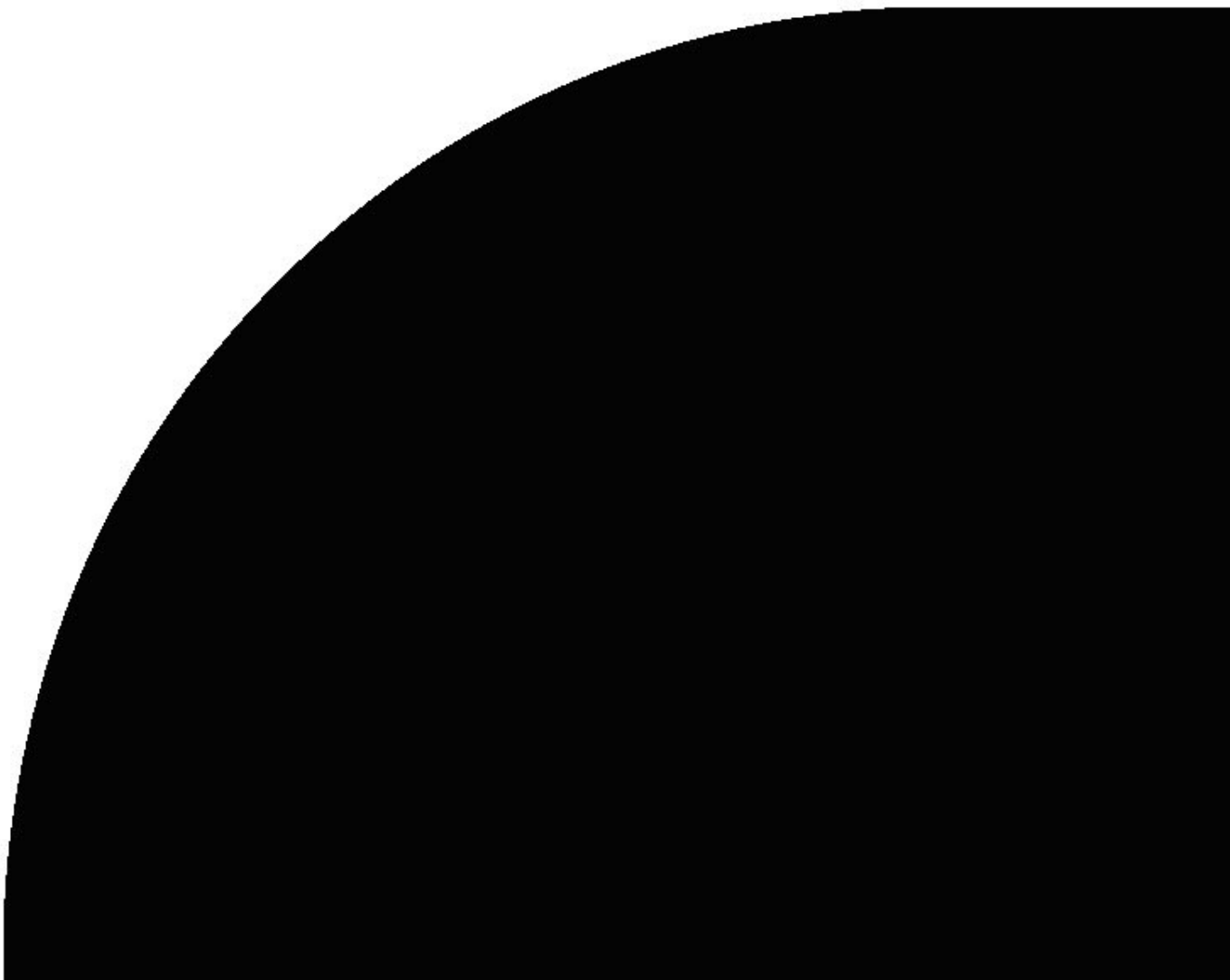


# DXC Justice Case Management

**User Guide:  
Microsoft Dynamics 365 for Customer Engagement**

August 2018



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# 1 Introduction

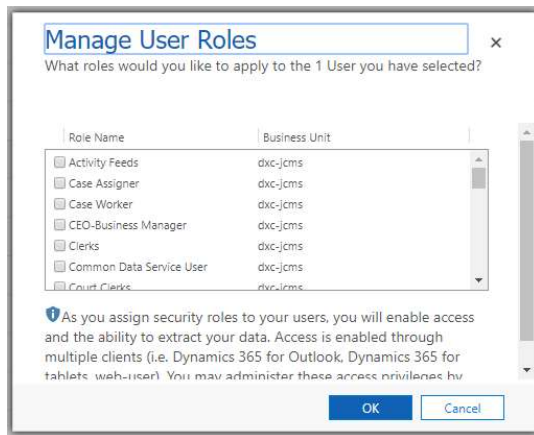
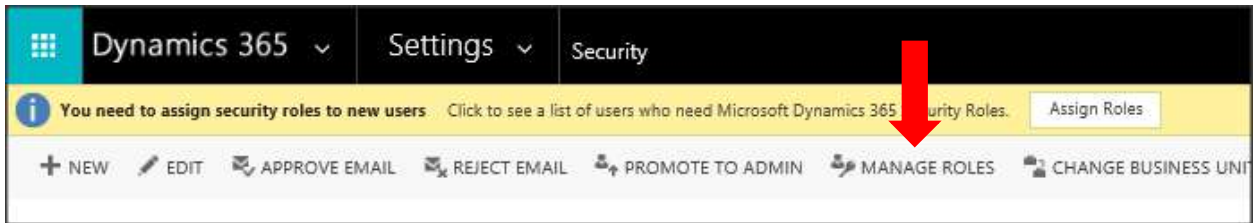
This user guide is designed to provide end users with an overview of how to setup and use the DXC Justice Case Management solution add-on. It provides walkthrough scenarios to establish a typical use case for a customer while also covering the setup.



## 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.

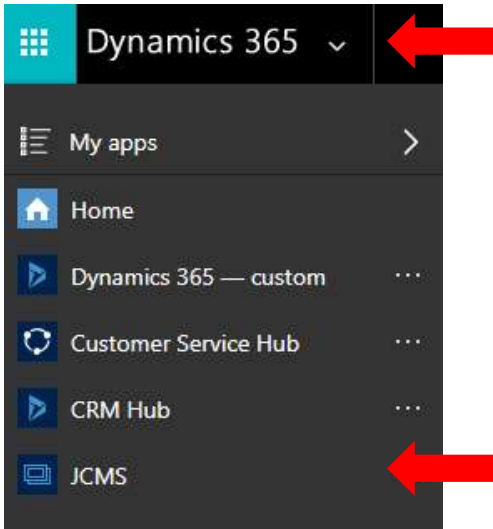


Adding security roles to users will give access to each feature and their respective functionality. Access should be modified by the DXC Justice Case Management Admin for the individual roles. No special privileges included.



### 3 Navigating to the App

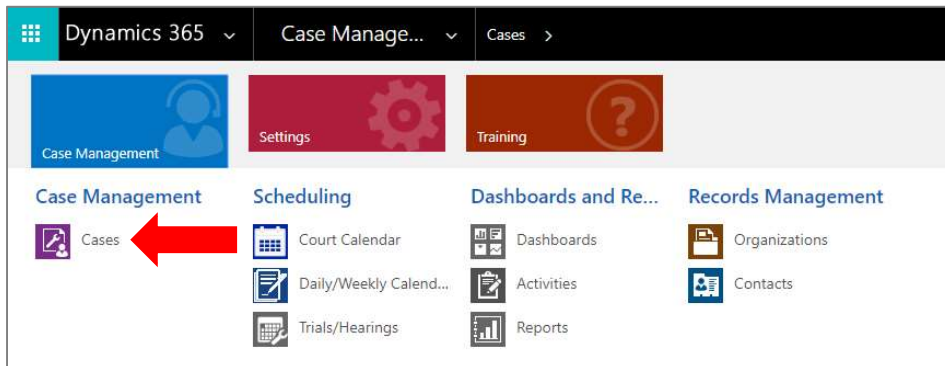
To navigate to the DXC Justice Case Management app, click on the Dynamics 365 logo in the upper left of the screen, then click the down arrow and select “JCMS”.



## 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.



### 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.

The screenshot shows the Dynamics 365 Case Management form for 'State of California vs. Poppin' Popcorn Store'. The form is divided into several sections: 'DOCKET DETAILS', 'ARREST DETAILS', 'CUMULATIVE FINANCIALS', 'EVENTS', 'PARTICIPANTS', 'CHARGES', and 'EVIDENCE/EXHIBIT'. The 'PARTICIPANTS' section is highlighted with a red arrow. The 'PARTICIPANTS' table shows the following data:






Participant	Role	Attorney	Primary	Warrant	Minor	Special Needs
Michelle Boughan	Judge		No	No	No	No
Poppin' Popcorn Store	Respondent		Yes	No	No	No
State of California	Defendant		Yes	No	No	No

The 'CHARGES' section shows a message: 'No Charges found for this Case. Select Add (+)'.



## 4.2 Adding Events / Case Actions

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

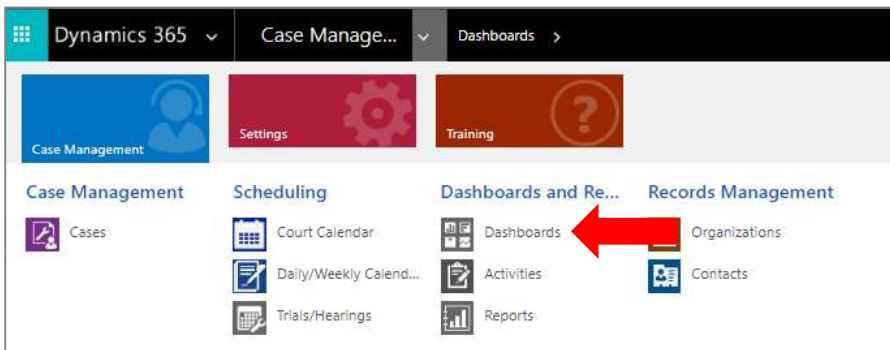
EVENTS									
ALL COMPLAINT FILINGS HEARINGS TRIALS ORDERS DISPOSITIONS SENTENCES FINES									
									
Attachment	Action Type	Date Created ↓	Assigned to	Action Status	Due Date	Actual End	File Attac...	Required	
	Court Hearing	5/17/2018 2:46 P...	Michelle Bo...	Open			No	No	
	Appearance Filed	5/17/2018 2:45 P...	Michelle Bo...	Open			No	Yes	
 Attached	Complaint Filed	5/17/2018 2:43 P...	Michelle Bo...	Completed		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.

CASE ACTION : CASE ACTIONS *				Actual Duration	Due Date	Action Status *	Continue To *
New Case Action				...	...	Open	State of California
<b>DETAIL</b>		<b>DOCUMENTS</b>					
Action Type *	...	NOTES					
Action Date *	7/30/2018 9:11 AM						
Participants	...						
Regarding *	State of California vs. Poppi's Popcorn Store						
Description	...						
<b>COURT DATE/ROOM/STAFF</b>							
Hearing Scheduled Start	...						
Courtroom	...						
Assigned to *	Michelle Boughan						
Additional Resources	...						
<b>FINANCIALS</b>							
Fee	...	Fine	...				
Fee Status	...						
Amount Paid	...	Payment Received	No				

## 4.3 Viewing Case Dashboard

1. Open Dashboards area in DXC Justice Case Management.



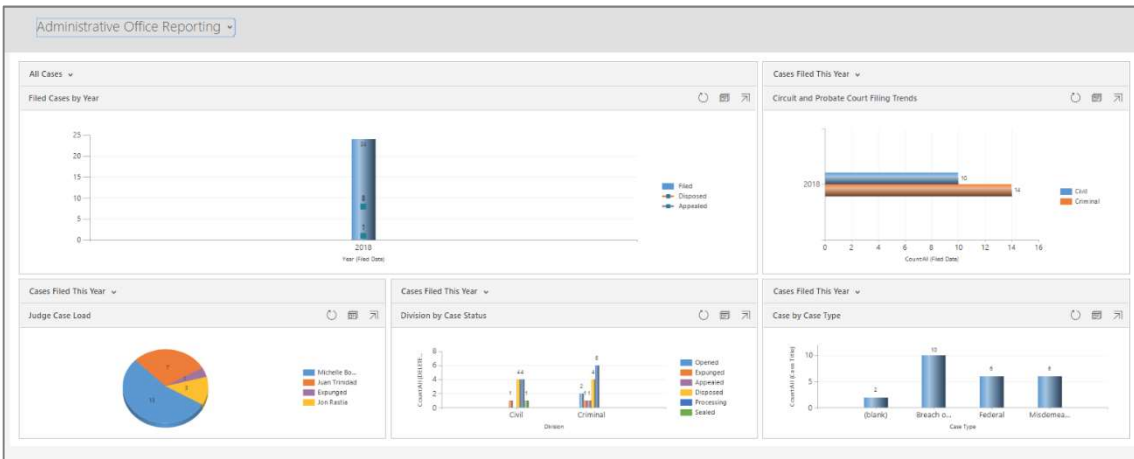
The screenshot shows the Dynamics 365 Case Management interface. At the top, there are navigation tabs for 'Dynamics 365', 'Case Manage...', and 'Dashboards'. Below this, there are several tiles for different areas: 'Case Management', 'Settings', 'Training', 'Case Management', 'Scheduling', 'Dashboards and Re...', and 'Records Management'. The 'Dashboards and Re...' tile is highlighted with a red arrow, indicating the target area for viewing the case dashboard.



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





## 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.

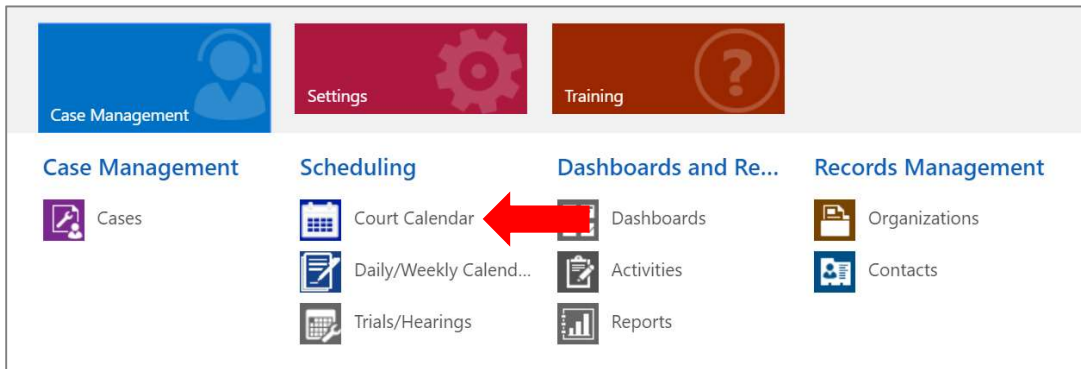


## 6 Court Calendar

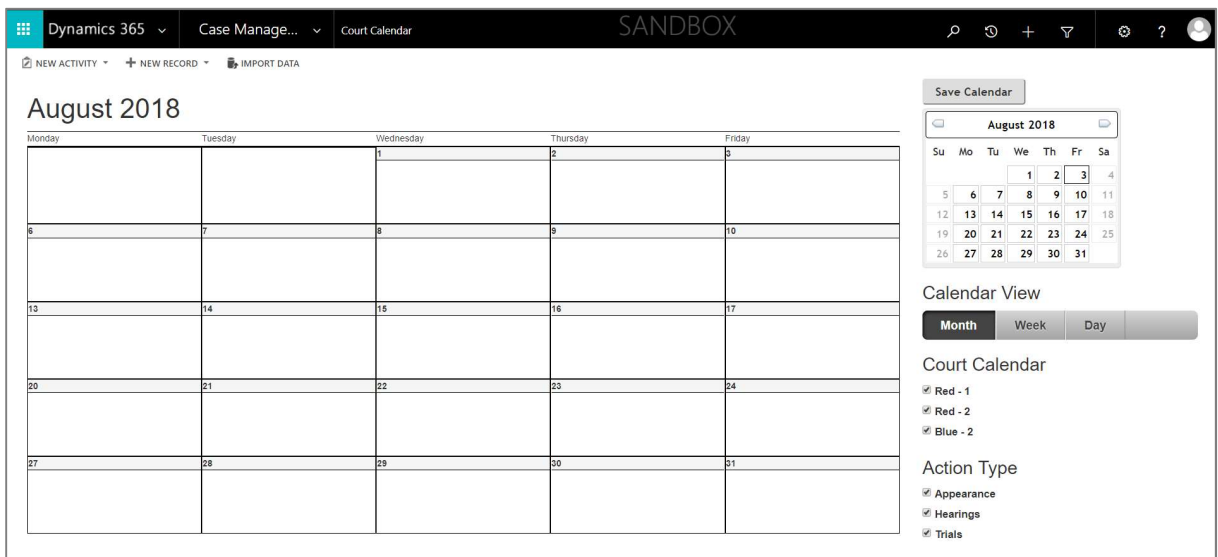
The Court Calendar is a feature that allows staff to see that Court Calendars for the month, week, or day. These Calendars can filter for different Court Calendars or Case Action types. They have a “save” feature which allows them to be printed.

### 6.1 Accessing the Calendar

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

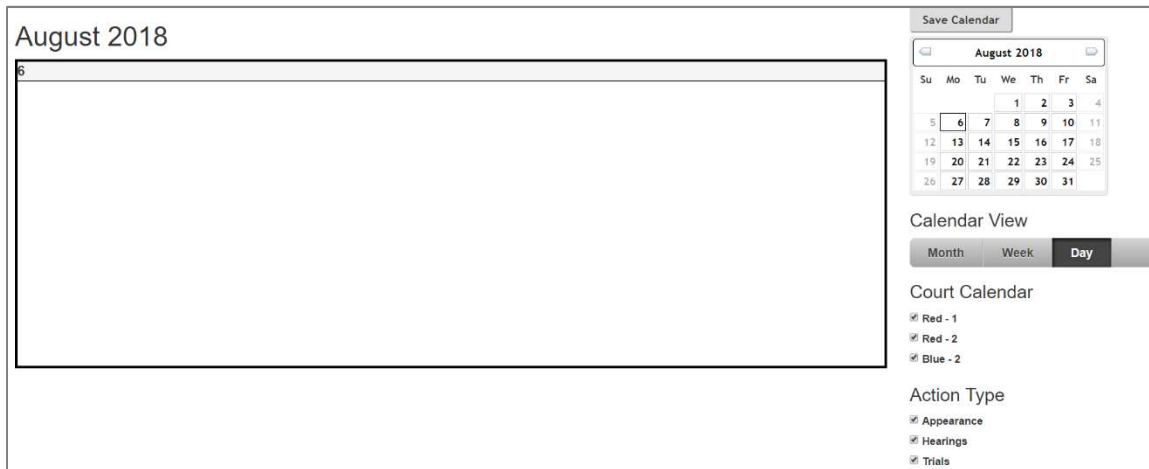
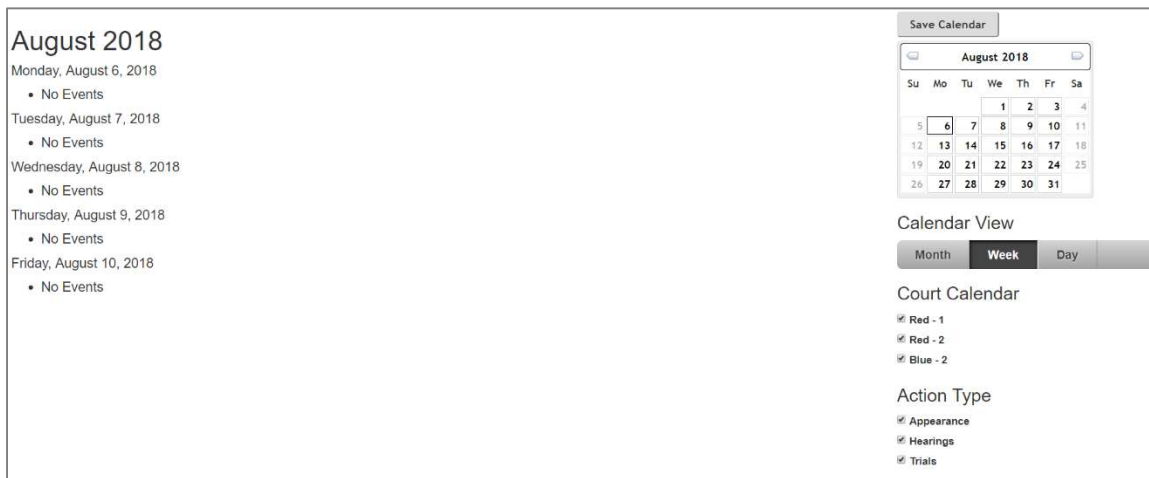


2. This page will open the Monthly Calendar.
  - a. You can filter for Action Type (Hearing, Trials, Appearances).
  - b. You can also filter for different Court Calendars.

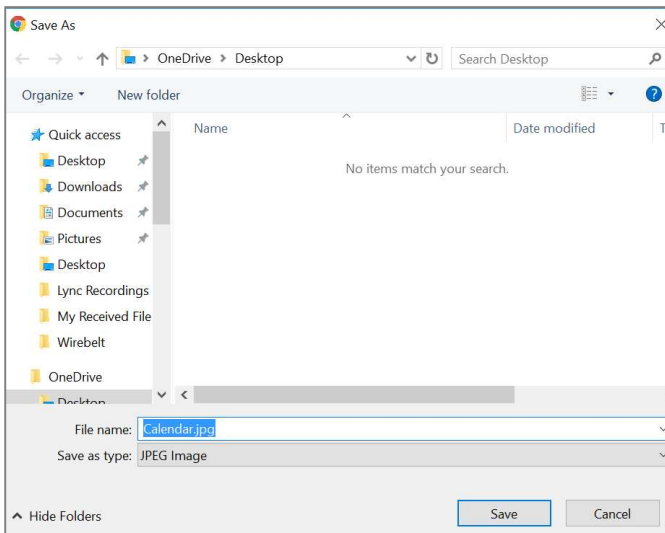


3. If you select Week you will be able to Weekly Calendar and if you select Day you will be able to view the Calendar for today.





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



#### **About DXC Technology**

DXC Technology (DXC: NYSE) is the world's leading independent, end-to-end IT services company, helping clients harness the power of innovation to thrive on change. Created by the merger of CSC and the Enterprise Services business of Hewlett Packard Enterprise, DXC Technology serves nearly 6,000 private and public sector clients across 70 countries. The company's technology independence, global talent and extensive partner network combine to deliver powerful next-generation IT services and solutions. DXC Technology is recognized among the best corporate citizens globally. For more information, visit [www.dxc.technology](http://www.dxc.technology).