

CountySuite: Court of Common Pleas

How-to Guide




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CountySuite Court of Common Pleas Home Page


The Case Schedules screen is the home screen of the application. The user can always return to this screen by either selecting the “Case Schedule” link in the upper right on any screen, or by selecting the county’s Logo in the page header.

- The default schedule date is today’s date. Click on the date at the top of the screen to select another schedule date, or click on the buttons on the left and right of the screen to navigate to yesterday or tomorrow, respectively.
- Print the displayed schedule by clicking the  button at the top of the screen.
 - From the drop down menu, select “All” to print the entire schedule, “All – Lists Collapsed” to print the schedule with list events collapsed, or “Rooms Only” to print only the room assignments.
- To print the events for a particular room, click the  button on the room line. To print an individual event, click the  button on the event line.

- Change the schedule view by clicking the  button at the top of the screen.

From the drop down menu, select “All” to view the entire schedule with list events expanded, “All – Lists Collapsed” to view the schedule with list events collapsed, or “Rooms Only” to view only the room assignments.

How to Search for Case Events

From the Case Schedules screen, select the  button. The Search screen will now be displayed.



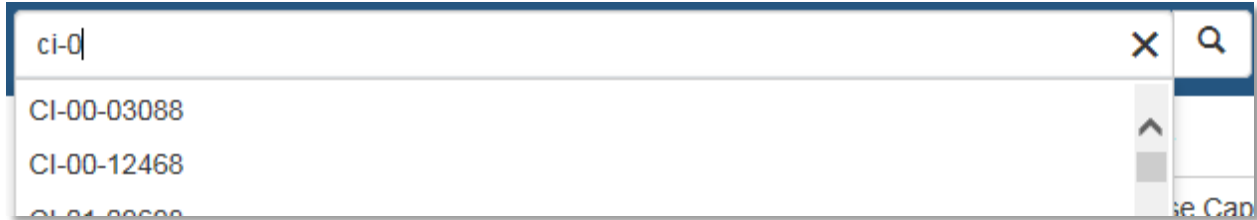
The screenshot shows the search interface for the Lancaster County, Pennsylvania Court of Common Pleas. The interface includes a search bar at the top right with a magnifying glass icon and the text 'Search'. Below the search bar, there are several search criteria fields: Result Type (1), Max Results (2), Start Date (3), End Date, Case Number (4), Location (5), Official (6), Case Attributes (7), Event (8), Participant Role (9), Participant Name (exact format: last or last, first) (10), and Notes (11). A search button (12) is located to the right of the search criteria. Below the search criteria, there is a section for Search Results (50 results out of 1472 returned. Please adjust your search criteria.) and a table (13) displaying the search results.

Type	Date	Time	Caption	Case	Event Type	Room	Official	Plaintiff Attorneys	Defendant Attorneys	Other
Case	2/1/2016	9 AM-5 PM	BAER, JENNIFER vs. BAER, STEPHEN R	CI-14-05991	Custody Hearing	Location To Be Announced - FJ5	Judge Thomas B Sponaule	Plaintiff Attorney HOLLY S FILIUS	Defendant Attorney CHRISTOPHER P LYDEN	
Case	2/2/2016	1 PM-5 PM	List Event	List Event	Protection Hearing List	Location To Be Announced	Judge Jeffrey J. Reich			

Step-by-step

1. Select the Result Type to be searched by: Case, Room Assignment, List, or All types. The available search options will change depending upon the Result Type selected.
2. Set the maximum number of search results to be displayed in the results grid. If there are more results than the maximum number, then a message will be displayed showing the total number of available results and a suggestion to narrow the search criteria.

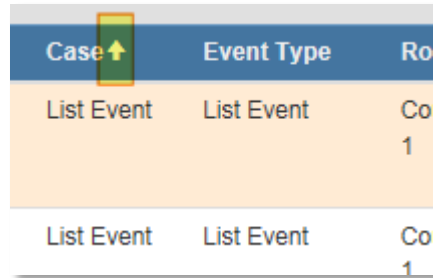
3. Set the Start and End dates as the range within which the search is to occur. Please note that if the Start Date box is left blank, the search will default to starting on today's date.
4. Enter all or part of the Case Number into the search box.
 - The type-ahead feature will return suggestions for Case Numbers as characters are entered:



- If available, the results for Civil cases are pulled from CountySuite: Civil Court, while the Criminal cases are based upon CPCMS.
5. Select the Location in which the event takes place.
 6. Select the Official presiding over the event.
 7. Select the Case Attribute(s) associate with the Case Event: Confidential, Telephonic, Video, Interpreter, Lancaster County Prison, State Prison, Other Prison
 8. Select the Event Type. The type-ahead feature will return suggestions as characters are entered.
 9. Select the Participant Role (ex. Plaintiff, Defendant Attorney, Probation Officer, etc.). This search option is used in conjunction with Participant Name.
 10. Enter the Participant's Name. Checking Exact will enable the exact name match functionality. With this selected, entering either the "Last Name" only, or "Last Name, First Name", will display results that match exactly to the text as entered. With Exact unchecked, the search results will be more broadly based upon partial matches to the entered text.
 11. Enter text into the Notes box to search within Case Event notes.
 12. Once the desired search criteria has been entered, select Search to perform the search, or Reset to remove the criteria. To print the search results, select Print.

13. The Search Results grid will display a list of Case Schedule Events based upon the entered criteria.

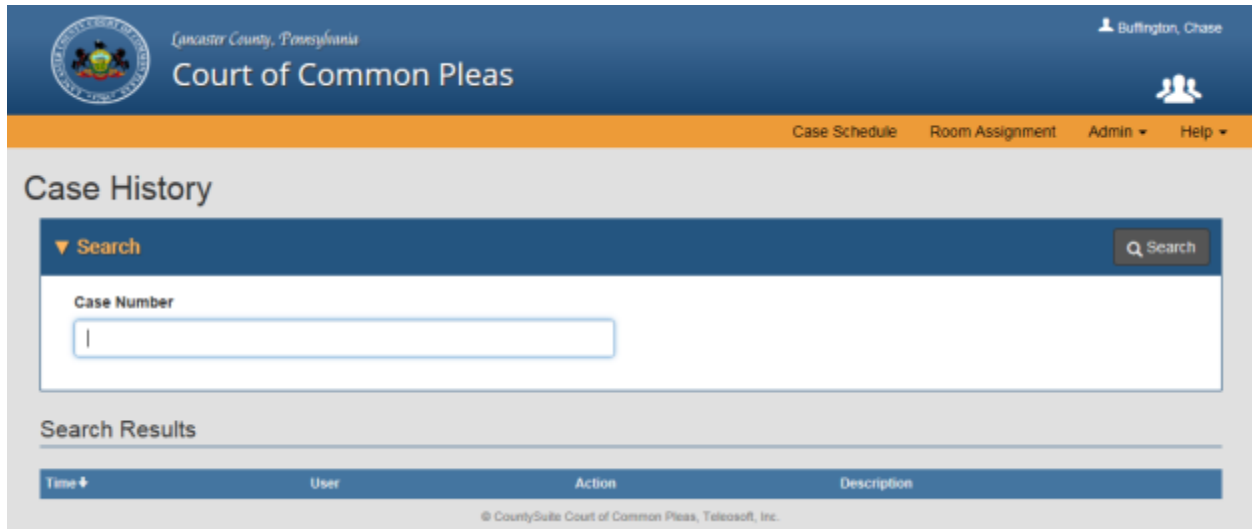
- To re-order the list of results, select the desired column heading. Selecting a heading multiple times will toggle ascending and descending order:



Case ↑	Event Type	Ro
List Event	List Event	Co 1
List Event	List Event	Co 1

How to Search Case History

From the Case Schedule screen, select the Admin drop down menu, then select **Case History**. The Case History screen will be displayed.



Case History

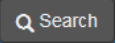
Search

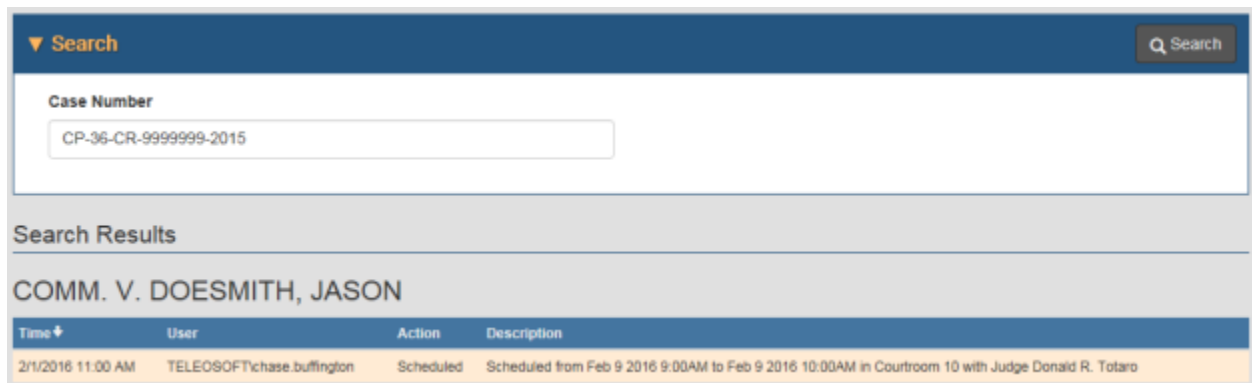
Case Number

Search Results

Time	User	Action	Description

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- Enter all or a part of the case number into the Search box. The type-ahead feature will return suggestions based upon the characters entered. Select the desired Case Number and press <Enter> or select .



Search

Case Number

CP-36-CR-9999999-2015

Search Results

COMM. V. DOESMITH, JASON

Time	User	Action	Description
2/1/2016 11:00 AM	TELEOSOFT\chase buffington	Scheduled	Scheduled from Feb 9 2016 9:00AM to Feb 9 2016 10:00AM in Courtroom 10 with Judge Donald R. Totaro

- The search results will display historical information related to the case number that matches the search text, including the Time of the action, the User that performed the action, the Action taken, and a brief description of the action.

How to Search the Audit Log

From the Case Schedule screen, select the Admin drop down menu, then select **Audit Log**. The Audit Log screen will be displayed.

The screenshot shows the 'Search Audit Log' interface. At the top, there is a header for 'Lancaster County, Pennsylvania Court of Common Pleas' with a user profile for 'Bullington, Chase'. Below the header are navigation tabs for 'Case Schedule', 'Room Assignment', and 'Admin'. The main section is titled 'Search Audit Log' and contains a 'Search Criteria' form with the following fields:

- 1. StartDate: 9/1/2015
- 2. EndDate: 10/16/2015
- 3. User Name: (empty)
- 4. Actions: Created
- 5. Source Types: Case Schedule
- 6. Case Number or Caption: Search Text
- 7. Max Rows: 50



Below the search criteria is a 'Search Results' section with a table displaying the following data:

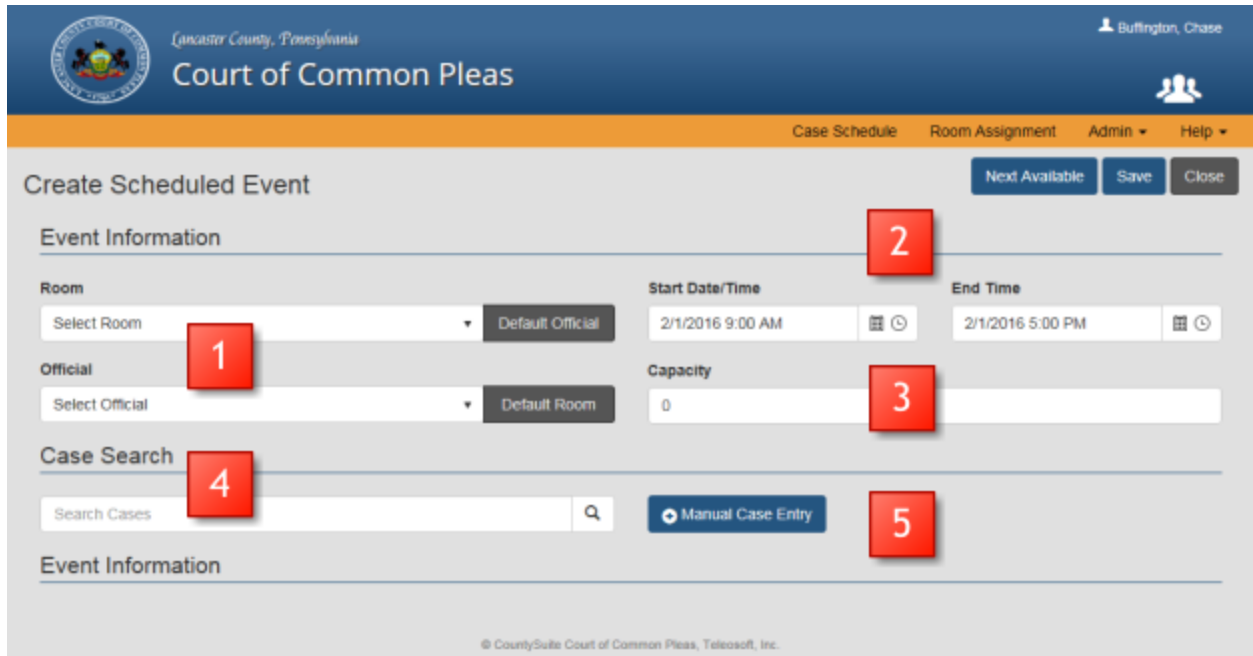
Action Date	Action	Source	Source Date	Type	User	Description	Delete Reason
10/2/2015 9:11 AM	Created	List Event	3/4/2014	Case Schedule	TELEOSOFTrob hallquist		
10/2/2015 9:11 AM	Created	List Event	11/12/2014	Case Schedule	TELEOSOFTrob hallquist		
10/2/2015 9:11 AM	Created	List Event	2/5/2014	Case Schedule	TELEOSOFTrob hallquist		

Step-by-step

1. Select the Start and End dates to narrow the search results within a specific date range.
2. Enter all or part of a user name to find Actions taken by particular users.
3. Limit the maximum number of rows returned in the search results.
4. Filter the results by the type of Action.
5. Select the Source Type where the Actions were taken.
6. Enter all or part of the Case Number or Caption text to include in the search results.
7. The Search Results grid displays historical data by Action Date, Action, Source, Source Date, Type, User, Description, and Delete Reason, if applicable.


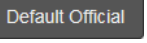
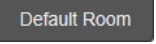


How to Create a Scheduled Event

From the Case Schedules screen, select either the  New button at the top of the screen or the  button for a particular listed Room. The Create Scheduled Event screen will be displayed.




The screenshot shows the 'Create Scheduled Event' interface. At the top, there's a navigation bar with 'Case Schedule', 'Room Assignment', 'Admin', and 'Help'. Below that, the 'Event Information' section contains: 'Room' (dropdown with 'Select Room' and 'Default Official' button), 'Start Date/Time' (text field with '2/1/2016 9:00 AM' and calendar/clock icons), 'End Time' (text field with '2/1/2016 5:00 PM' and calendar/clock icons), 'Official' (dropdown with 'Select Official' and 'Default Room' button), and 'Capacity' (text field with '0'). The 'Case Search' section has a 'Search Cases' input field and a 'Manual Case Entry' button. At the bottom, there's another 'Event Information' section. Red callouts 1-5 point to the 'Select Room' dropdown, the date/time fields, the 'Capacity' field, the 'Search Cases' field, and the 'Manual Case Entry' button respectively.

Step-by-step

1. Select the Room and Official for the Event from the drop down menus (these will already be set if the  button was selected on the Case Schedules screen). Selecting  or  will display the associated Official and Room, respectively (if applicable).
2. Enter the Event Start Date/Time and End Time by either typing the date into the text field or by selecting the  and  icons and then selecting the date from the calendar and the time from the drop down menu.
 - o Entering an End Date greater than the Start Date will display the Weekly section for recurring events:



- Check the days on which the event should occur on a weekly basis, within the specified date range.
 - To find the Next Available date for scheduling, see the section on [How to Select the Next Available Date](#).
3. To schedule openings for multiple cases during a time block (called a **List Event**), set the **Capacity** to a number greater than 0.
 4. To search for an existing Case, enter the Case Number into the Case Search box and press <Enter> or select . A list of Cases matching the entered text will be displayed.

Case Search Results ✕

Case Number	Plaintiff	Defendant
CI-00-00001	Debra j Bryden	Robert e Bryden jr
CI-00-00002	Beverly ann Moore	Michael e Moore
CI-00-00003	Ramonita Mestre	Pedro Salas
CI-00-00004	Daniel Harman	Thomas Cedar
CI-00-00005	Mary A Falcone	Thomas B Groff
CI-00-00006	Ocwen federal bank	John Doe
CI-00-00007	Sherwin williams co	Herr construction inc
CI-00-00008	Bank of lancaster county na	Shiraz T Sugarwala
CI-00-00009	Shannon L Mccomsey	Torrey E Colbert

Cancel

- Select the grid line of the desired Case.
 - The Court Case dialog box will display, allowing the user to enter the Caption, the Event Category, the Event Type, the Case Event Attributes, the Notes (both public and private), the Language, and the Outcome.
 - Select Save.
5. To manually add a case to the Event, select the Manual Case Entry button.

Court Case
✕

Case Number

Caption

Event Type

Attributes


🚫
🔒
🏛️
☎️
💻
👤

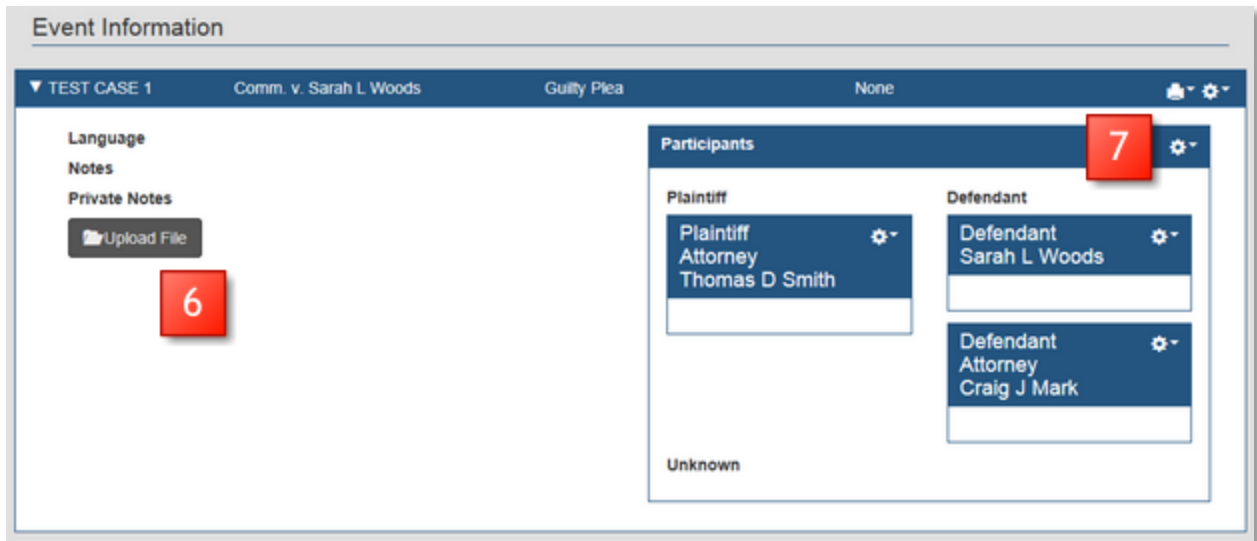
Notes

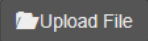

Private Notes

Language



Outcome

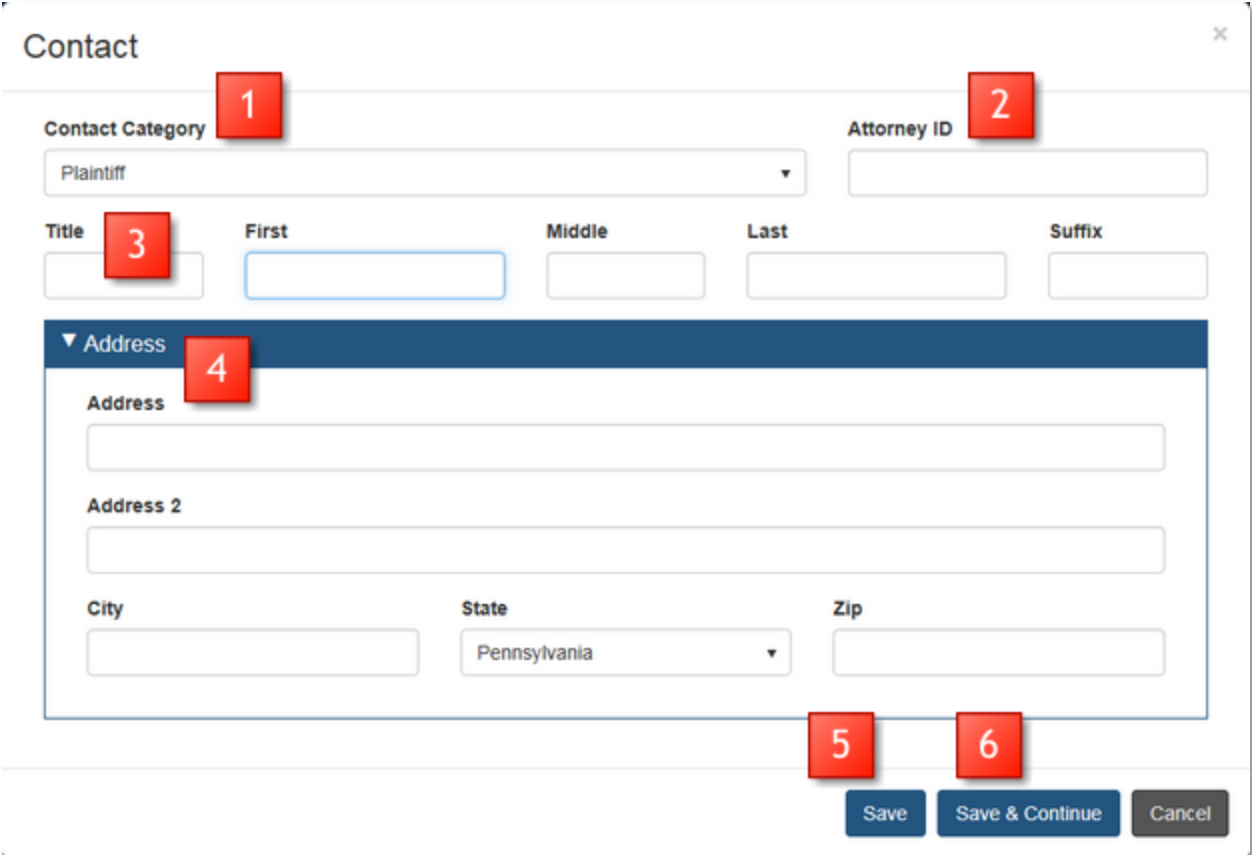
- The Court Case dialog box will allow the user to enter the Case Number, a Caption, Event Category, Event Type, Case Event Attributes, Notes (both public and private), Language, and Outcome.
- Select .



6. To attach a file to the Event, select .
7. To add Case Participants, see the section on [How to Add Case Participants](#).
8. Select  to save the Scheduled Event.

How to Add Case Participants

From the Create Scheduled Event screen, select the  button in the Participants section of the Event Information, and then  from the drop down.

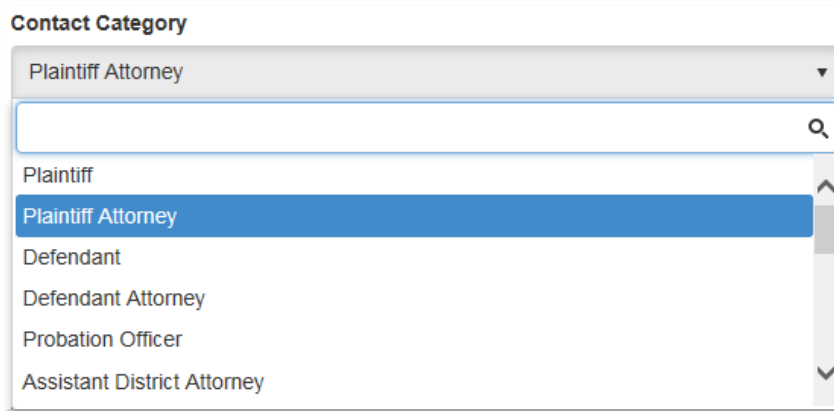


The screenshot shows a 'Contact' form with the following fields and callouts:

- 1**: Contact Category (dropdown menu, currently set to 'Plaintiff')
- 2**: Attorney ID (text input field)
- 3**: Title (text input field)
- 4**: Address (collapsible section containing:
 - Address (text input field)
 - Address 2 (text input field)
 - City (text input field)
 - State (dropdown menu, currently set to 'Pennsylvania')
 - Zip (text input field)
- 5**: Save (button)
- 6**: Save & Continue (button)
- Cancel (button)

Step-by-step

1. Select the Category for the Contact.



Contact Category

Plaintiff Attorney ▼

Search

Plaintiff ▲

Plaintiff Attorney

Defendant

Defendant Attorney

Probation Officer

Assistant District Attorney ▼

2. Enter the Attorney ID, if applicable.
3. Enter the Contact's name.
4. Enter the Contact's address.
5. Select **Save** to save the Contact information and close the dialog box.
6. Select **Save & Continue** to save the Contact information and clear the dialog box to enter a new Contact.

How to Select the Next Available Date

From the Create Scheduled Event screen, select [Next Available](#) at the top of the screen.

The screenshot shows a search interface titled "Next Available Dates" with a close button (X) in the top right corner. The interface contains several input fields, each with a red numbered callout:

- 1**: "Event" dropdown menu with "Select Event" text.
- 2**: "Start Date" field with "2/1/2016" and a calendar icon.
- 3**: "Dates to return" field with "10" and a spinner icon.
- 4**: "Hours" field with "0" and a spinner icon.
- 5**: "Start" time field with "9:00 AM" and a clock icon.
- 6**: "Room" dropdown menu with "Select Room" text.
- 7**: "Official" dropdown menu with "Select Official" text.

Below the input fields is a "Search Results" section, which is currently empty. At the bottom right of the interface are two buttons: "Search" (blue) and "Close" (grey).

Step-by-step

1. Choose the Event Type.
2. Choose the date from which to Start the search.
3. Choose the number of dates to return in the search results.
4. Choose the block of time in hours and minutes.
5. Choose the time of day.

- Note: Entering the Hours and/or Minutes will cause the Start and End times to act as a time range within which the application will search for the block of time. If Hours and Minutes are set to 0, then the Start and End time will act as a single open block of time (ex. For an all-day opening, set the Hours and Minutes to 0, and then set the Start time to 9 AM and the End time to 5 PM)

6. Choose the room to check for availability.

7. Choose the Official.

8. Select .



The Search Results will show schedule availability by Date, Room, Official, Event, and Times. Select the drop down under the Times column, the desired time block, and then .

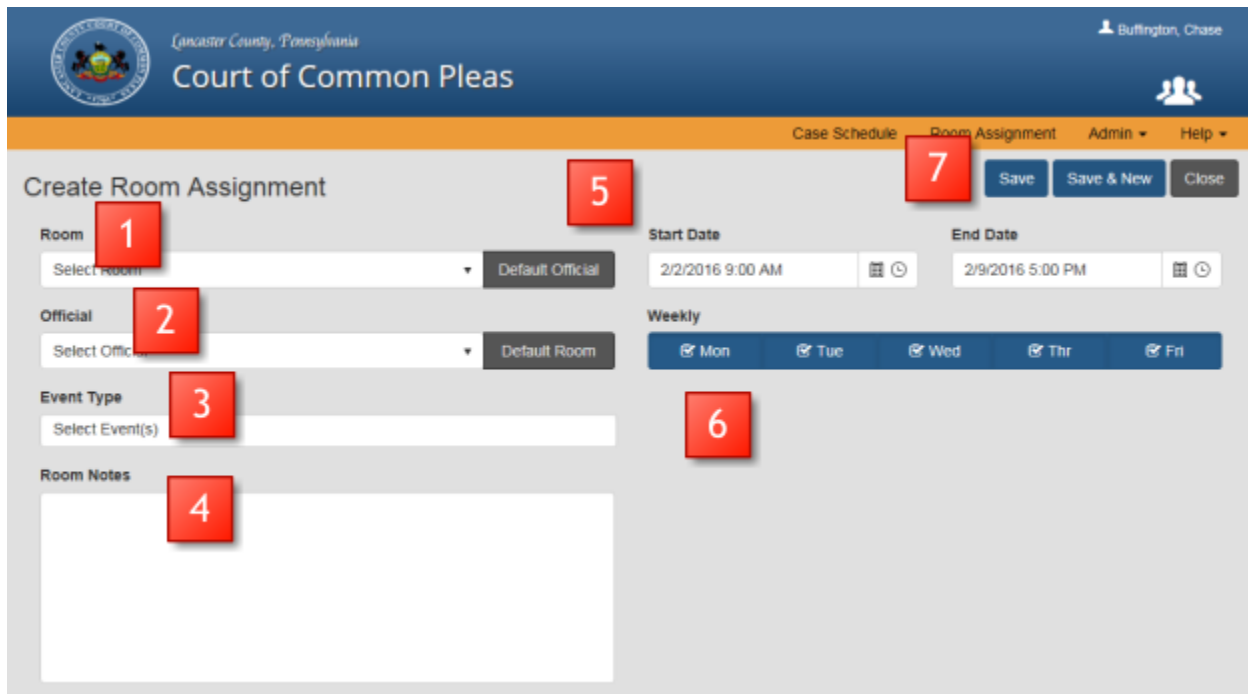
Search Results

Date	Room	Official	Event	Times	
2/2/2016	Courtroom 3	Howard F Knisely	Criminal Trials	9:00 AM - 9:30 AM ▼	<input type="button" value="Select"/>
2/2/2016	Courtroom 7	Christopher A. Hackman	Family Business Court - Letters Q, R, & So	9:00 AM - 9:30 AM ▼	<input type="button" value="Select"/>
2/2/2016	Courtroom 8	Dennis E Reinaker	Video Hearings	9:00 AM - 9:30 AM ▼	<input type="button" value="Select"/>
2/2/2016	Courtroom 12	David L Ashworth	Criminal Trials	9:00 AM - 9:30 AM ▼	<input type="button" value="Select"/>

The selected values will then be automatically populated on the [Create Scheduled Event](#) screen.




How to Create a Room Assignment

From the Room Assignment screen, select either the  button at the top of the screen or the  button for a particular listed Room.



The screenshot shows the 'Create Room Assignment' form in the CountySuite application. The form is titled 'Create Room Assignment' and is part of the 'Room Assignment' section. It includes fields for Room (1), Official (2), Event Type (3), Room Notes (4), Start Date (5), End Date (6), and a Weekly schedule (7). The Start Date is set to 2/2/2016 9:00 AM and the End Date is 2/9/2016 5:00 PM. The Weekly schedule is set to Mon, Tue, Wed, Thu, and Fri. The form also has 'Save', 'Save & New', and 'Close' buttons.

Step-by-step

1. On the Create Room Assignment screen, select the Room from the drop down menu (this will already be set if the  button was selected on the Room Assignment screen).
2. Select the Official from the drop down menu.
3. Select the Event Type from the drop down menus. Additional Event Types can be added by clicking on the Event Type bar and selecting from the drop down menu.
4. Enter any notes regarding the Room Assignment in the Room Notes field.
5. Enter the Event start and End dates by either typing the date into the text field or by selecting the  and  icons and then selecting the date from the calendar and the time from the drop down menu.


6. To create a recurring Event, select a Start date and a different End date. A grid will appear, showing the days of the week on which the Event will occur. Add or remove days by selecting the checkboxes:

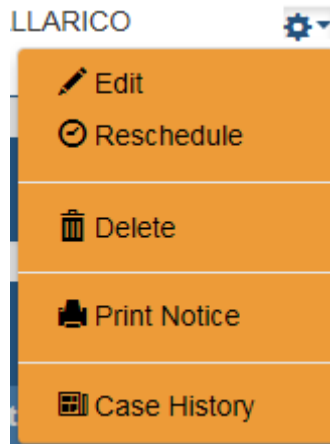
Weekly


<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Tue	<input checked="" type="checkbox"/> Wed	<input type="checkbox"/> Thr	<input checked="" type="checkbox"/> Fri
---	------------------------------	---	------------------------------	---

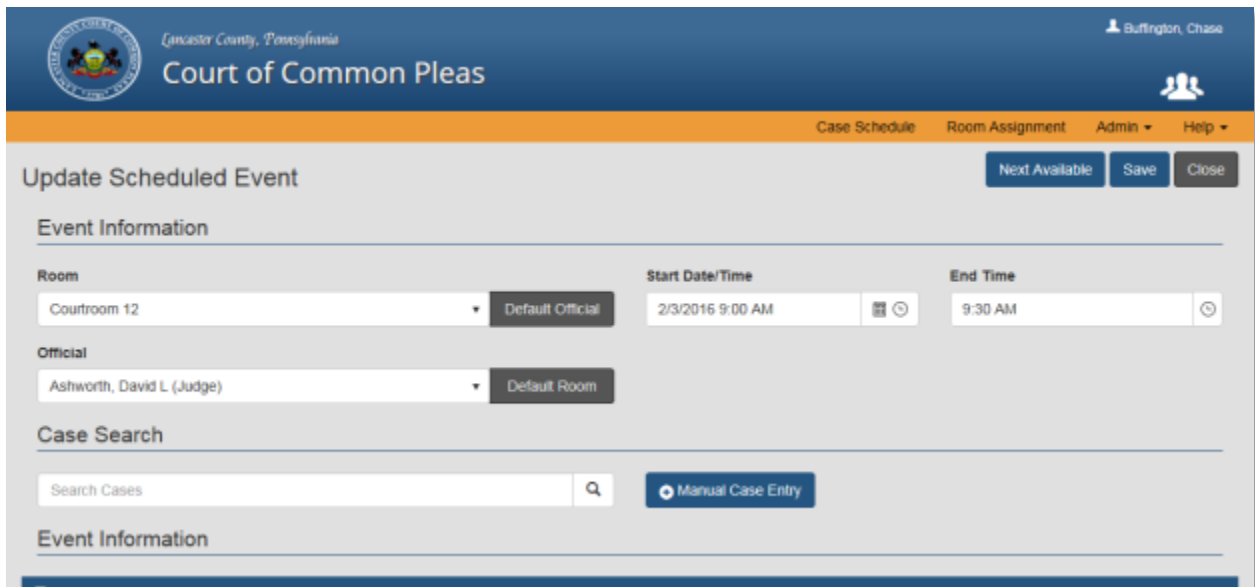
- The Event will now occur on the selected days of the week, between the specified start and end dates.
7. Select **Save** to save the Room Assignment, or **Save & New** to save the current Room Assignment and clear all information except for the dates.

How to Modify a Scheduled Event

On the Case Schedules screen, select the  icon on the desired Case:



- **Edit** - This will display the Update Scheduled Event screen, which allows the user to change the Room, Official, Start Date, and Capacity, as well as add Events, upload files, and modify the Event Participants. Select  to commit the changes.

A screenshot of the 'Update Scheduled Event' screen in the CountySuite application. The header shows 'Lancaster County, Pennsylvania Court of Common Pleas' and the user 'Buffington, Chase'. The main content area has a title 'Update Scheduled Event' and buttons for 'Next Available', 'Save', and 'Close'. Below the title is an 'Event Information' section with three columns: 'Room' (Courtroom 12), 'Start Date/Time' (2/3/2016 9:00 AM), and 'End Time' (9:30 AM). There are also 'Default Official' and 'Default Room' buttons. A 'Case Search' section includes a search box and a 'Manual Case Entry' button. The bottom of the screen shows another 'Event Information' section.

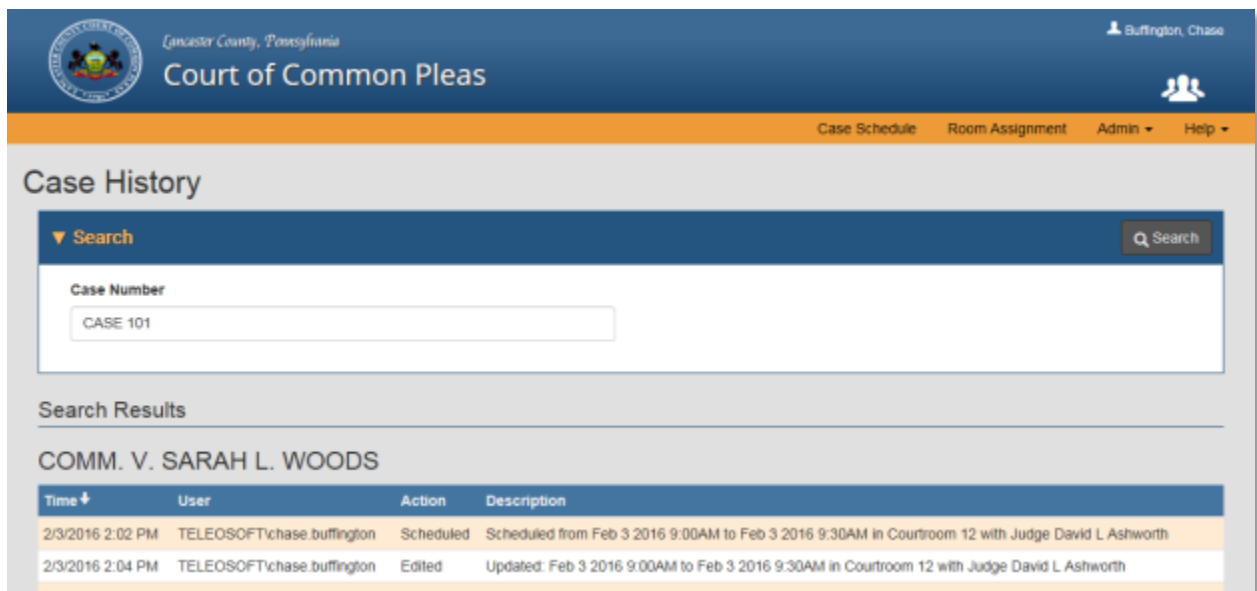
- **Reschedule** – Change the date and time of the Event. Select a reason for the reschedule, a new Room Assignment, a new Official, and new Date and Times. Event Information can also be edited on this screen. Select **Save** to commit the changes.

- **Delete** – Delete the Event. Select a reason for the deletion from the drop down and select **Yes**.

- **Print Notice** – Prints the notice to send out to Case Participants.

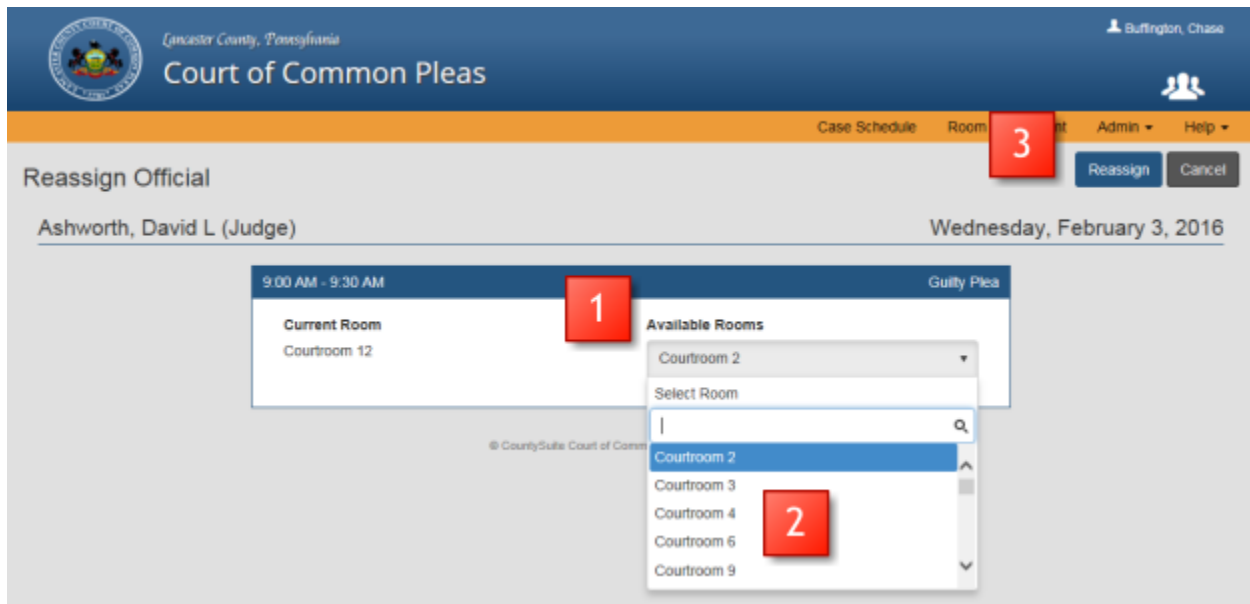


- **Case History** – This will display the Case History screen.



How to Reassign an Official

On the Case Schedule screen, select the Court Official's name on the Scheduled Event. The Reassign Official screen will display, showing the current assignment.



Step-by-step

1. Select the Available Rooms drop down.
2. Select the new room.
3. Select **Reassign** to commit the change.

How to Add/Edit Official Absences

From the Case Schedules select the Admin drop down menu and select **Official Absence**. The Official Absence screen will be displayed.


The screenshot shows the 'Official Absence' interface. At the top, there is a header for 'Lancaster County, Pennsylvania Court of Common Pleas' with a user profile for 'Buffington, Chase'. A navigation bar includes 'Case Schedule', 'Room Assignment', 'Admin', and 'Help'. The main content area is titled 'Official Absence' and features an 'Add Absence' button. Below this is a 'Search Criteria' section with a search bar and a 'Reset' button. The search criteria include a dropdown for 'Official' (currently showing 'Select Official'), a date field for 'Start Date' (2/3/2016), and an empty date field for 'End Date'. Below the search criteria is a 'Search Results' section with a table header: 'Name', 'Start Date', 'End Date', and 'Description'. A copyright notice at the bottom reads '© CountySuite Court of Common Pleas, Teleosoft, Inc.'

Step-by-step

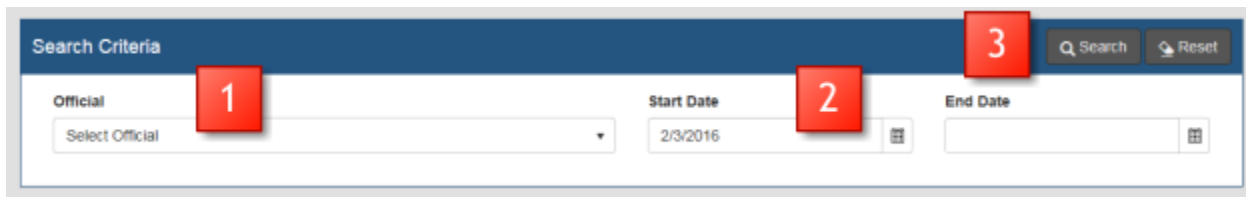
1. Select .

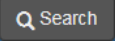
The screenshot shows the 'Court Official Absence' modal form. It has a close button (X) in the top right corner. The form contains the following fields and steps:

- Official:** A dropdown menu with 'Select Official' as the current selection. A red box with the number '2' is overlaid on the dropdown arrow.
- Description:** A dropdown menu with 'Conference' as the current selection. A red box with the number '3' is overlaid on the dropdown arrow.
- Start Date:** A date and time field showing '2/3/2016 9:00 AM'. A red box with the number '4' is overlaid on the field.
- End Date:** A date and time field showing '2/3/2016 5:00 PM'. A red box with the number '5' is overlaid on the field.
- Buttons:** At the bottom right, there are 'Save' and 'Cancel' buttons. A red box with the number '5' is overlaid on the 'Save' button.

2. Select the Official.
3. Select a description for the absence.
4. Enter the Start and End dates for the absence.
5. Select .

To Edit or Delete an existing Absence, enter search criteria:


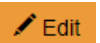




1. Select the Official.
2. Enter the Start and End dates for the absence.
3. Select .

A list of results matching the search criteria will be displayed in the Search Results grid.



Name	Start Date	End Date	Description
Sponaugle, Thomas B	2/3/2016 11:30 AM	2/3/2016 5:00 PM	Vacation
Cullen, James P	3/7/2016 9:00 AM	3/7/2016 5:00 PM	Vacation
Hackman, Christopher A.	6/15/2016 9:00 AM	6/17/2016 5:00 PM	Vacation
Reuter, William G	7/26/2016 9:00 AM	7/26/2016 5:00 PM	Conference

- Select .
- Select  to modify the absence, or  to delete the absence.
- Selecting  displays the Court Official Absence dialog.

Court Official Absence ×

Official
Sponaugle, Thomas B (Judge) ▼

Description 4
Vacation ▼

Start Date 5 2/3/2016 11:30 AM 📅 ⌚ **End Date** 2/3/2016 5:00 PM 📅 ⌚

6 Save Cancel

4. Select the description.
5. Change the Start Date and/or End Date.
6. Select Save.

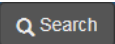
How to Search for a User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.

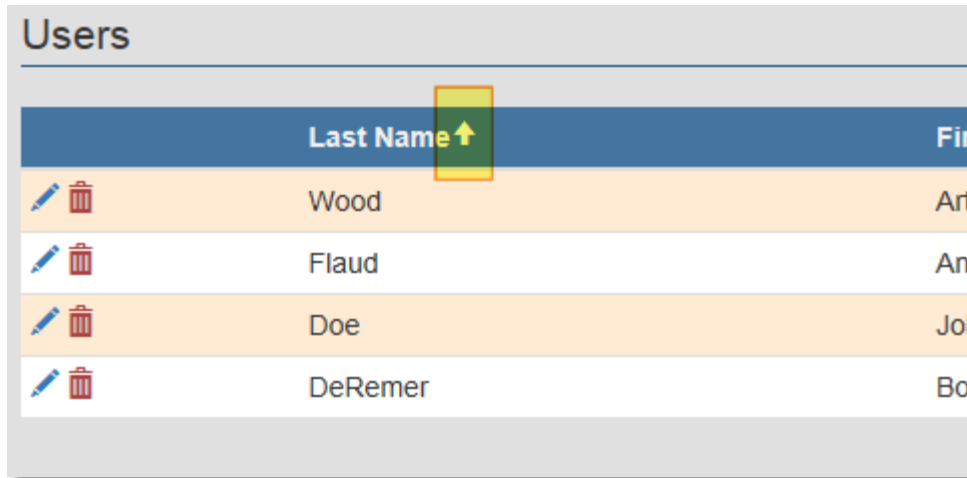
The screenshot shows the 'Security Users' search interface. The 'Search Criteria' section (1) contains four input fields: 'First Name', 'Last Name', 'Login Name', and 'Role' (a dropdown menu). A 'Search' button (2) is located to the right of the search criteria. Below the search criteria is a table titled 'Users' (3) with the following data:









Last Name	First Name	Initials	Login Name	Roles	Active
Brown	Ben	BB	ben.brown	Administrator	✓
Buffington	Chase	CB	chase.buffington	Administrator	✓

Step-by-Step

1. Enter all or part of the user's First Name, Last Name, Windows LoginName, and/or Role into the search boxes.
2. Press <Enter> or select .
3. The search result grid will return the list of users that match the entered criteria.

4. To customize the order in which the results are displayed, select the column header. The results can be ordered by Last Name, First Name, Initials, Login Name, and Roles.



Users			
	Last Name ↑		First Name
 	Wood		Art
 	Flaud		An
 	Doe		Jo
 	DeRemer		Bo

How to Add a New User


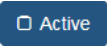

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.

The screenshot shows the 'Security Users' interface. At the top, there is a header for 'Lancaster County, Pennsylvania Court of Common Pleas' with a user profile for 'Buffington, Chase'. Below the header are navigation tabs for 'Case Schedule', 'Room Assignment', and 'Admin'. The 'Security Users' section features a 'New User' button (marked with a red '1') and a search criteria form with fields for 'First Name', 'Last Name', 'Login Name', and 'Role' (a dropdown menu). Below the search form is a section labeled 'Users'.

Step-by-step

1. Select the  button.

The 'User' dialog box contains the following elements: an 'Active' checkbox (marked with a red '4'), input fields for 'First Name', 'Last Name' (marked with a red '2'), 'LoginName', and 'Initials', an 'Assigned' section (marked with a red '3') which is currently empty, and an 'Unassigned' section with a list of roles: 'Administrator', 'Public', 'Full Scheduling', 'Limited Scheduling', and 'Judicial'. At the bottom right, there are 'Save' and 'Cancel' buttons (marked with a red '5').

2. Enter the new user's First Name, Last Name, Windows LoginName, and Initials.
3. Choose the role(s) to assign to the user by selecting  next to each role.
4. Check the  box to set the user's status to active/inactive.
5. Select .

How to Edit a User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.

The screenshot displays the 'Security Users' page. At the top, there is a navigation bar with 'Case Schedule', 'Room Assignment', and 'Admin' (with a dropdown arrow). Below the navigation bar, the page title 'Security Users' is shown next to a 'New User' button. The main content area is divided into two sections: 'Search Criteria' and 'Users'.

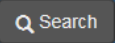


The 'Search Criteria' section contains four input fields: 'First Name', 'Last Name', 'Login Name', and 'Role'. A red box with the number '1' is placed over the 'Search Criteria' header. To the right of these fields are 'Search' and 'Reset' buttons.





The 'Users' section contains a table with the following data:

Last Name	First Name	Initials	Login Name	Roles	Active
Buffington	Chase	CB	chase.buffington	Administrator	✓
Hallquist	Rob	RDH	rob.hallquist	Administrator	✓

A red box with the number '2' is placed over the gear icon in the 'Active' column of the first row.

Step-by-step

1. Enter the users First Name, Last Name, Login Name, and/or Role into the search boxes. Press <Enter> or select .
2. Select the  icon on a specific user's grid line in the search results, then select .

3. Edit the new user's First Name, Last Name, Windows LoginName, and/or Initials.
4. Edit the role(s) for the user by selecting  to remove roles or  to add roles.
5. Check the  box to set the user's status to active/inactive.
6. Select  to commit the changes.

How to Delete a User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.

Security Users


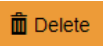

Search Criteria

First Name Last Name Login Name Role

Users

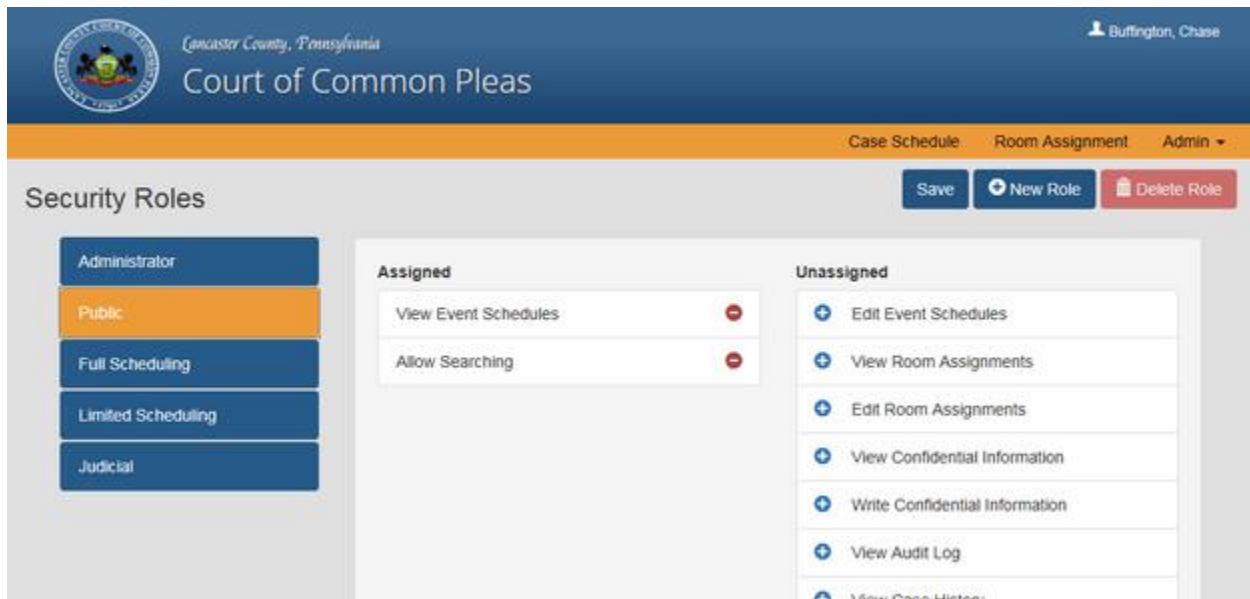
Last Name	First Name	Initials	Login Name	Roles	Active
Buffington	Chase	CB	chase.buffington	Administrator	✓
Hallquist	Rob	RDH	rob.hallquist	Administrator	✓

Step-by-step

1. Enter the users First Name, Last Name, Login Name, and/or Role into the search boxes.
2. Select the  icon on a specific user's grid line in the search results, then select .
3. Select  to confirm the user deletion.

How to View Security Role Permissions

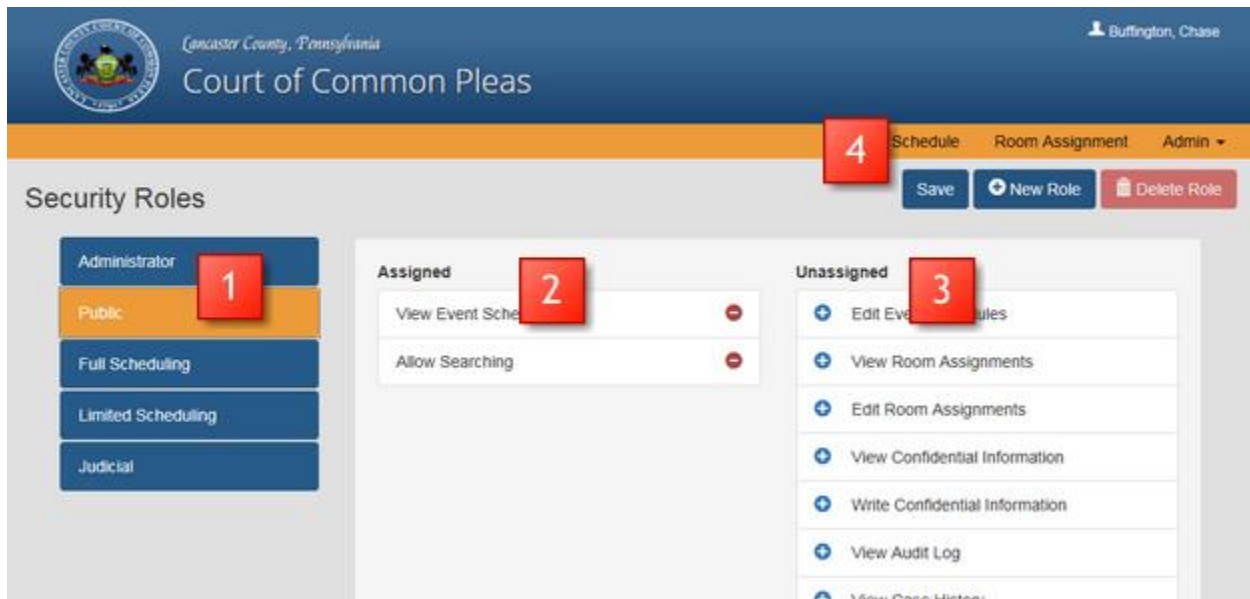
From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.






- Select a role listed on the left side of the screen.
- Permissions that have been assigned to this role will appear under the “Assigned” column, and permissions that have not been assigned to this role will appear under the “Unassigned” column.

How to Edit Security Role Permissions

From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.



Step-by-step

1. Select a role listed on the left side of the screen.
2. Select the  on the “Assigned” permissions to remove them from the role.
3. Select the  on the “Unassigned” permissions to add them to the role.
4. Select  to commit the changes.

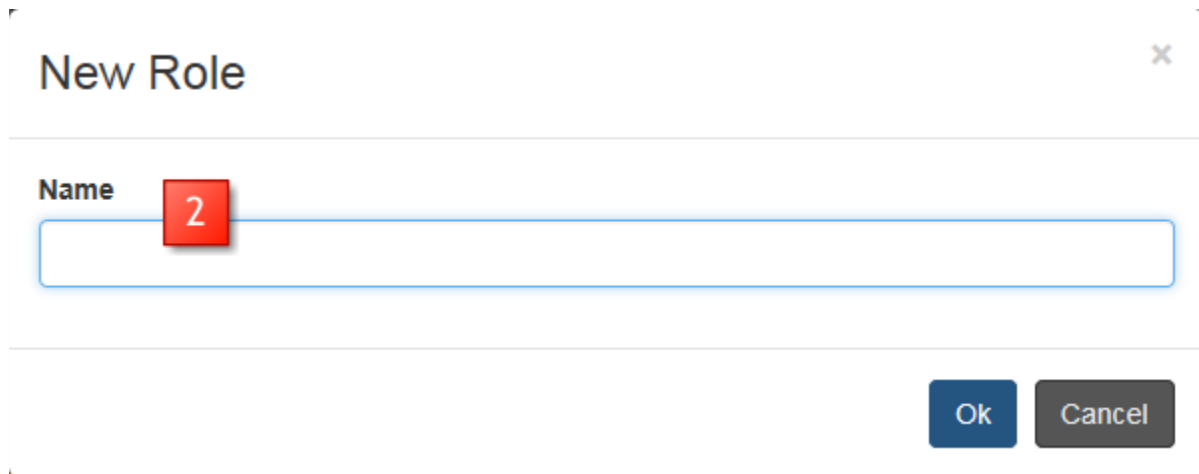
How to Add a Security Role


From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.

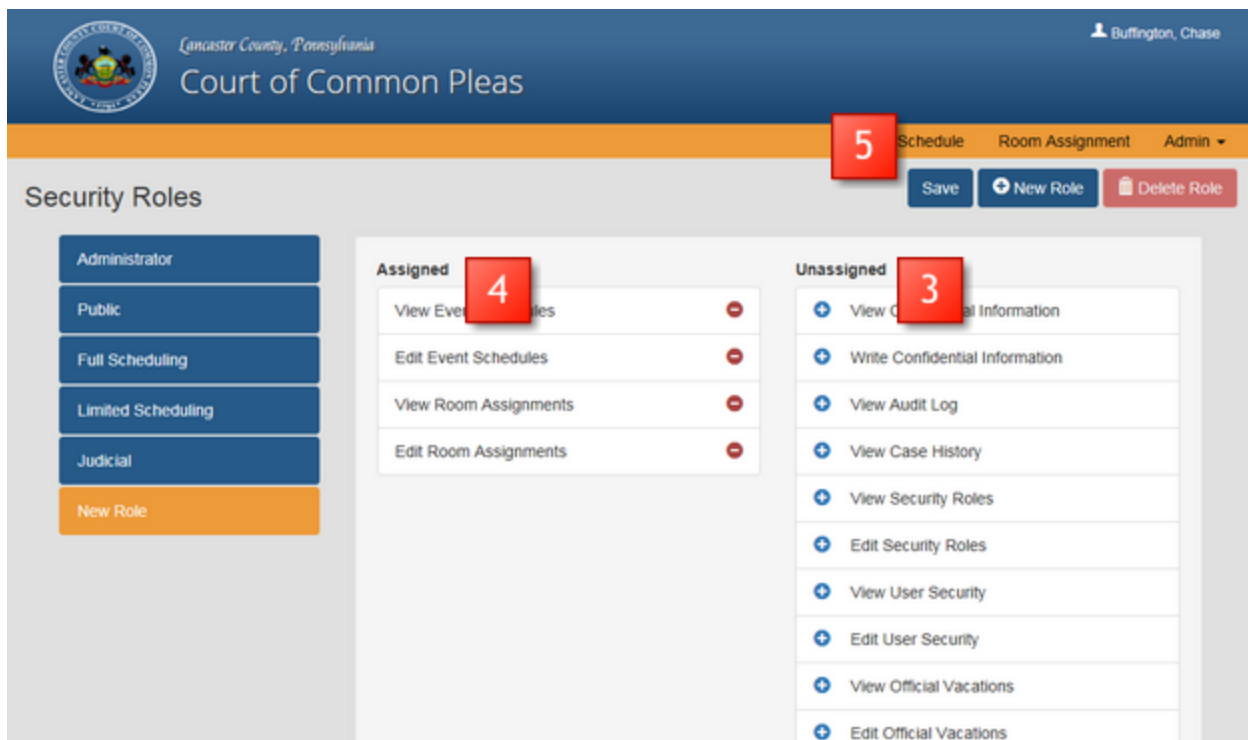





Step-by-step

1. Select the  button at the top of the screen.

The 'New Role' dialog box is shown. It has a title bar with 'New Role' and a close button. Below the title bar, there is a label 'Name' followed by a text input field. A red square with the number '2' is overlaid on the input field. At the bottom right of the dialog, there are two buttons: 'Ok' and 'Cancel'.

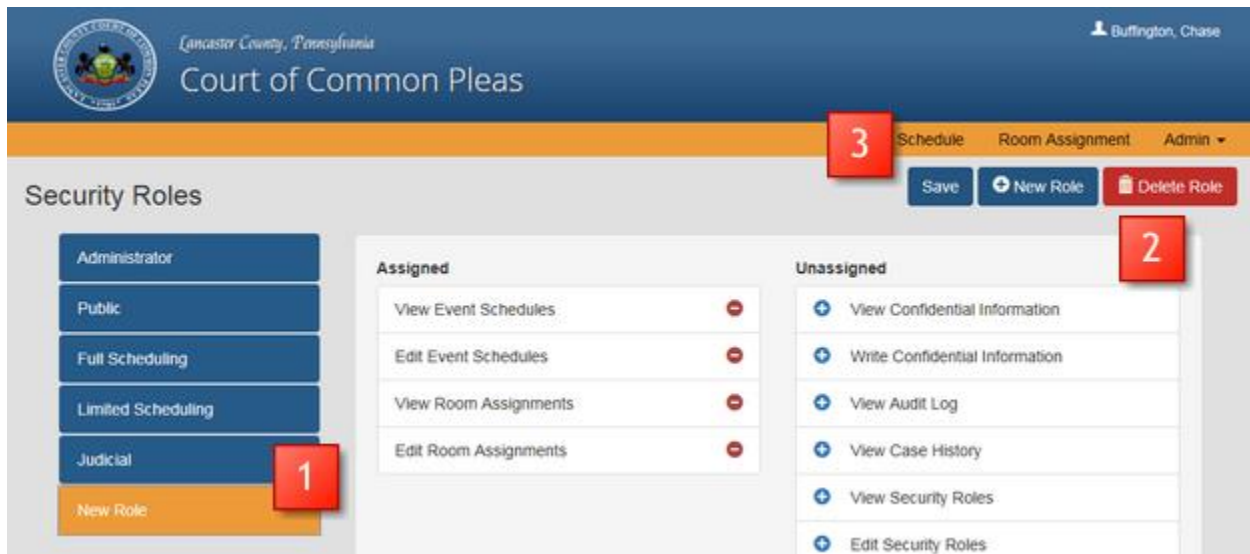
2. Enter the title of the new security role into the "Name" text box and select .



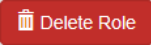

3. Select the  on the “Unassigned” permissions to add them to the role.
4. Select the  on the “Assigned” permissions to remove them from the role.
5. Select the  button at the top of the screen.

How to Delete a Security Role

From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.



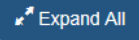

Step-by-step

1. Select the role to be deleted on the left side of the screen.
2. Select the  button at the top of the screen.
3. Select the  button at the top of the screen.

How to View Room Assignment Categories and Events

From the Case Schedule screen, select the Admin drop down menu, then select **Room Assignment Events**. The Edit Room Assignment Events screen will be displayed.

Category	Active	Settings
▼ Orphans Court	<input checked="" type="checkbox"/>	⚙️
Guardianship Hearing	<input checked="" type="checkbox"/>	⚙️
MH/MR (BHDS) Expungement	<input checked="" type="checkbox"/>	⚙️
Incapacity Review	<input checked="" type="checkbox"/>	⚙️
Guardian of a Minor	<input checked="" type="checkbox"/>	⚙️
▶ Juvenile Delinquency	<input checked="" type="checkbox"/>	⚙️
▶ Domestic Relations	<input checked="" type="checkbox"/>	⚙️
▶ Criminal	<input checked="" type="checkbox"/>	⚙️

- The Room Assignment Categories will be listed.
- In order to view the Events under each Category, select the carat ▶ on each Category, or  at the top of the screen to see all Events.
- Selecting  at the top of the screen will hide all Events.

How to Add/Delete Room Assignment Categories and Events

From the Case Schedule screen, select the Admin drop down menu, then select **Room Assignment Events**. The Edit Room Assignment Events screen will be displayed.

Note: To apply all changes made to Room Assignment Categories and Events, select **Save** at the top of the screen.

The screenshot displays the 'Edit Room Assignment Events' interface. At the top, there are navigation tabs for 'Case Schedule', 'Room Assignment', and 'Admin'. Below these are buttons for 'Save', '+ New Category', 'Expand All', and 'Collapse All'. The main content area lists four categories:

- Orphans Court** (Active, checked, gear icon):
 - Guardianship Hearing (checked, gear icon)
 - MHMR (BHDS) Expungement (checked, gear icon)
 - Incapacity Review (checked, gear icon)
 - Guardian of a Minor (checked, gear icon)
- Juvenile Delinquency** (Active, checked, gear icon)
- Domestic Relations** (Active, checked, gear icon)
- Criminal** (Active, checked, gear icon)



Step-by-step

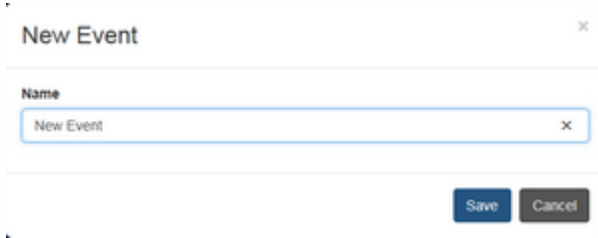
1. To create a new **Category**, select the **+ New Category** button at the top of the screen.

The 'New Category' dialog box is shown with the following details:


- Title: New Category
- Field: Name (input field containing 'New Category')
- Buttons: Save, Cancel



2. Enter the name of the Category and select .

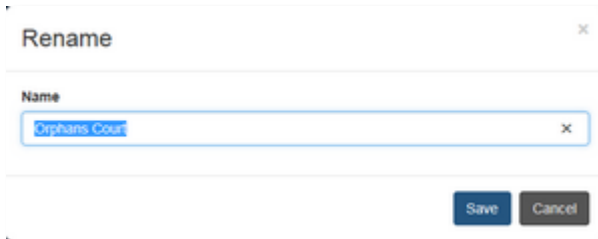
3. To create a new **Event**, select the  icon on a specific Category's grid line, then select .



A dialog box titled "New Event" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "New Event" inside. At the bottom right, there are two buttons: "Save" and "Cancel".



4. Enter the name of the Event and select .

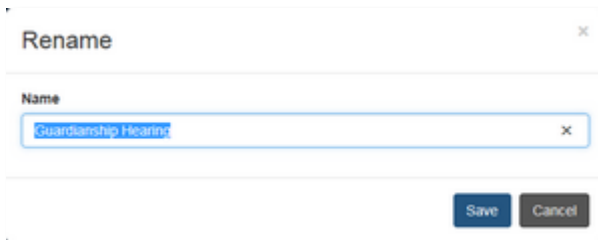
5. To Edit a Room Assignment Category, select the  icon on a specific Category's grid line, then select .












A dialog box titled "Rename" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "Orphans Court" inside. At the bottom right, there are two buttons: "Save" and "Cancel".

6. Enter the new Category name, and select .

7. To Edit a Room Assignment Event, select the  icon on a specific Event's grid line, then select .



A dialog box titled "Rename" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "Guardianship Hearing" inside. At the bottom right, there are two buttons: "Save" and "Cancel".

8. Enter the new Event name, and select .
9. To Delete a Category, select the  icon on a specific Category's grid line, then select .
 - If  is not displayed in the drop down menu, that Category is currently being used and may not be deleted until there are no longer any active Cases using it.
10. Select  to confirm the deletion.
11. To Delete an Event, select the  icon on a specific Event's grid line, then select .
 - If  is not displayed in the drop down menu, that Event is currently being used and may not be deleted until there are no longer any active Cases using it.
12. Select  to confirm the deletion.
13. Select the checkbox under the "Active" column to set the **Category** or **Events** to Active/Inactive.



- "Inactive" Categories and Events remain available under on the Edit Room Assignment Events page, but do not appear as options on the Create Room Assignment page.

How to Add/Delete Case Schedule Categories and Events

From the Case Schedule screen, select the Admin drop down menu, then select **Case Schedule Events**. The Edit Case Events screen will be displayed.

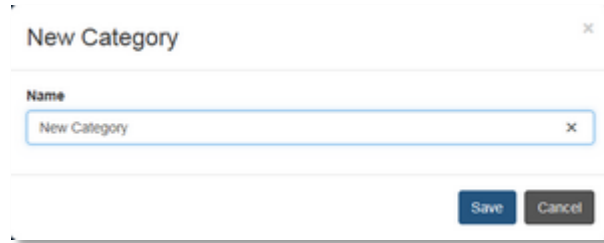
Note: To apply all changes made to Case Schedule Categories and Events, select **Save** at the top of the screen.


The screenshot displays the 'Edit Case Events' interface for the Lancaster County, Pennsylvania Court of Common Pleas. The page header includes the court's name and the user 'Buffington, Chase'. Navigation tabs for 'Case Schedule', 'Room Assignment', and 'Admin' are present. The main content area shows a table of case schedule events, organized into expandable categories. The 'Orphans Court' category is expanded, showing a list of events with checkboxes for 'Confidential', 'Case Required', and 'Active' status. Other categories like 'Juvenile Delinquency', 'Domestic Relations', and 'Criminal' are collapsed. At the top right of the main content area, there are buttons for 'Save', '+ New Category', 'Expand All', and 'Collapse All'.



Category	Confidential	Case Required	Active	Settings
Orphans Court	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Adoption Hearing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Emergency Guardianship Hearing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Permanent Guardianship Hearing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Guardianship Hearing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Termination of Parental Rights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Involuntary Termination of Parental Rights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
MH/MR (BHDS) Expungement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Estate Hearings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Incapacity Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Guardian of a Minor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Juvenile Delinquency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Domestic Relations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Criminal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⚙️

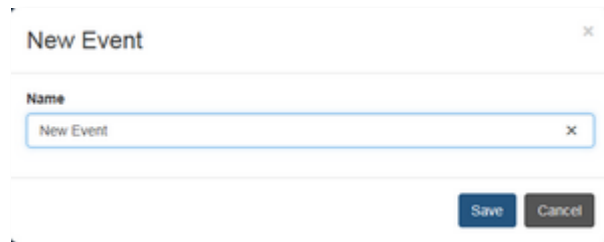
Step-by-step


1. To create a new **Category**, select the **+ New Category** button at the top of the screen.





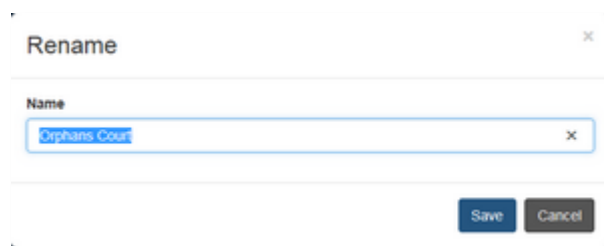
2. Enter the name of the Category and select .


3. To create a new **Event**, select the  icon on a specific Category's grid line, then select .





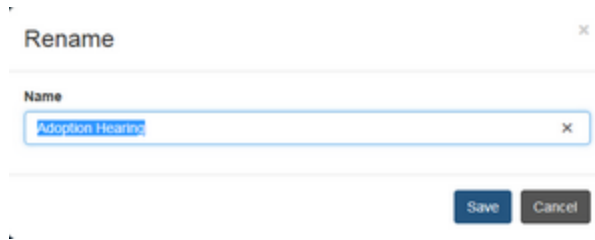
4. Enter the name of the Event and select .









5. To Edit a Case Schedule Event Category, select the  icon on a specific Category's grid line, then select .



6. Enter the name of the Category and select .

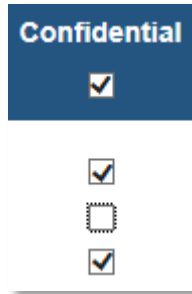
7. To Edit a Case Schedule Event, select the  icon on a specific Event's grid line, then select .



8. Enter the name of the Event and select .
9. To Delete a Category, select the  icon on a specific Category's grid line, then select 
 - If  is not displayed in the drop down menu, that Category is currently being used and may not be deleted until there are no longer any active Cases using it.
10. To Delete an Event, select the  icon on a specific Event's grid line, then select 
 - If  is not displayed in the drop down menu, that Event is currently being used and may not be deleted until there are no longer any active Cases using it.
11. Select  to confirm the deletion.
12. Select the checkbox under the "Active" column to set the **Category** or **Events** to Active/Inactive.



- "Inactive" Categories and Events remain available under on the Edit Case Events page, but do not appear as options on the Create Scheduled Event page.
13. To set the Confidential status of the Event type, select the checkbox under the "Confidential" column.



- Confidential Event types automatically set the “Confidential” () Court Case attribute. Only users with appropriate permission will be able to view confidential Events.

14. If the Event requires that a Case number be assigned upon Event creation, select the checkbox under the “Case Required” column.



How to Add an Attorney

From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.

The screenshot displays the Attorney Administration interface. At the top, the Lancaster County, Pennsylvania Court of Common Pleas logo and name are visible, along with the user name 'Buffington, Chase'. A navigation bar contains 'Case Schedule', 'Registration', and 'Admin'. A red box with the number '1' highlights the 'New Attorney' button. Below the search bar, a table titled 'Attorneys' is visible with columns for Attorney ID, Last Name, First Name, Middle Name, Suffix, Title, Address, Active, Chairperson, and Arbitrator.

Step-by-step

1. Select the  button.

The screenshot shows the 'Attorney' form with the following elements:

- Attributes (2):** A section with three checkboxes: Is Active, Is Chair Person, and Is Arbitrator.
- Attorney ID (3):** A text input field.
- Name Fields (4):** Text input fields for Title, First, Middle, Last, and Suffix.
- Address Section (5):** A collapsed section containing:
 - Address (5):** A large text input field.
 - Address 2:** A text input field.
 - City:** A text input field.
 - State:** A dropdown menu currently showing 'Pennsylvania'.
 - Zip:** A text input field.
- Buttons (6, 7):** Three buttons at the bottom right: 'Save' (6), 'Save & New' (7), and 'Cancel'.

2. Select the Attorney contact's attributes, including if the Attorney is an active user, a Chair Person, and/or an Arbitrator.
3. Enter the Attorney ID.
4. Enter the Attorney's name.
5. Enter the Attorney's address.
6. Select **Save** to save the Attorney Contact information and close the dialog box.
7. Select **Save & Continue** to save the Attorney Contact information and clear the dialog box to enter a new Contact.

How to Edit an Attorney




From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.

Attorney Administration

Search: michael

Attorney ID	Last Name	First Name	Middle Name	Suffix	Title	Address	Active	Chairperson	Arbitrator
A66755	ADAMS	MICHAEL	J				✓		⚙️
A75904	ALFANO	MICHAEL	D				✓		⚙️
A78421	ALFANO	MICHAEL					✓		⚙️
A55079	ALFIERI	MICHAEL A.					✓		⚙️
A87474	ALIVERNINI	MICHAEL	J				✓		⚙️

Step-by-step

1. Enter either all or part of the Attorney's First Name and Last Name, or the Attorney ID. Press <Enter> or select .
2. Select the  icon on a specific Attorney's grid line in the search results, then select .

Attorney x

Attributes 3

Is Active Is Chair Person Is Arbitrator

Attorney ID 4

A12345 x

Title **First** 5 **Middle** **Last** **Suffix**

Address 6

Address

Address 2

City **State** **Zip**

 ▼

7 8

3. Edit the Attorney contact's attributes, including if the Attorney is an active user, a Chair Person, and/or an Arbitrator.
4. Edit the Attorney ID.
5. Edit the Attorney's name.
6. Edit the Attorney's address.
7. Select to save the Attorney Contact information and close the dialog box.
8. Select to save the Attorney Contact information and clear the dialog box to enter a new Contact.

How to Delete an Attorney





From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.

Attorney Administration

Search: michael

Attorney ID	Last Name	First Name	Middle Name	Suffix	Title	Address	Active	Chairperson	Arbitrator
A66755	ADAMS	MICHAEL	J				✓		⚙️
A75904	ALFANO	MICHAEL	D				✓		⚙️
A78421	ALFANO	MICHAEL					✓		⚙️
A55079	ALFIERI	MICHAEL A.					✓		⚙️
A87474	ALIVERNINI	MICHAEL	J				✓		⚙️

Step-by-step

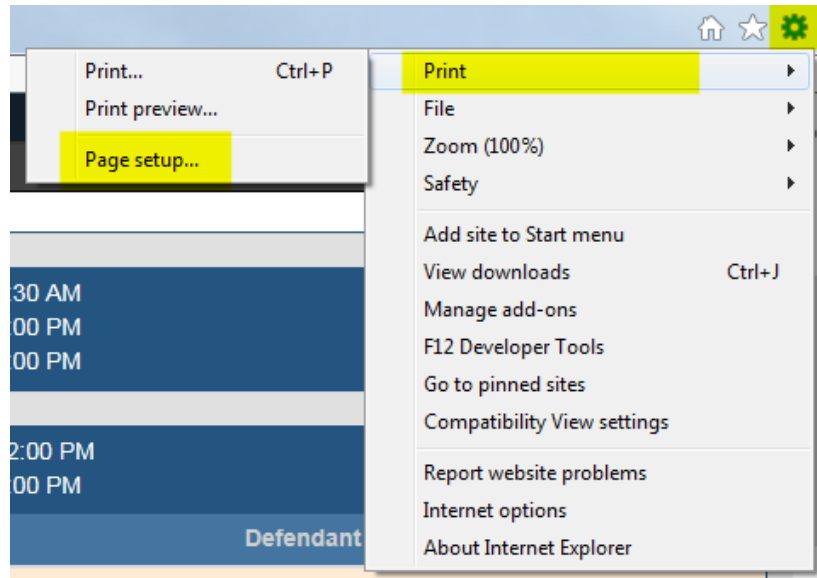
1. Enter either all or part of the Attorney's First Name and Last Name, or the Attorney ID. Press <Enter> or select .
2. Select the  icon on a specific Attorney's grid line in the search results, then select .
3. Select  to confirm the Attorney deletion.

How to Print Background Colors from Schedules

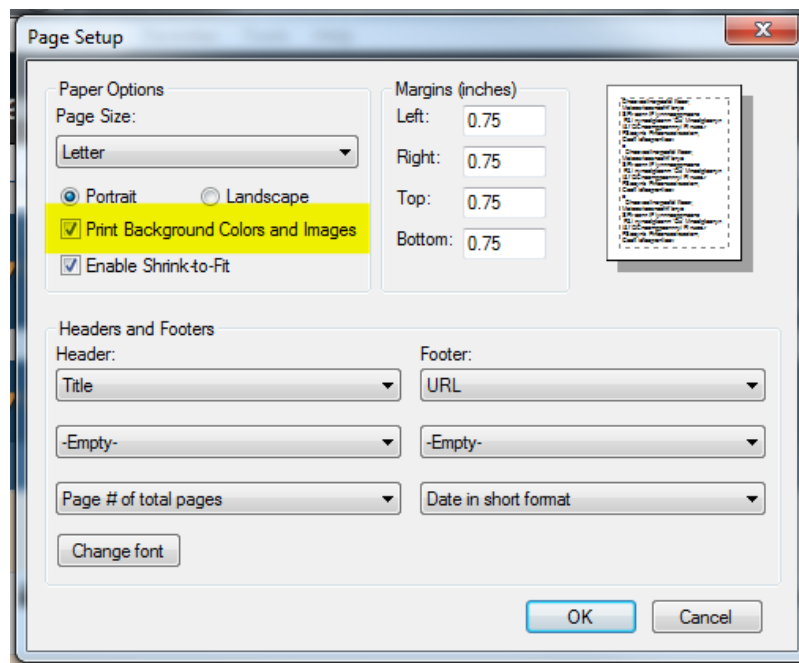
When printing out schedules, the background color appears in the Print Preview screen, but will not show on the printout unless the browser's print settings are modified.

1. Internet Explorer 11

- a. Select "Print > Page Setup..." from the Settings menu (cog):

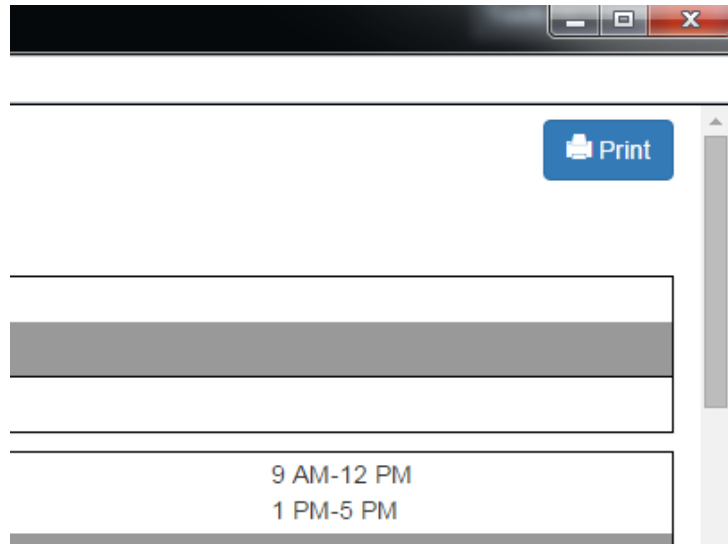


- b. Check the "Print Background Colors and Images" checkbox:

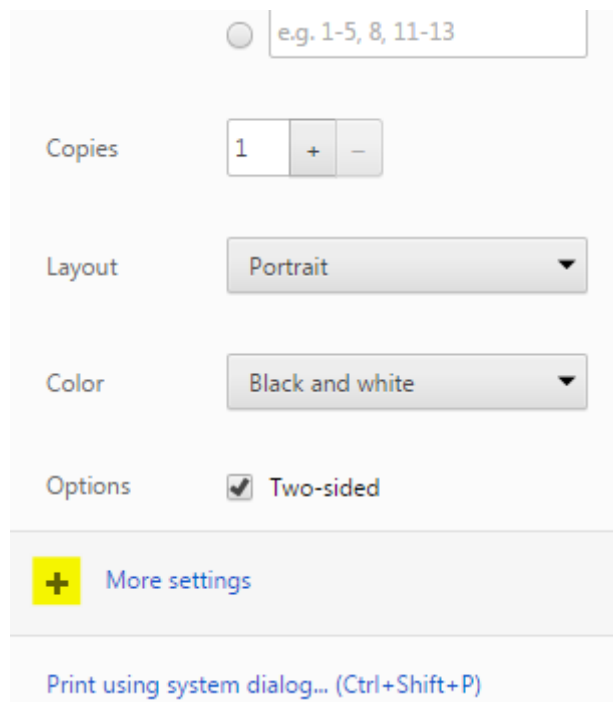


2. Chrome

- a. Click the "Print" button on the Schedule page (displays print preview)
- b. Click the "Print" button on the Print Preview:



- c. In the Chrome print dialog, click the + button next to the More Settings:



- d. Check the “Background Graphics” checkbox:

The image shows a print settings dialog box with the following options:

- Paper size: Letter
- Margins: Default
- Options:
 - Headers and footers
 - Two-sided
 - Background graphics (highlighted in yellow)

Below the options is a button labeled "Fewer settings" and a link "Print using system dialog... (Ctrl+Shift+P)".