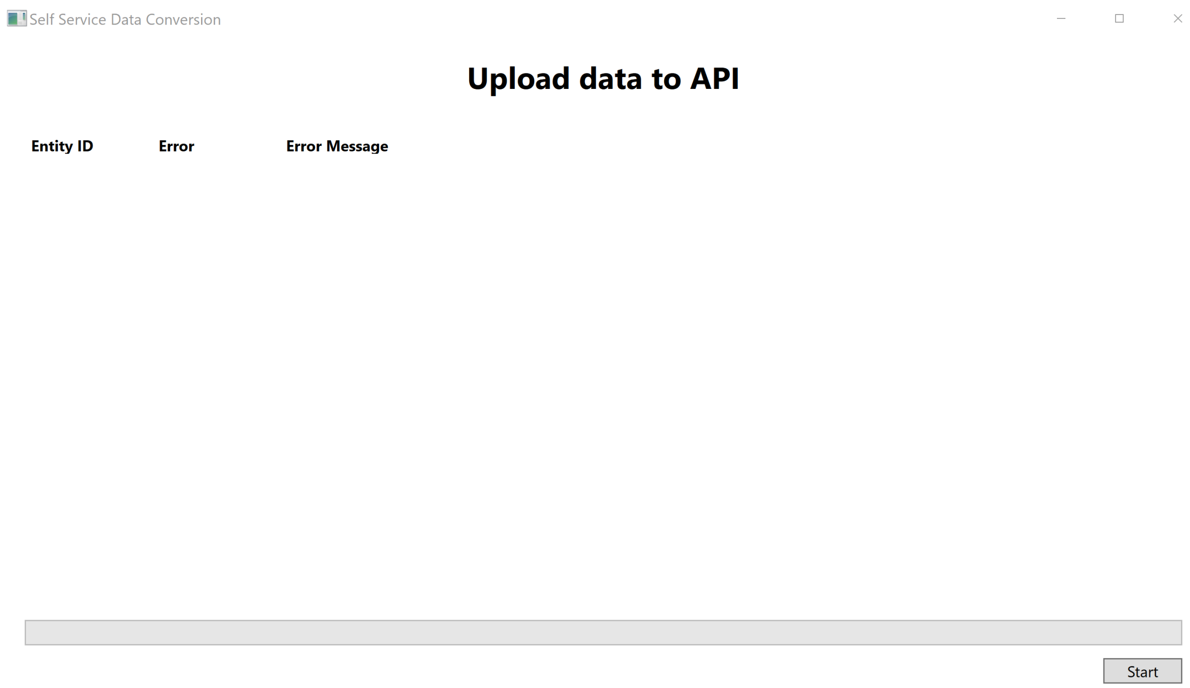
4. Enter the connection information for your eProsecutor Online instance:
    - **URL**: The URL of your eProsecutor Online instance (including `https://`).
    - **Username**: The username you use to log in.
    - **Password**: The password you use to log in.
5. Click **[Next]**.



On the data validation screen, the uploaded data is checked for errors and validated against existing data from eProsecutor Online to check for conflicts with statutes, **DirPersons**, or other data that may cause unique key collisions. Data that fails validation is shown in the table with an error message.

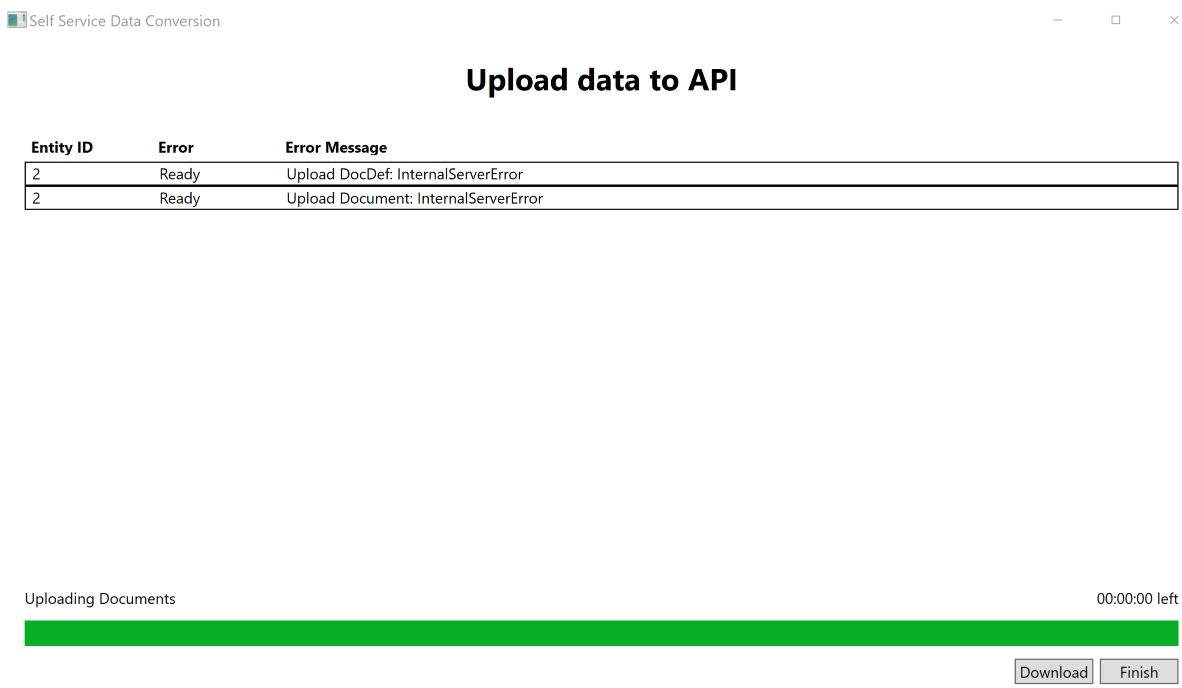
During the data validation process, the tool does not allow you to pause or cancel. You must wait for validation to complete.

6. Click **[Next]**.



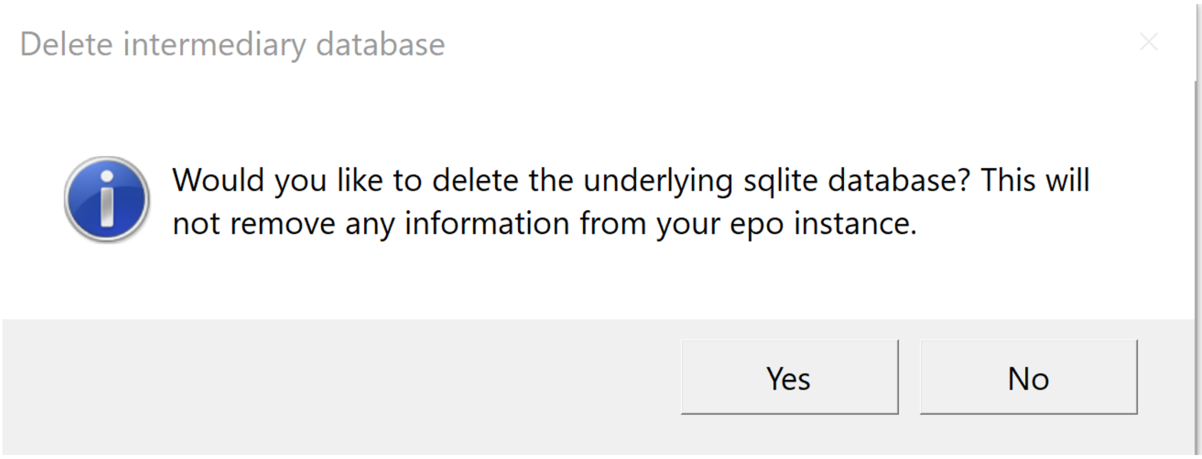
The data upload screen shows the data upload progress. This process may take some time depending on the size of your data import. If the process interrupts workflow, you can pause, cancel, and resume the upload later. When canceling, the tool allows you save the current state of the data upload or to discard the data. When the data is saved, you can relaunch the tool and continue the conversion from the start screen.

During the upload to eProsecutor Online, errors that occur are reported to show what data is not submitted.



Once all upload attempts complete, you can download an Excel spreadsheet of errors that occurred by clicking **[Download]**. Analyze the spreadsheet, fox the issues, and run the download again.

Once all data is uploaded, click **[Finish]** to complete the conversion process and close the app.

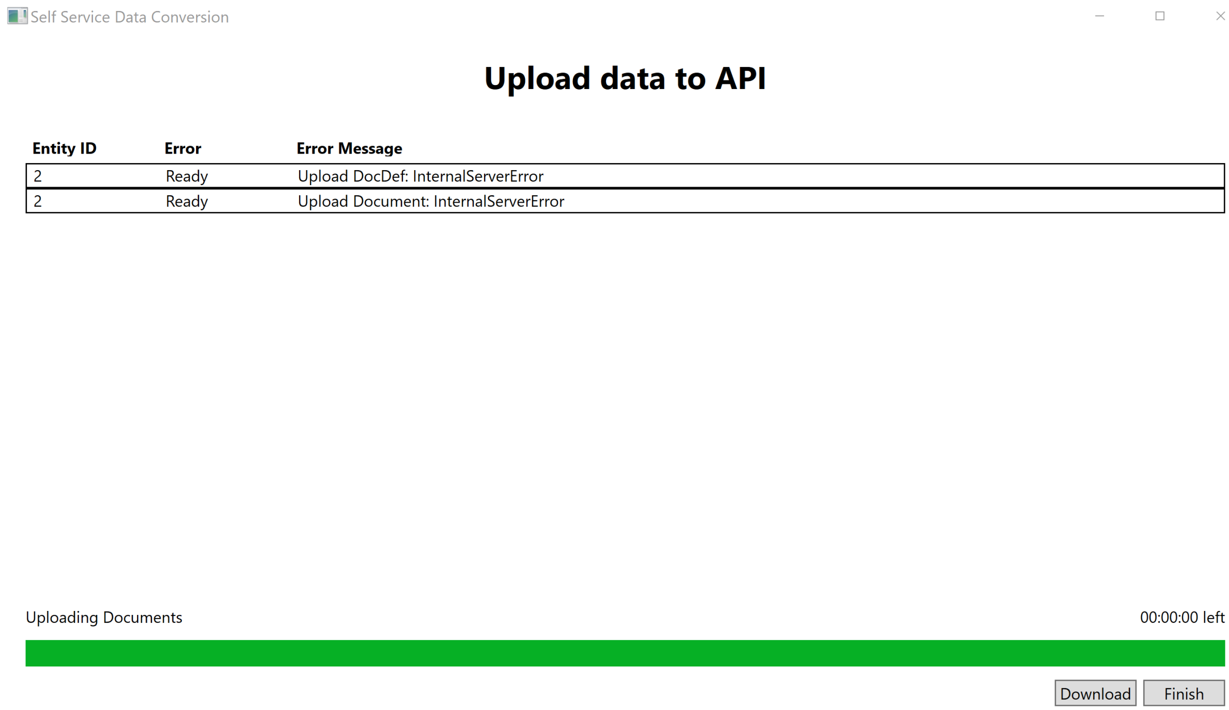


7. After you click **[Finish]**, a dialog shows to ask if you want to delete the SQLite database used to upload data to eProsecutor Online.

   Click **[Yes]** to delete the database or **[No]** to keep the database.

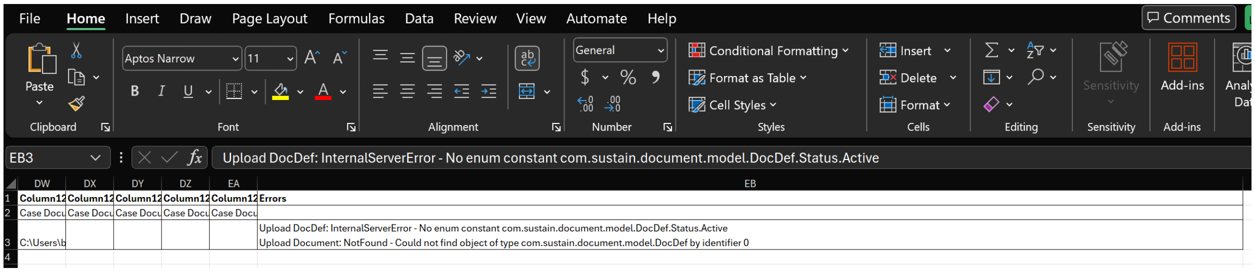
Failed Excel uploads

Uploads that fail to save in eProsecutor Online can be downloaded as an Excel spreadsheet after the upload tool has finished processing the data. To download the failed uploads, click **[Download]** on the upload screen.



The Excel spreadsheet has your original data row with two more columns:

- `xls_row`: indicates there row for the data in the original Excel sheet.
- `Errors`: has all error messages for that row.



The error messages are raw errors returned from the eProsecutor Online API. These errors can be fixed on the Excel spreadsheet and uploaded again to eProsecutor Online through the upload tool using a new conversion.

The failed uploads spreadsheet can be regenerated anytime if the underlying database still exists, by continuing a completed conversion.

5. Video library

This section includes eProsecutor Online training videos covering a wide range of topics. Each video is designed to help you learn more about eProsecutor Online and how to use it effectively.

In this section

User	Financials	Administration
• Add-ins • Add a case • Case data • Case involvement • Discovery • Documents • Navigating cases • Notes • Print setup • Sealing • Search • Sharebook • Tasks • Working with charges	• Add restitution • Check writing restitution • Disbursing payments • Take restitution payments	• Agency calendar • Agency news feed • Case special status • Customize lookup lists • Digital signatures • Document definitions • Investigations • JDA administration • Justice personnel • Organizations • Password reset • Set up fo SSRS check writing • Statutes • User setup

User

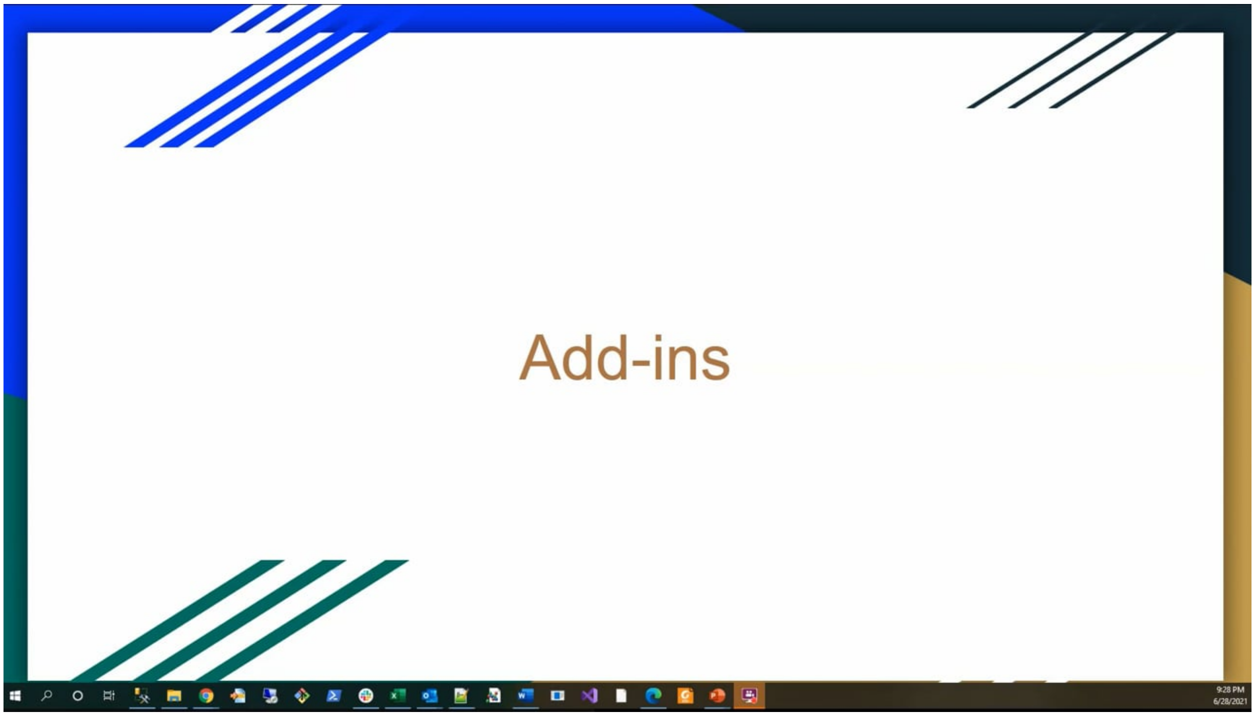
This section includes eProsecutor Online training videos covering user topics.

In this section

- Add-ins
- Add a case
- Case data

- Case involvement
- Discovery
- Documents
- Navigating cases
- Notes
- Print setup
- Sealing
- Search
- Sharebook
- Tasks
- Working with charges

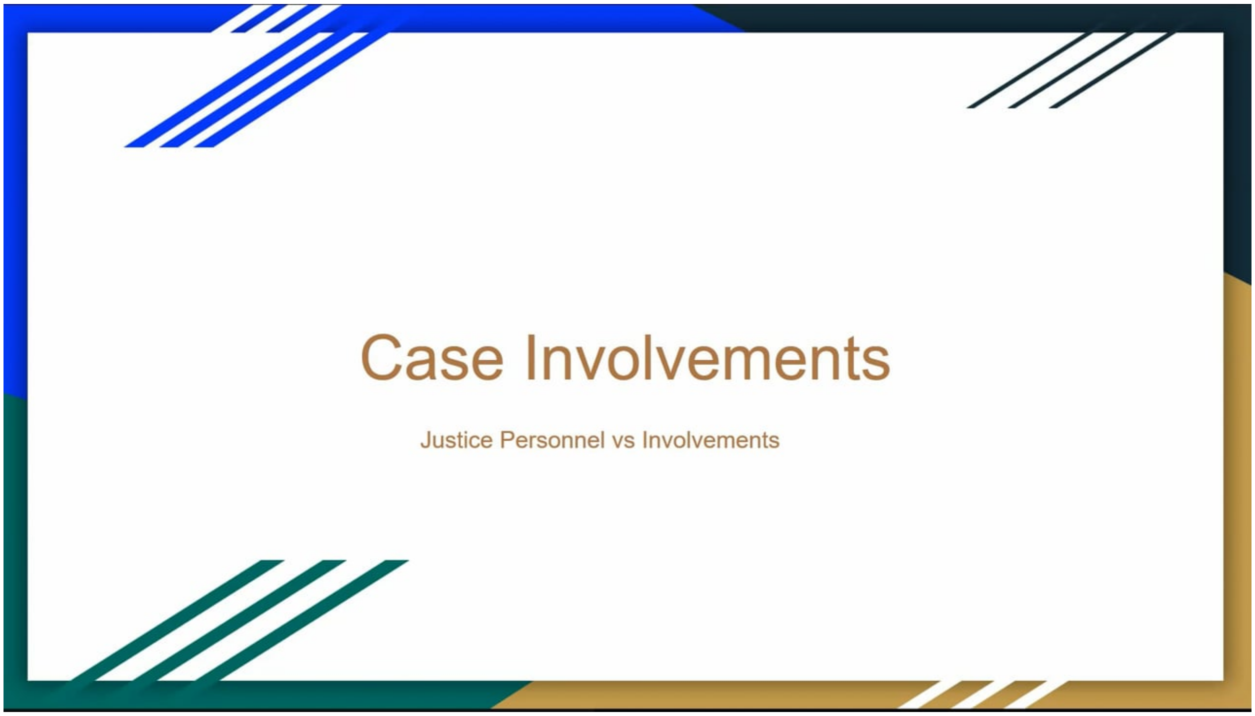
Add-ins



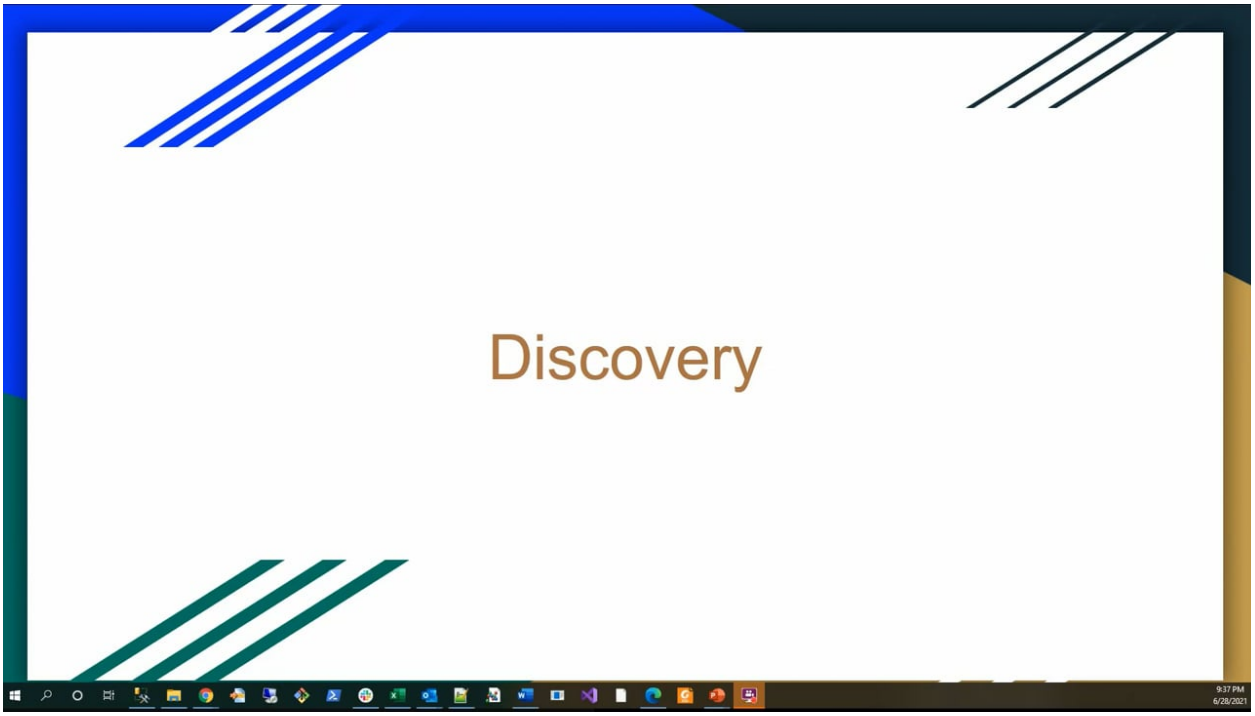
Add a case

Case data

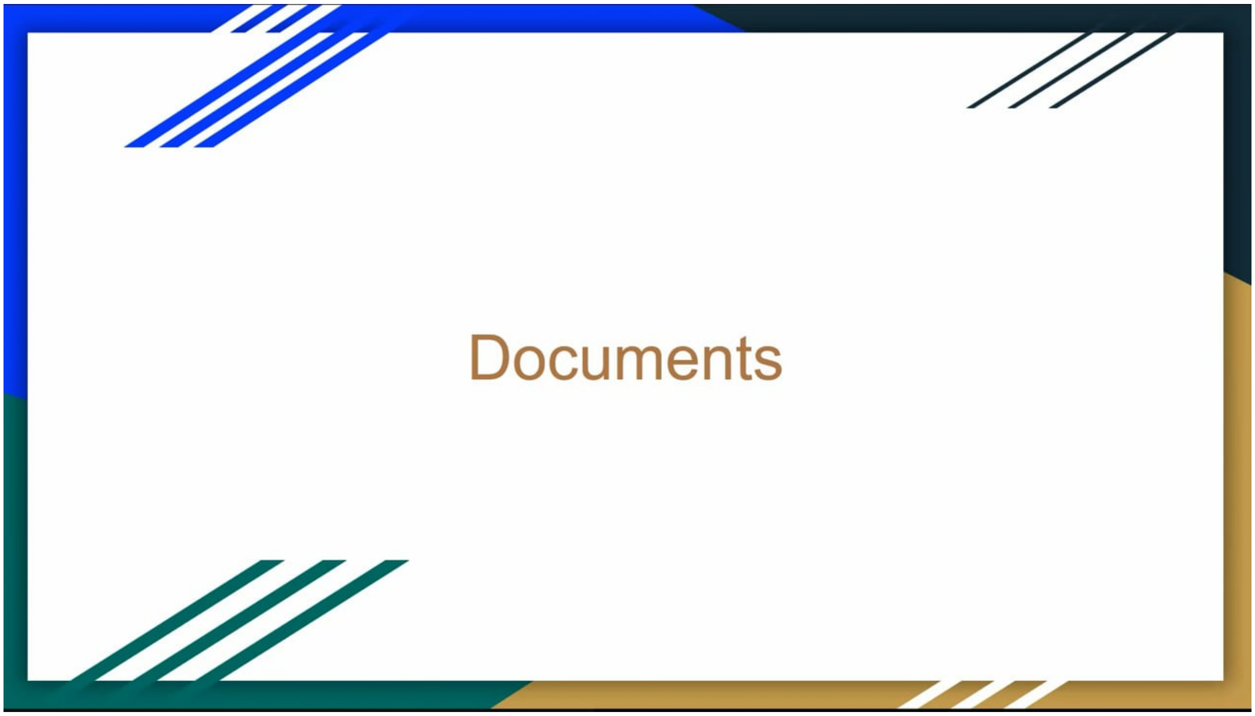
Case involvement



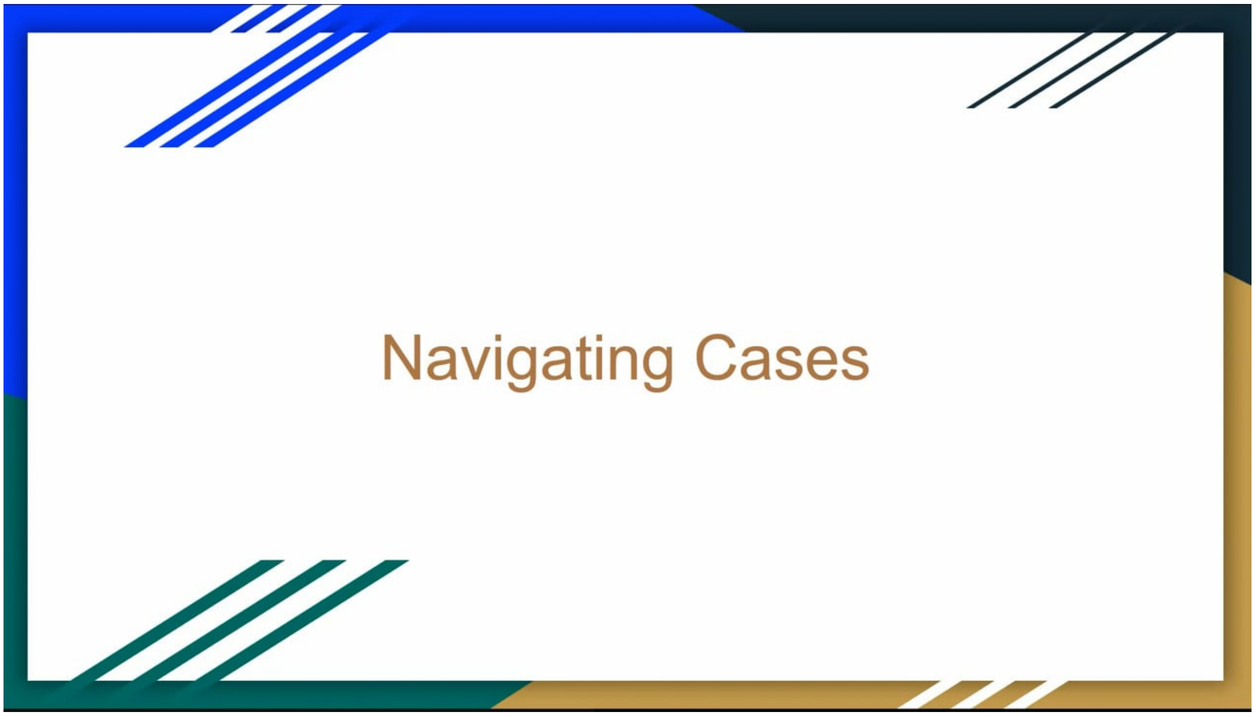
Discovery



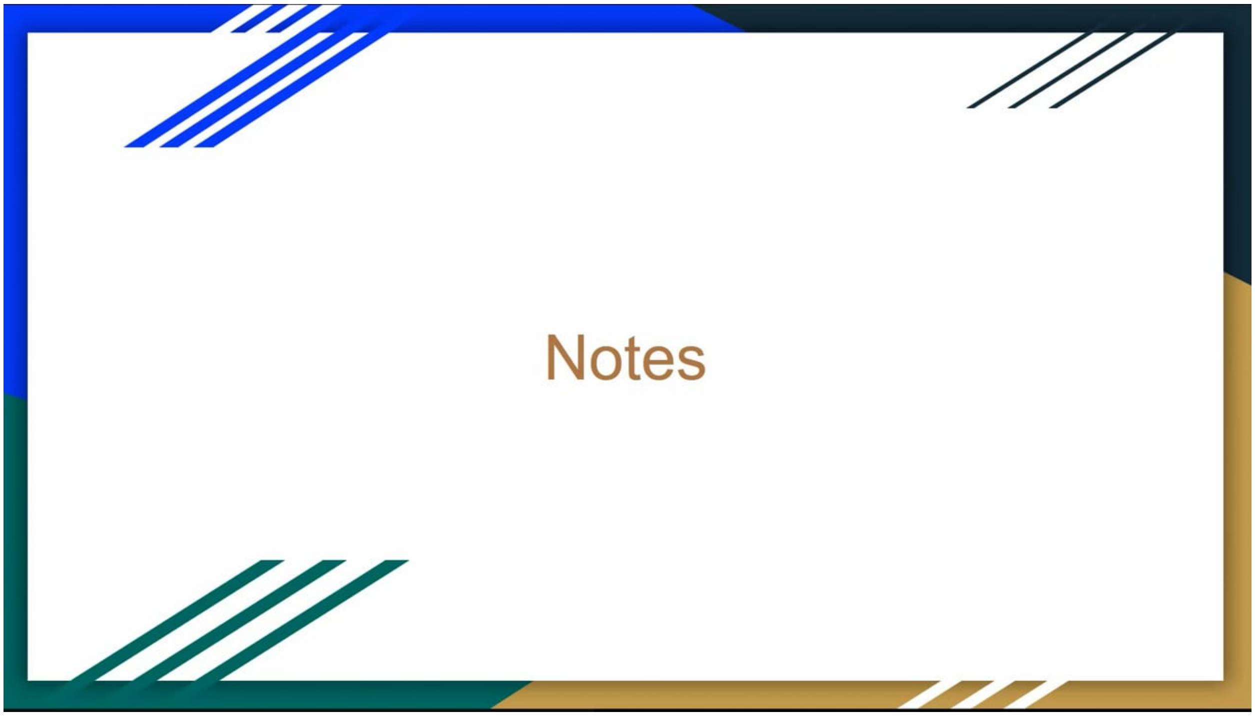
Documents



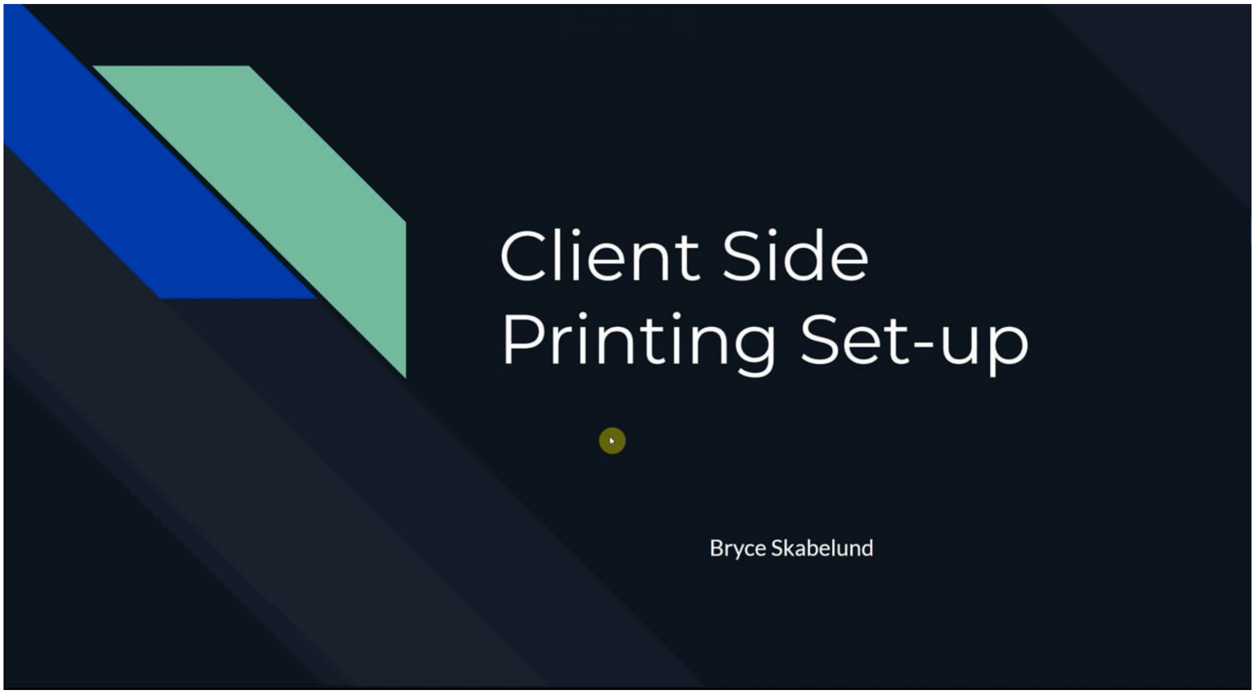
Navigating cases



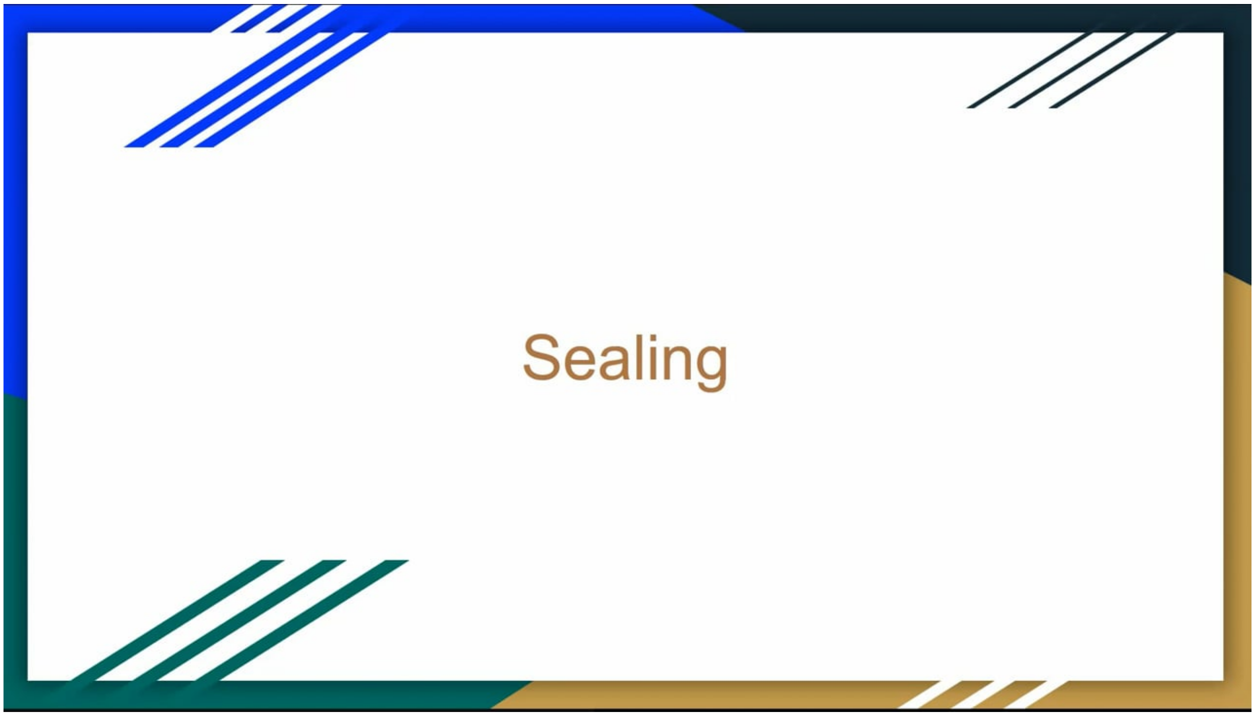
Notes



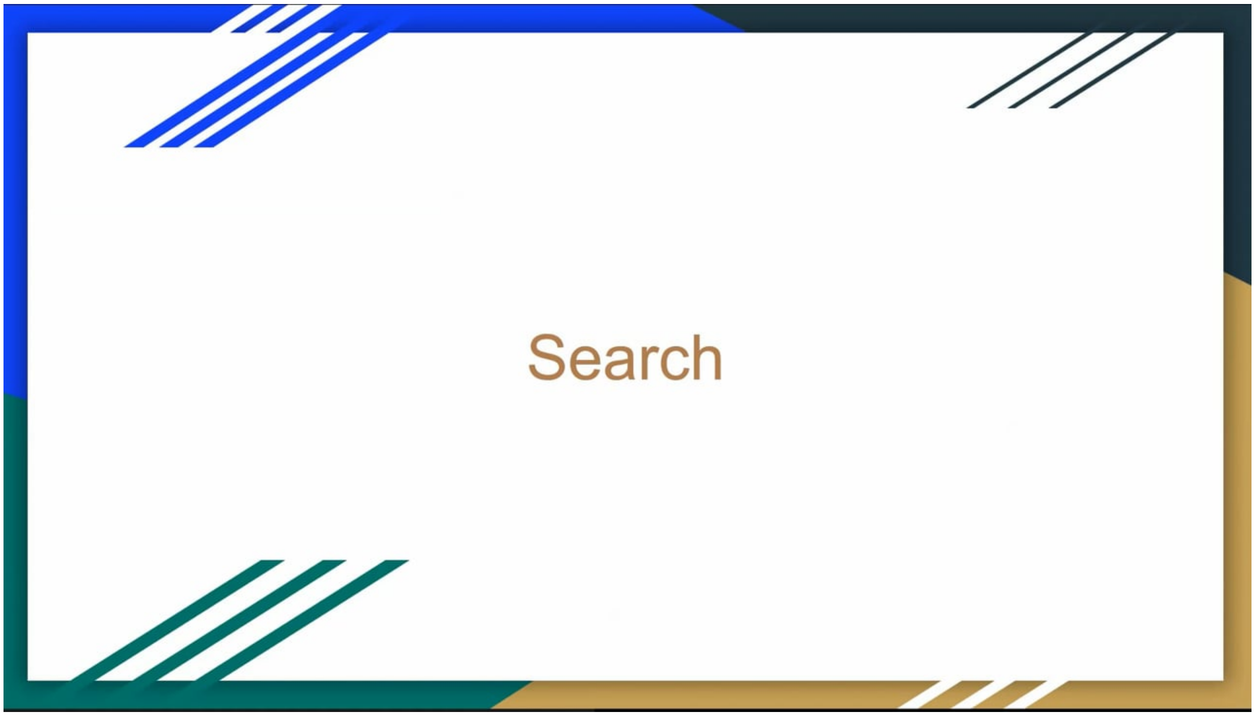
Print setup



Sealing

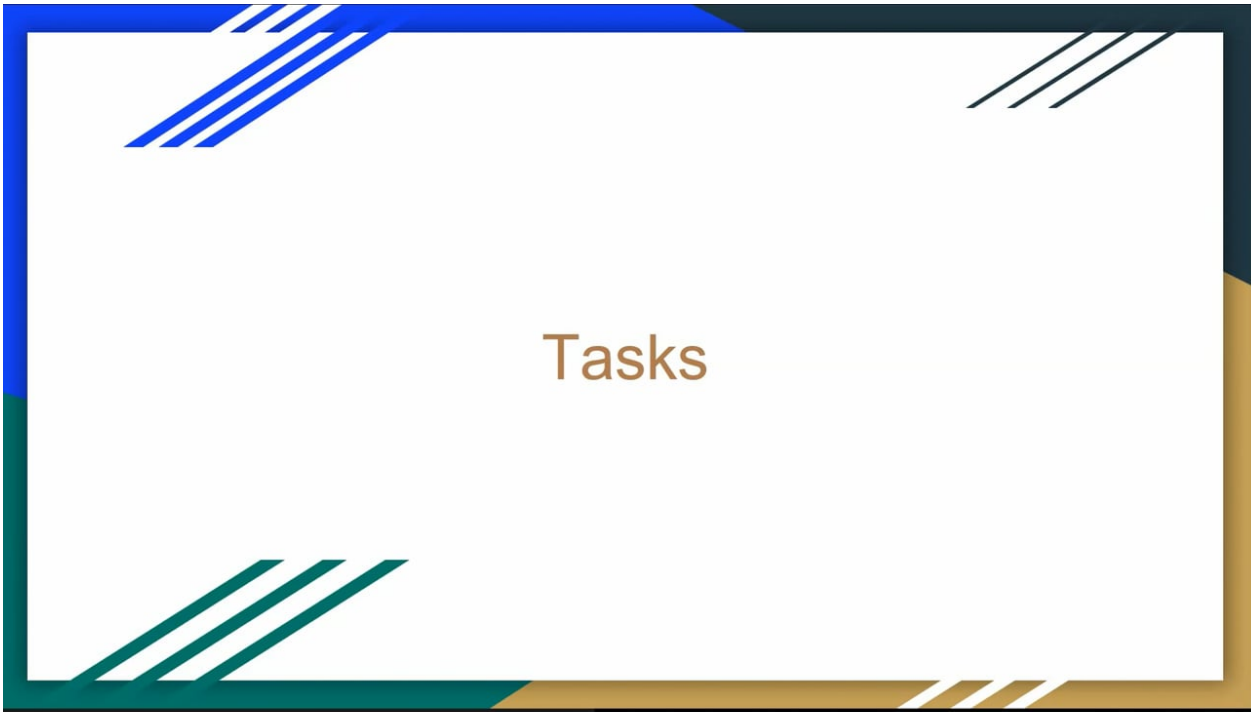


Search

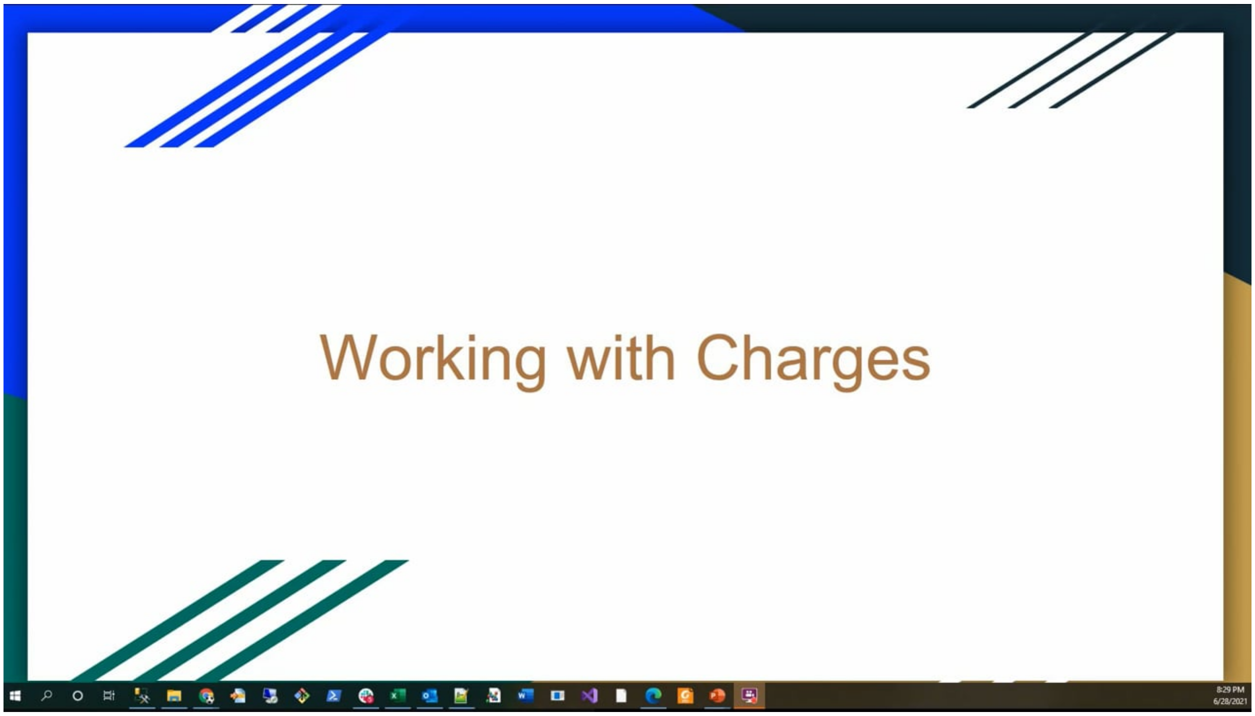


Sharebook

Tasks



Working with charges



Financials

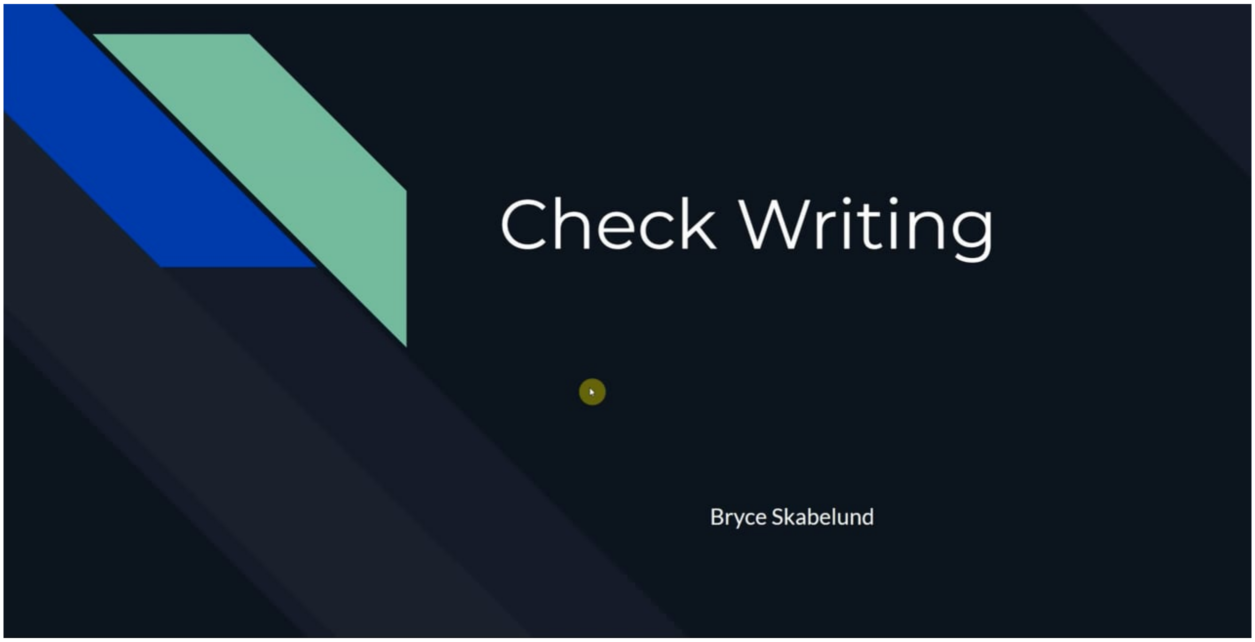
This section includes eProsecutor Online training videos covering financials topics.

In this section

- Add restitution
- Check writing restitution
- Disbursing payments
- Take restitution payments

Add restitution

Check writing restitution



Disbursing payments

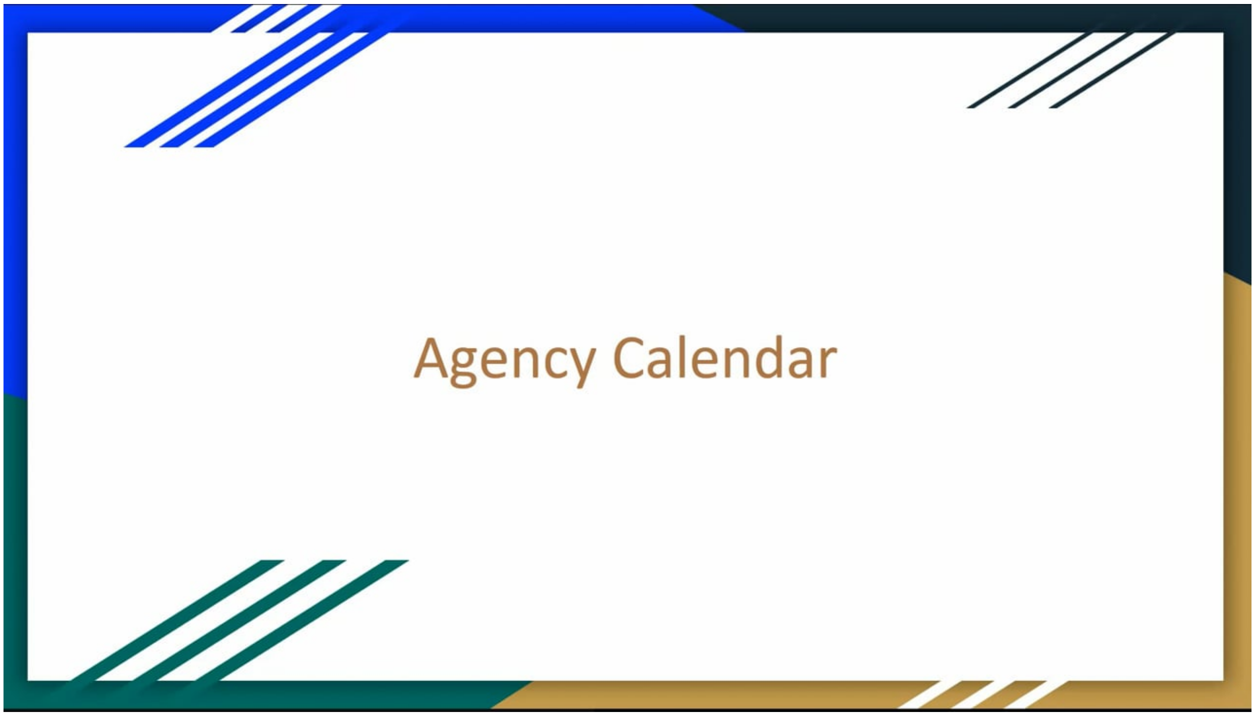
Take restitution payments

Administration

This section includes eProsecutor Online training videos covering administration topics.

In this section

Agency calendar



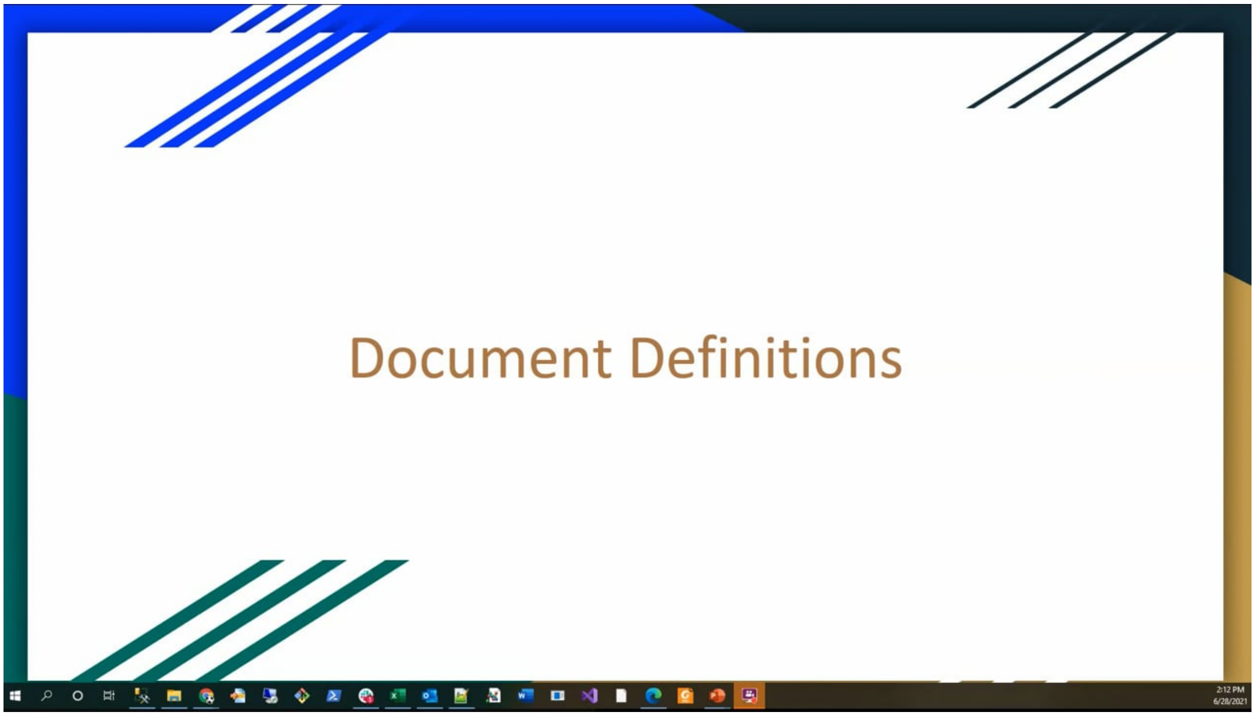
Agency news feed

Case special status

Customize lookup lists

Digital signatures

Document definitions



Investigations

JDA administration

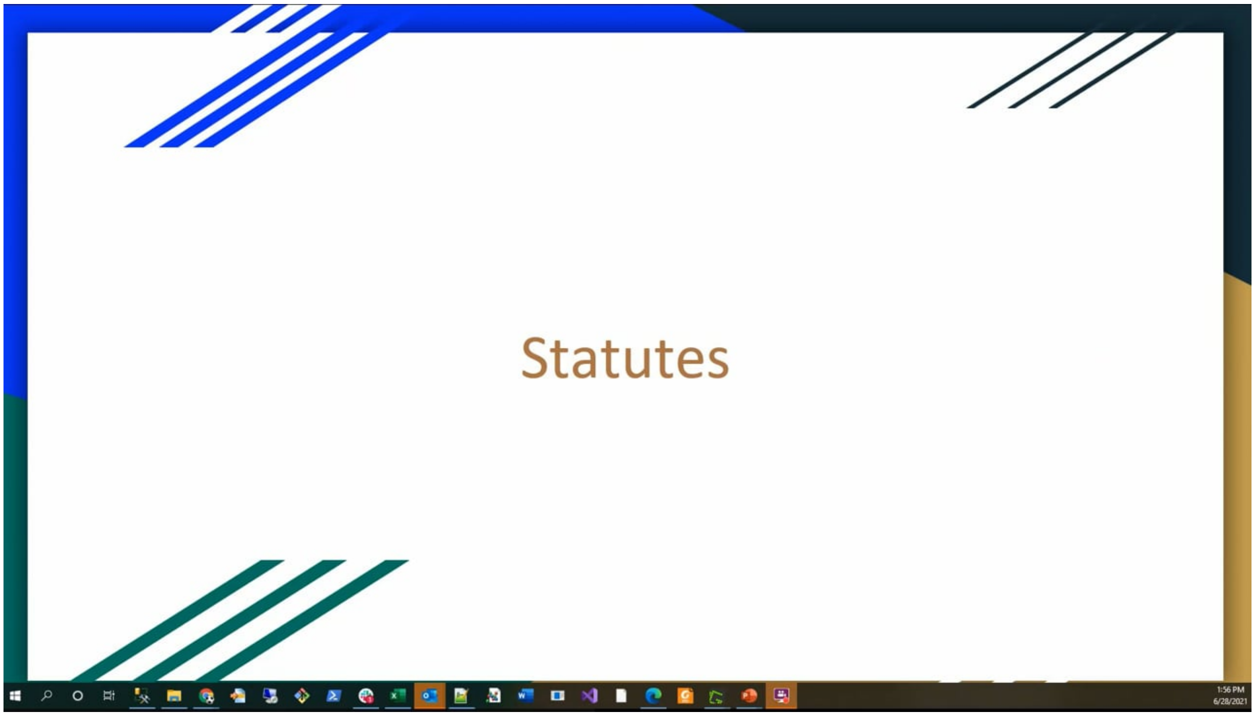
Justice personnel

Organizations

Password reset

Set up fo SSRS check writing

Statutes



User setup