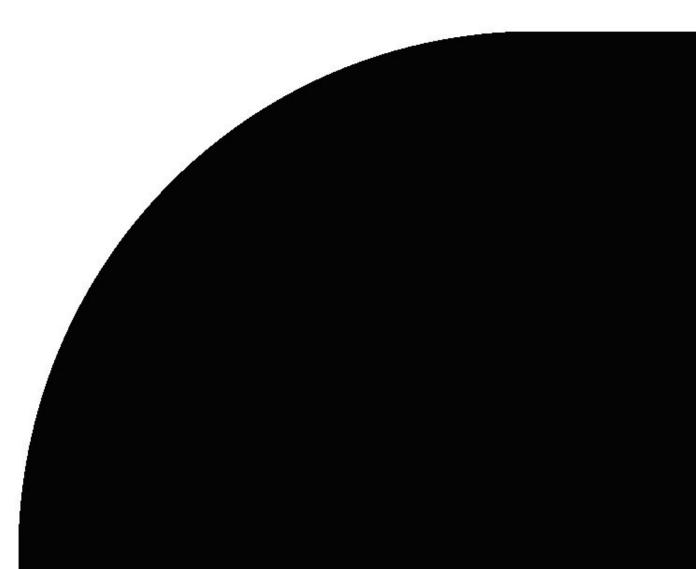




# DXC Justice Case Management

User Guide: Microsoft Dynamics 365 for Customer Engagement

August 2018



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# **1** Introduction

This user guide is designed to provide end users with an overview of how to setup and use the DXC Justice Case Management solution add-on. It provides walkthrough scenarios to establish a typical use case for a customer while also covering the setup.

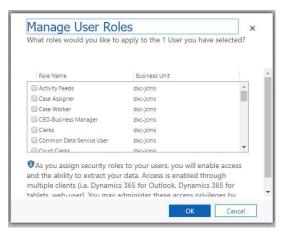


# 2 Adding Security Roles to Users

Before any setup or configuration occurs, the extension must be enabled by configuring the Security Roles to be active and assigned to users.

To access the Security Setup, go to Settings > Security > Users and select a user (or multiple users) to assign roles to and click on the Manage Roles icon.

🗰 Dy	namic	s 365 🗸	Settings 🗸	Security			
1 You nee	d to assign	security roles to I	new users Click to see a	a list of users who need l	Microsoft Dynamics 365	urity Roles.	Assign Roles
+ NEW	🖊 EDIT	R APPROVE E	MAIL 🖏 REJECT EM	IAIL 🚔 PROMOTE 1	ro admin 🏼 🎐 mana	AGE ROLES	CHANGE BUSINESS U

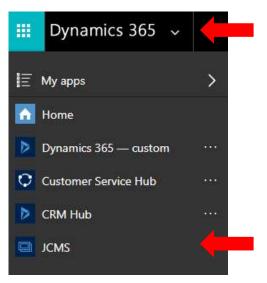


Adding security roles to users will give access to each feature and their respective functionality. Access should be modified by the DXC Justice Case Management Admin for the individual roles. No special privileges included.



# **3 Navigating to the App**

To navigate to the DXC Justice Case Management app, click on the Dynamics 365 logo in the upper left of the screen, then click the down arrow and select "JCMS".





## 4 Case Walk-Through Scenario

The case form has been pre-configured to include common data elements and case action types for cases as well as a starting point workflow. The data elements included on the case form along with the actions and workflows can be easily modified through configuration to make the system work the way your agency does. This scenario will walk you through setting up a new case record, add participants, and work with case actions. The final step will review the case dashboard.

To get started, open the Cases area in DXC Justice Case Management.

ement

#### 4.1 Creating New Case

- 1. Enter Docket Details
  - a. If you like a different Case Title than Participant v. Respondent (this is the default), begin by entering the Case Title.
  - b. Enter the remaining information. Please note that Division, Case Type, Primary Participant, and Primary Respondent are required.
  - c. Click Save.
- 2. Enter Arrest Details, if applicable.
- 3. Add additional Case Participants, if applicable.
  - a. Enter Additional Participants by clicking on the + button.

case: court case State of Califo	• ornia vs. Poppin' Pop	corn Store 📲							Filed Date 5/17/2018		5/30/21	se Action Dal 318		isposition rocessing	
DOCKET DETAILS				EVENTS											
Case Title*	State of California vs. Pop	pin' Popcorn Store		ALL COMPLAINT FILM	SS HEARINGS T	RIALS ORDERS DI	SPOSITIONS SEP	TENCES FINI	is						
Case Number	■ CAS-01033-B0X9K5														+
Division*	Criminal	Case Type*	Misdemeanor P	Attachment Action		Date Created $\Psi$		Action Statu		•	Actual End	File Attac			
Filed Date	5/17/2018			Cour	: Hearing	5/17/2018 2:46 P	Micheile Bo	Open	0			No	No		
					arance Filed	5/17/2018 2:45 P			0			No	Yes		
Judge	4 Michele Boughan	Court Clerk	Anton Fernando	Attached Com	plaint Fied	5/17/2018 2:43 P.	Michelle Bo	Completed	1	6/1/2018	5/30/2018 1:	Yes	Yes		
Courtroom				PARTICIPANTS											
Description	12			ALL PARTY NON-PART	r i i i i i i i i i i i i i i i i i i i										
ARREST DETAILS															+
Prosecutor				Participant 🛧	Role	Attorney		Primary	Warrant	Minor	Special Needs				
Date of Arrest				Michelle Boughan	Judge			No	No	No	No				
Arresting Agency		Officer		Poppin' Popcorn Store State of California	Responde			Yes	No	No	No				
Band Type				State of California	Detendant			Tes	NO	NO	NO				
Bond Set Amount	223	Bond Hearing Date													
Warrant Status	-	Warrant issued On	-	CHARGES											
															+
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Balance	B \$250.00	Sent to Collection	8	EVIDENCE/EXHIBIT											



#### 4.2 Adding Events / Case Actions

- 1. Enter new Events called Case Actions.
  - a. Enter case actions by clicking on the + button.

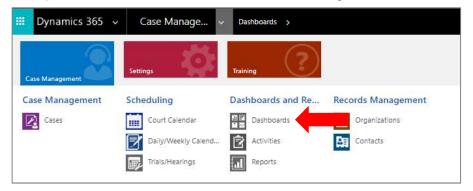
ALL COMPLAIN	T FILINGS HEARINGS	TRIALS ORDERS DISP	DSITIONS SENT	ENCES FINES					
ttachment	Action Type	Date Created ↓	Assigned to	Action Status	Due Date	ſ	Actual End	File Attac	Required
	Court Hearing	5/17/2018 2:46 P	Michelle Bo	Open	0			No	No
	Appearance Filed	5/17/2018 2:45 P	Michelle Bo	Open	0			No	Yes
Attached	Complaint Filed	5/17/2018 2:43 P	Michelle Bo	Completed	<b>√</b> 6,	/1/2018:	5/30/2018 1:	Yes	Yes

- 2. Fill in the New Case Action form.
  - a. Add the Action Type, Action Date, and Participants.
  - b. Add any additional Documents if applicable.
  - c. Fill in the Court Date/Room/Staff and Financials if applicable.

tase action : case actions ▼ New Case Action +=		Actual Duration Due Date	Action Status* Open	Continue To*
DETAIL	DOCUMENTS			
kclon Type <sup>4</sup> kclon Dale <sup>4</sup> 7/30/2016 9:11 AM farticipants leganding <sup>4</sup> P State of California vs. Roppin' Roppon Store		NOTES		
Description	Required 🔒 No	Attachment	File Attached No	
tearing Schedued Start Courtroom Ssigned to * & Michele Boughan Middlional Resources				
FINANCIALS Fee: Fine Fee Status				
Amount Paid Payment Received No				

#### 4.3 Viewing Case Dashboard

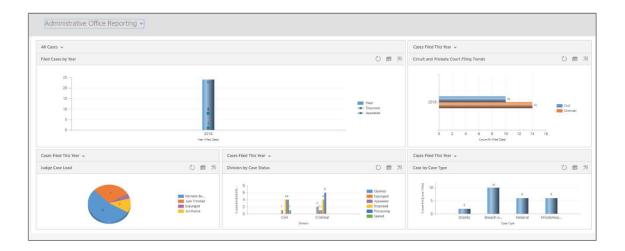
1. Open Dashboards area in DXC Justice Case Management.





2. Open appropriate dashboard from the available list.

	System Dashboards	
	Administrative Office Reporting	
	Case Actions/Activities	
	Court Clerk Dashboard	
	Court Supervisor Dashboard	
	Courtroom Management	
==	Supervisor Dashboard	





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# **5** Scheduler Scenario

The Scheduler will work on a saved Case Action record where the Case Action Type has a category of Trial or Hearing. The Case Action must be assigned to a Case with an automatically assigned calendar. A filter will check the Recurring Appointment records and match the Case Action and Case information with the Category, Assigned Judge, Calendar, Courtroom, and Maximus Cases to display available date options.

### 5.1 Creating an Appointment

- 1. Begin by selecting to add a new Event or new Case Action.
- 2. Choose a Case Action that is a Hearing or Trial.
- 3. Fill in the required fields.
  - a. The date will automatically populate with today's date, but this can be modified with the appropriate date.
  - b. The Participant is generally the Primary Plaintiff.
- 4. Save the Case Action form.
- 5. Select the Days Out from 5, 10, 30, 60, or 90 days.



# 6 Court Calendar

The Court Calendar is a feature that allows staff to see that Court Calendars for the month, week, or day. These Calendars can filter for different Court Calendars or Case Action types. They have a "save" feature which allows them to be printed.

#### 6.1 Accessing the Calendar

1. To access the Calendar, click Court Calendar under Scheduling.

Case Management	Settings	Training	
Case Management	Scheduling	Dashboards and Re	Records Management
Cases	Court Calendar	Dashboards	Organizations
	Daily/Weekly Calend	Activities	Contacts
	Trials/Hearings	Reports	

- 2. This page will open the Monthly Calendar.
  - a. You can filter for Action Type (Hearing, Trials, Appearances).
  - b. You can also filter for different Court Calendars.

Dynamics 365		✓ Court Calendar	SAI	NDBOX	, ⊘ + ∀ ⊘ ?
August 20	18				Save Calendar
onday	Tuesday	Wednesday	Thursday	Friday	August 2018
	locody	1	2	3	Su Mo Tu We Th Fr Sa
					1         2         3         4           5         6         7         8         9         10         11
					12 13 14 15 16 17 18
	7	8	9	10	19 20 21 22 23 24 25
					26 27 28 29 30 31
					Calendar View
	14	15	16	17	Month Week Day
					Court Calendar
	21	22	23	24	
					✓ Red - 2
					Blue - 2
	28	29	30	31	Action Tyme
					Action Type
					Appearance
				1	✓ Hearings
		1			✓ Trials

3. If you select Week you will be able to Weekly Calendar and if you select Day you will be able to view the Calendar for today.



August 2019	Save Calendar
August 2018	August 2018
Monday, August 6, 2018	Su Mo Tu We Th Fr Sa
No Events	1 2 3 4
Tuesday, August 7, 2018	5 6 7 8 9 10 11
No Events	12 13 14 15 16 17 18
Nednesday, August 8, 2018	19 20 21 22 23 24 25
No Events	26 27 28 29 30 31
Thursday, August 9, 2018 • No Events Friday, August 10, 2018	Calendar View Month Week Day
No Events	Court Calendar
	🗹 Red - 1
	⊮ Red - 2
	🗷 Blue - 2
	Action Type
	✓ Appearance
	🗹 Hearings
	✓ Trials

August 2019	Save Calendar			
August 2018	Augu	ust 201	8	
6	Su Mo Tu	We T	'h Fr	Sa
		1	2 3	4
	5 6 7		9 10	
	12 13 14			
	19 20 21			
	26 27 28	29	30 31	¢
	Calendar V Month Court Cale	Week		Day
	✓ Red - 2			
	In Blue - 2			
	Action Type	Э		
	Appearance			
	🗷 Hearings			
	🖉 Triais			

4. When you select the Save Calendar button, the Calendar will be saved in a printable format (JPEG image).

💿 Save As				×
← → · · ↑ 🕨 > OneDrive > Desktop	~ ひ	Search Deskt	op	Q
Organize • New folder			•	?
Quick access Desktop Documents Decuments Decu	∧ No items match y		e modified	Ţ
Colentrive  File name: Calendar.jpg Save as type: JPEG Image				~
▲ Hide Folders		Save	Cance	el





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