

CourtRoom Program Tips

A short list of shortcuts and tips

Association of Towns

February, 2017



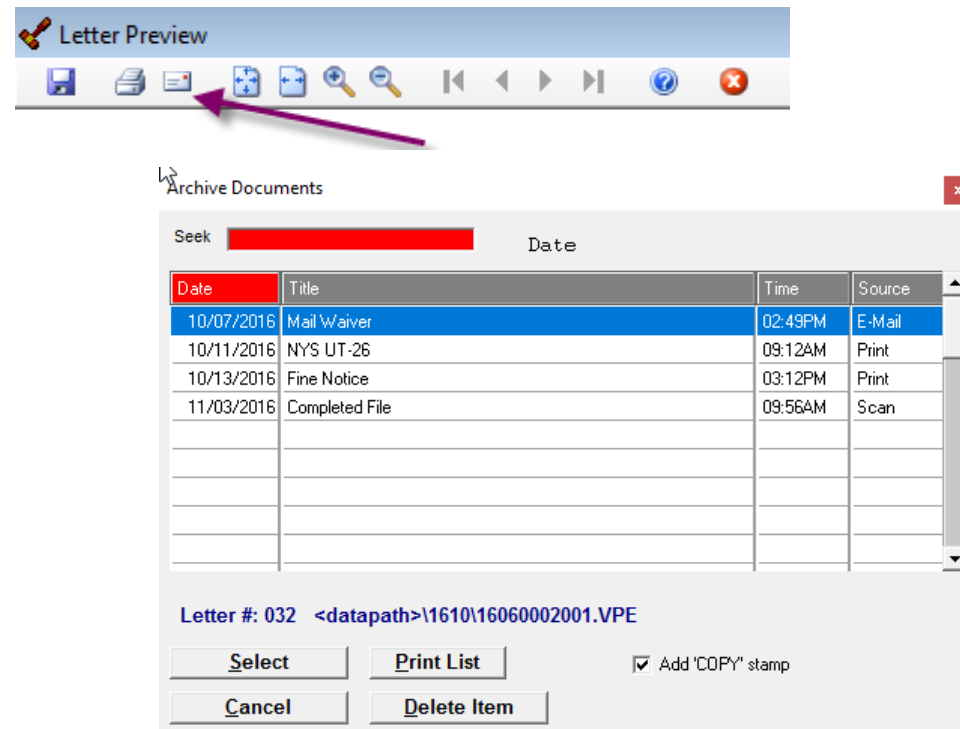
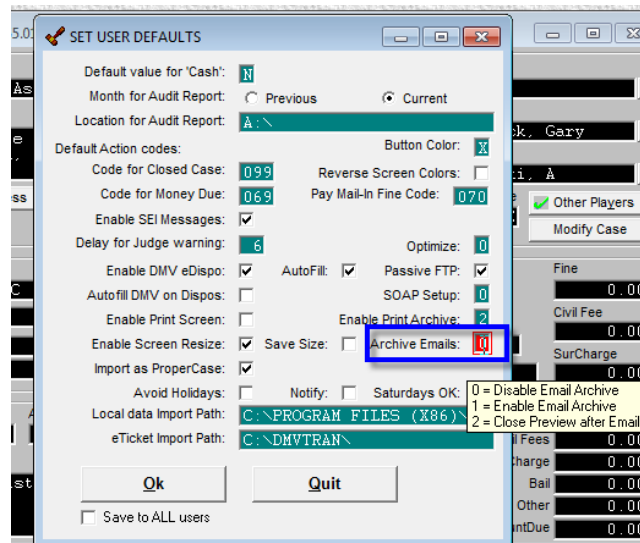
Service Education, Inc.
790 Canning Pkwy
Suite 1
Victor, NY 14564
585-264-9240
www.nycourts.us

Document Management

Archive letters - Save paper and time by archiving letters. Any letter printed from the program can be saved as an electronic file and retrieved from the case.

Email letters, reports and calendars - Any document you preview in CRP can be emailed. If it's case related, it can be added to archive list. Your default email must be Outlook – OCA will help set that up. Call our office for help enabling email archive.

Scan documents – Save case related documents you receive by scanning and then retrieving them from the Archive Documents list. A folder is created for scanning and saving Case Related documents scanned from within the program. We will help you create a list of frequently used document names so there is consistency in naming scanned documents. Scanning of documents that are not case related is not supported by SEi. Refer any questions or requests for help to your IT person or OCA Tech Support.



Scroll through cases - If you initially searched for a case by name, scroll through cases alphabetically.

If you searched on case number, scroll in case number order

Use PgUp to scroll forward in **ascending order** Use PgDown to scroll in **descending order**

Case Search Shortcuts - Any of the following searches work in the Name field using the special character as the first character in the field and entering your specific search Criteria

BIRTHDAY *12/20/1990

TICKET# @XXXXXXXXXX

RECEIPT # =123456

REFERENCE >MALL

COMPANY /BIG BUSINESS

Other Shortcuts - <F4> Inserts current date in Notes <F5> Opens auto data input in Notes

+ Inserts current date in an **empty** date field also

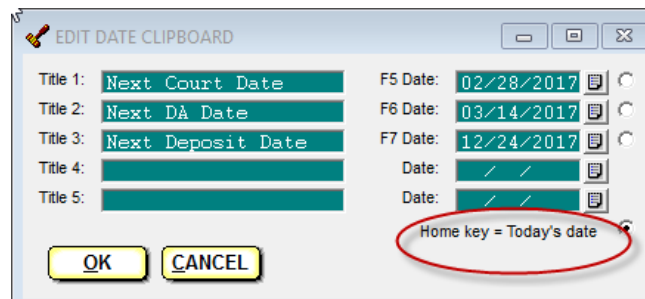
Increases date by 1 day at a time

- Decreases date field by 1 day at a time

<HOME> inserts today's date in date field

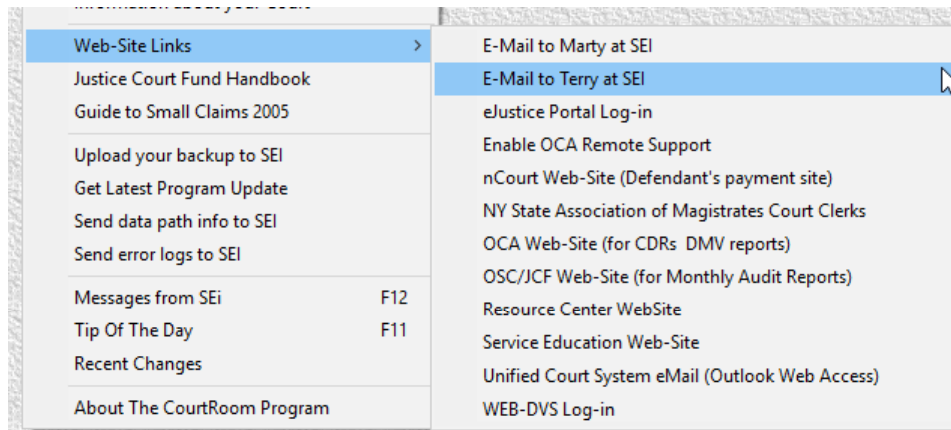
Date Clipboard - Utility->Edit Databases->Date Clipboard Each user can set keys for repetitive date entry.

Minimize and keep on screen for quick access. Change on a daily basis as needed.



Shortcut keys to replace use of the mouse – If you prefer using the keyboard (instead of the mouse) go to the SEi Website, (Help->Website Links->Service Education Website) On the left side of our main page, click HELP. Then click the link to Speed Keys for a complete listing. The list is printable.

Frequently used Website Links – Under HELP->Website Links we've included all the links you need for electronically reporting to OCA, JCF, DMV and others. This is much quicker than going to your browser to access the website(s).



Misc Shortcuts	. zipcode	In City field populates CSZ (.14450) Fairport, NY 14550
	.Badge	In Officer field populates officer
	C	On the Case Information screen opens Checkbook Records
	S	On the Case Information screen opens Case Search
	<TAB> or <ENTER>	moves cursor to the next field on the screen

DMV_Call Shortcut From a case information screen <F8> moves only that case into DMV_Call

Print all Case Histories for a defendant with multiple cases-

Import a new 'letter'

Click Utility->Edit Databases->Form Letter

Click New and respond to the prompt to add a new letter

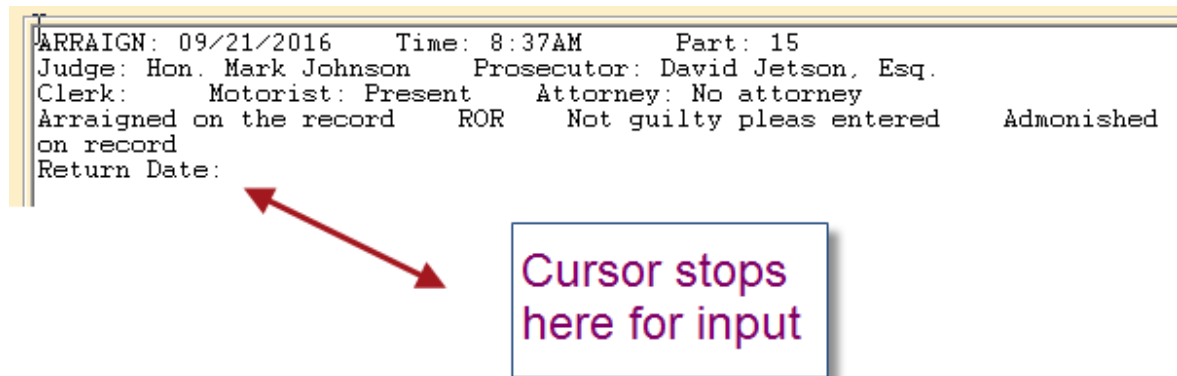
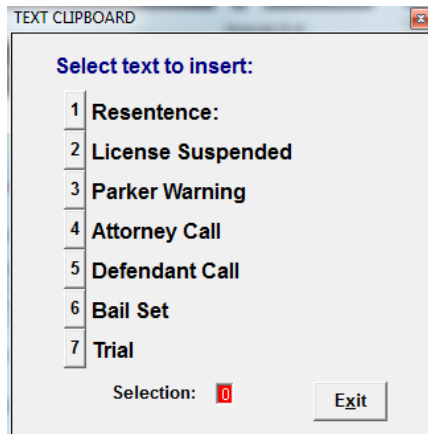
Click Import->Search SEi Website for Letters

In the seek box start typing CASE and select **CASE_HISTORIES.LTR**

Click Save/Exit

Select this as a letter from the case and all histories print for the defendant, provided the same name record was used when entering the case. *A new feature is the ability to keep a record on the case if a case history, TSLED Ticket or all case histories form was printed. The form will be added to your letter history and added into Notes. This can be turned off if you don't want the history.*

Boiler Plate Text – Eliminate repetitive typing and maintain consistency by setting up a file of commonly used entries into notes. SEi will help you setup your Boiler Plate file (in Notepad). In Notes, press <F5> to display the menu. Pick your item and the corresponding text will fill in Notes. The text is determined by you and can be designed to fit your needs.

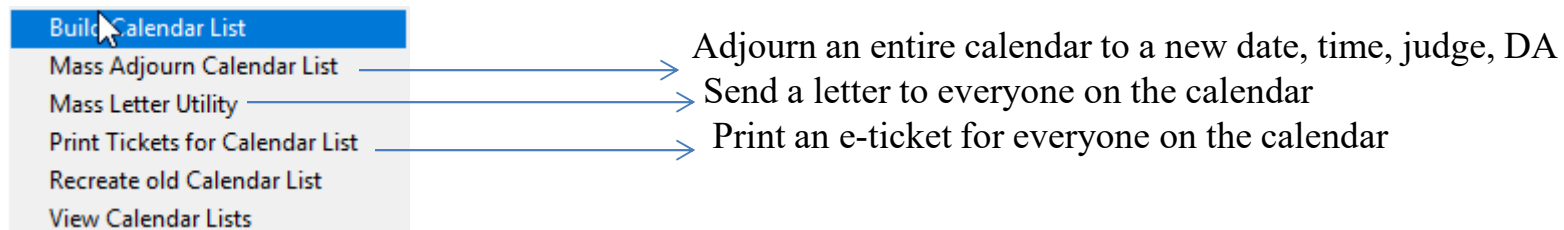


CALENDARS – There are so many different calendars it would take a whole class to go through them all. There are calendars that just show the name and charge(s), there are calendars that show the attorney of record, there is a calendar that prints the Motorist ID....you name it, there's probably a calendar that gives you all the information you want. Because there are so many versions, it's probably best to give our office a call and let us help you find the one you need.

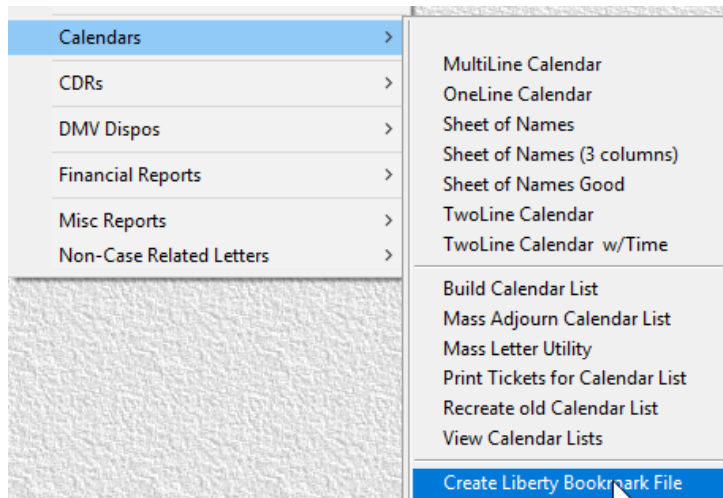
CALENDAR USES- Calendars can be used for more than just a listing of who is coming into court. For example, you can build a calendar of everyone who has a bench warrant or an arrest warrant – provided you've adjourned the case with one of those action codes. You can build a calendar listing scofflaws, or 1st appearance no shows. These special calendars are all created using combinations of action codes and exact date match. Please call our office for help creating special calendars.

DMV_Call – Import the court calendar file into DMV_Call for quick Compass abstract searches

OTHER CALENDAR FEATURES



Liberty Bookmark - After creating the court calendar the calendar file can easily be transferred to your Liberty Recording software. Depending on your configuration, it can be done either through your network server or using a flash drive.



Use this file in the Liberty Court Recorder program as follows:

TOOLS -> PREDEFINED BOOKMARKS

On the Bookmarks screen select:

FILES -> OPEN

Browse to your data folder and select the 'Liberty.xml' file.

THE END

Thank you for inviting me
to present at your class
Marty