

Faccts Users Setup
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Rev 1.

7-31-2013

1. The List Provides a List of All Users. A filter is not required.

2. Administrators can add or remove USERS from the list and the system

3. A Detail Window will permit three views for each user selected, Profile, Availability and User Role.

4. Users can Save changes below.

NOTE 1:
The Detail view of the Profile is visible for the **Administrator Users** and the **User Selected**.

NOTE 2:
The CLETS Certified Check box is read only, and not available for USER Self Selection.

Family Court Case Tracking System

Case Status | Case Record | Court Docket | Court Orders | **Court Staff** | Court Settings

User Login: smyles@court.com | QUIT

FACCTS User List (1)


- Sophia Myles
- Pascale Hutton
- Ray Stevenson
- Amy Smart

Profile | Availability | User Role

First Name: Sophia
Middle Name: Jane
Last Name: Myles

User ID: Sophia Myles
User Email: sophia@court.gov
User Phone: 123-123-1234

User CLETS Certified ☒

User Picture: 
Click Update to Change
UPDATE

ADD STAFF REMOVE USER (2) | SAVE (4)

1. The Availability Pane allows the user to set their current availability and to select a substitute user from a list of users.

2. Currently the user can select from any user role, although practically they would select from the roles equal or higher to them.

3. The list will highlight the selected current USER selected. Remove or Assign will change the selection to the new selected substitute.

The screenshot displays the 'Family Court Case Tracking System' interface. At the top, a navigation bar includes tabs for 'Case Status', 'Case Record', 'Court Docket', 'Court Orders', 'Court Staff', and 'Court Settings'. The 'Court Staff' tab is active. On the right side of the header, there is a 'User Login' field with the email 'smyles@court.com' and a 'QUIT' button.

The main content area is divided into two panes. The left pane, titled 'FACCTS User List', contains a list of users: 'Sophia Myles' (highlighted in blue), 'Pascale Hutton', 'Ray Stevenson', and 'Amy Smart'. The right pane, titled 'Availability', has sub-tabs for 'Profile', 'Availability', and 'User Role'. The 'Availability' sub-tab is selected. It features a checkbox labeled 'User Available' which is checked, marked with a blue diamond and the number 1. Below this is a 'Select Substitute' section, marked with a blue diamond and the number 2. This section includes a dropdown menu currently showing 'Administrator', a list of users with 'Sophia Myles' and 'Amy Smart' visible, and 'ASSIGN' and 'REMOVE' buttons. The user 'Amy Smart' is highlighted in the list, marked with a blue diamond and the number 3.

At the bottom of the interface, there are three buttons: 'ADD STAFF', 'REMOVE USER', and 'SAVE'.

1. The User Role Pane allows the administrator to Assign the USER a role, Active the CLETS certification FLAG. The ACTIVATED FLAG indicates that the USER has setup a password and responded to the invite EMAIL.

More on this later - see
ADDING Users .

2. Currently the user can select from any user role, although practically they would select from the roles equal or higher to them.

3. The list will highlight the selected current USER selected. Remove or Assign will change the selection to the new selected substitute.

The screenshot displays the 'Family Court Case Tracking System' interface. At the top, a navigation bar includes tabs for 'Case Status', 'Case Record', 'Court Docket', 'Court Orders', 'Court Staff', and 'Court Settings'. The 'Court Staff' tab is active. On the right side of the header, there is a 'User Login' field with the email 'smyles@court.com' and a 'QUIT' button.

The main content area is divided into two panels. The left panel, titled 'FACCTS User List', contains a list of users: 'Sophia Myles', 'Pascale Hutton', 'Ray Stevenson' (highlighted with a blue background), and 'Amy Smart'. The right panel, titled 'User Role', shows the configuration for the selected user, 'Ray Stevenson'. It includes a profile picture, a 'Court Staff' dropdown menu set to 'Ray Stevenson', a 'Date Created' field with the value '07-25-2013', a 'User Role' dropdown menu set to 'Courtroom Clerk', and two checked checkboxes: 'CLETS Certified' and 'Activated'. A blue diamond with the number '1' is overlaid on the 'Activated' checkbox.

At the bottom of the interface, there are three buttons: 'ADD STAFF', 'REMOVE USER', and 'SAVE'.

1. Administrative Users will have a User Configuration Tool. This can be in the same tab, or a separate module, however the setup and operation will be the same.

2. From the List of Roles they can see the

3. Role Setup Detail and Configure FACCTS for their courtroom.

The ADMIN functions can be seen here.

4. The User Configuration panel will need an update button of it's own.

NOTE:

Case Import is not initially supported and can be disabled until the software can support it.

Family Court Case Tracking System

User Login: smyles@court.com QUIT

Case Status Case Record Court Docket Court Orders Court Staff Court Settings

FACCTS User List

- Sophia Myles
- Pascale Hutton
- Ray Stevenson
- Amy Smart

User Configuration

Profile Availability User Role

Administrator

Case Status

- ☒ View Only
- ☒ Export
- ☐ Import

Case Record

- ☒ View Only
- ☒ Edit and Save

Case Docket

- ☒ View Only
- ☒ Schedule Docket

Court Orders

- ☒ View Only
- ☒ Edit and Save
- ☒ Unsign

Administration

- ☒ User Setup
- ☒ Court Setup

UPDATE

ADD STAFF REMOVE USER SAVE

1. Judicial Officer roles are shown here.

NOTE: Text will detail the roles on a later page.

NOTE 2:
SIGN an order means to issue that as an ORDER and LOCK it from editing, until a hearing, or UNSIGNED by the authorized user.

Family Court Case Tracking System

User Login: smyles@court.com QUIT

Case Status | Case Record | Court Docket | Court Orders | **Court Staff** | Court Settings

FACCTS User List

- Sophia Myles
- Pascale Hutton
- Ray Stevenson
- Amy Smart

User Configuration

Profile | Availability | **User Role**

User Details:

- Court Staff: Sophia Myles
- Date Created: 07-23-2013
- User Role: Administrator
- CLETS Certified: ☒
- Activated: ☒

Role List:

- Administrator
- Judicial Officer** (1)
- Courtroom Clerk
- Family Court Center
- Self Help Center
- Business Office

Permissions:

Judicial Officer

- Case Status:** ☒ View Only ☒ Export ☐ Import
- Case Record:** ☒ View Only ☒ Edit and Save
- Case Docket:** ☒ View Only ☒ Schedule Docket
- Court Orders:** ☒ View Only ☒ Edit and Save ☒ Sign and Unsign (2)

Buttons: ADD STAFF REMOVE USER SAVE

1. The Court Clerk User.

NOTE:

The Clerk can UNSIGN and order, but must return to the Judicial OFFICER for signing.

The screenshot displays the FACCTS User List and the User Configuration page for Sophia Myles. The interface includes a top navigation bar with tabs for Case Status, Case Record, Court Docket, Court Orders, Court Staff, and Court Settings. The Court Staff tab is active, showing the user's profile and configuration options. A blue diamond with the number 1 points to the 'Courtroom Clerk' role in the role list. A blue diamond with the number 2 points to the 'Unsign' checkbox in the Court Orders section of the User Configuration page.

FACCTS User List

Sophia Myles
Pascale Hutton
Ray Stevenson
Amy Smart

User Configuration

Courtroom Clerk

Case Status

<input checked="" type="checkbox"/> View Only	<input checked="" type="checkbox"/> Export	<input type="checkbox"/> Import
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Case Record

<input checked="" type="checkbox"/> View Only	<input checked="" type="checkbox"/> Edit and Save
---	---

Case Docket

<input checked="" type="checkbox"/> View Only	<input checked="" type="checkbox"/> Schedule Docket
---	---

Court Orders

<input checked="" type="checkbox"/> View Only	<input checked="" type="checkbox"/> Edit and Save	<input checked="" type="checkbox"/> Unsign
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ADD STAFF **REMOVE USER** **SAVE**

1. The Family Court Center User. These users enter CAsE Record, and schedule the case hearing for the PARTY's

The screenshot displays the 'Family Court Case Tracking System' interface. At the top, there is a navigation bar with tabs for 'Case Status', 'Case Record', 'Court Docket', 'Court Orders', 'Court Staff', and 'Court Settings'. The 'Court Staff' tab is currently selected. In the top right corner, the 'User Login' field shows 'smyles@court.com' and a 'QUIT' button.

On the left side, there is a 'FACCTS User List' panel. It contains a list of users: 'Sophia Myles' (highlighted in blue), 'Pascale Hutton', 'Ray Stevenson', and 'Amy Smart'.

The main area of the interface is divided into two sections. The left section shows the user's profile for 'Sophia Myles', including a photo, 'Court Staff' name, 'Date Created' (07-23-2013), 'User Role' (Administrator), and checkboxes for 'CLETS Certified' and 'Activated'. Below this is a list of roles: 'Administrator', 'Judicial Officer', 'Courtroom Clerk', 'Family Court Center' (highlighted in blue with a blue diamond containing the number 1), 'Self Help Center', and 'Business Office'.

The right section is titled 'User Configuration' and contains a 'Family Court Center' section with three sub-sections: 'Case Status' (with checkboxes for 'View', 'Export', and 'Import'), 'Case Record' (with checkboxes for 'View' and 'Edit and Save'), and 'Case Docket' (with checkboxes for 'View' and 'Schedule Docket').

At the bottom of the interface, there are three buttons: 'ADD STAFF', 'REMOVE USER', and 'SAVE'.

1. The Family Self Help Center.
These users help the PARTY's
enter the DATA themselves at
a selected Self Help Location.

NOTE: They do not schedule
the DOCKET, but can view it.

The screenshot displays the 'Family Court Case Tracking System' interface. At the top, there is a navigation bar with tabs: Case Status, Case Record, Court Docket, Court Orders, Court Staff, and Court Settings. The 'Court Staff' tab is selected. In the top right corner, the 'User Login' field shows 'smyles@court.com' and a 'QUIT' button.

The main content area is divided into three sections:

- FACCTS User List:** A list of users on the left, with 'Sophia Myles' selected. The list includes: Sophia Myles, Pascale Hutton, Ray Stevenson, and Amy Smart.
- User Profile:** A central section for the selected user, Sophia Myles. It includes a profile picture, 'Court Staff' name, 'Date Created' (07-23-2013), 'User Role' (Administrator), and checkboxes for 'CLETS Certified' and 'Activated', both of which are checked.
- User Configuration:** A section on the right titled 'User Configuration' with a sub-section 'Self Help Center'. It contains three groups of settings:
 - Case Status:** 'View' is checked, 'Export' and 'Import' are unchecked.
 - Case Record:** 'View' and 'Edit and Save' are both checked.
 - Case Docket:** 'View' is checked.


At the bottom of the interface, there are three buttons: 'ADD STAFF', 'REMOVE USER', and 'SAVE'. A blue diamond with the number '1' points to the 'Self Help Center' section in the User Configuration area.

1. The Court Business Center.
Mostly where attorneys (not working for the Court but the Party's) collect Paperwork.
Some users here may help the Attorneys look up matters on the CASE RECORD.

NOTE: The Attorney's may update the CASE RECORD if they are newly assigned or some data changes so the EDIT function is needed for the Business Center user, for the CASE RECORD.

The screenshot displays the 'Family Court Case Tracking System' interface. The top navigation bar includes tabs for 'Case Status', 'Case Record', 'Court Docket', 'Court Orders', 'Court Staff', and 'Court Settings'. The 'Court Staff' tab is active, showing a 'User Login' field with 'smyles@court.com' and a 'QUIT' button. The main content area is divided into three sections: 'FACCTS User List', 'User Profile', and 'User Configuration'. The 'FACCTS User List' on the left lists users: Sophia Myles (highlighted), Pascale Hutton, Ray Stevenson, and Amy Smart. The 'User Profile' section in the center shows details for Sophia Myles, including her photo, 'Court Staff' name, 'Date Created' (07-23-2013), 'User Role' (Administrator), and checkboxes for 'CLETS Certified' and 'Activated'. Below this is a list of roles: Administrator, Judicial Officer, Courtroom Clerk, Family Court Center, Self Help Center, and Business Office (highlighted with a blue diamond labeled '1'). The 'User Configuration' section on the right shows settings for the 'Business Office' role, with checkboxes for 'Case Status' (View) and 'Case Record' (View and Edit and Save). A blue diamond labeled '2' is placed over the 'Edit and Save' checkbox. At the bottom, there are buttons for 'ADD STAFF', 'REMOVE USER', and 'SAVE'.

FACCTS User List
Sophia Myles
Pascale Hutton
Ray Stevenson
Amy Smart

User Profile

Court Staff: Sophia Myles
Date Created: 07-23-2013
User Role: Administrator
CLETS Certified: <input checked="" type="checkbox"/>
Activated: <input checked="" type="checkbox"/>
Administrator
Judicial Officer
Courtroom Clerk
Family Court Center
Self Help Center
Business Office

User Configuration
Business Office
Case Status: <input checked="" type="checkbox"/> View
Case Record: <input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit and Save

ADD STAFF REMOVE USER SAVE

Data elements for the User Configuration Panels

This may be helpful in development...

```
<userconfiguration>
  <administration>
    <casestatusview>true</casestatusview>
    <casestatusexport>true</casestatusexport>
    <casestatusimport>false</casestatusimport>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
    <casedocketview>true</casedocketview>
    <casedocketschedule>true</casedocketschedule>
    <courtorderview>true</courtorderview>
    <courtorderedit>true</courtorderedit>
    <courtorderunsign>true</courtorderunsign>
    <adminuser>true</adminuser>
    <admincourt>true</admincourt>
  </administration>
  <judicialofficer>
    <casestatusview>true</casestatusview>
    <casestatusexport>true</casestatusexport>
    <casestatusimport>false</casestatusimport>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
    <casedocketview>true</casedocketview>
    <casedocketschedule>true</casedocketschedule>
    <courtorderview>true</courtorderview>
    <courtorderedit>true</courtorderedit>
    <courtorderunsign>true</courtorderunsign>
  </judicialofficer>
  <courtclerk>
    <casestatusview>true</casestatusview>
    <casestatusexport>true</casestatusexport>
    <casestatusimport>false</casestatusimport>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
    <casedocketview>true</casedocketview>
    <casedocketschedule>true</casedocketschedule>
    <courtorderview>true</courtorderview>
    <courtorderedit>true</courtorderedit>
    <courtorderunsign>true</courtorderunsign>
  </courtclerk>
```

```
<userconfiguration>....
  <familycourt>
    <casestatusview>true</casestatusview>
    <casestatusexport>true</casestatusexport>
    <casestatusimport>false</casestatusimport>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
    <casedocketview>true</casedocketview>
    <casedocketschedule>true</casedocketschedule>
  </familycourt>
  <selfhelp>
    <casestatusview>true</casestatusview>
    <casestatusexport>false</casestatusexport>
    <casestatusimport>false</casestatusimport>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
    <casedocketview>true</casedocketview>
  </selfhelp>
  <businessoffice>
    <casestatusview>true</casestatusview>
    <caserecordview>true</caserecordview>
    <caserecordedit>true</caserecordedit>
  </businessoffice>
  <default/>
</userconfiguration>
```

Adding A User In the Application

This may be helpful in development...

1. Click ADD STAFF (USER)

2. Enter the NAME data and EMAIL Address to invite the NEW USER to activate the ACCOUNT with a PASSWORD.

The screenshot shows the 'Family Court Case Tracking System' interface. The 'Add New User' dialog box is open, showing fields for User - First Name (Amber), User - Middle Name (Lynn), User - Last Name (Heard), and User - Email Address (amber@court.gov). A red asterisk indicates the email address is required. A blue arrow points from the 'ADD NEW FACCTS USER' button to the 'ADD STAFF' button in the bottom left corner. A blue arrow points from the 'ADD NEW FACCTS USER' button to the 'ADD STAFF' button in the bottom left corner.

3. ADD USER creates a NEW USER partially completed. DATA SET, ADDS USER TO THE LIST.

4. Once the New USER logs in they can add the details to the profile and availability.

The screenshot shows the 'Family Court Case Tracking System' interface. The 'User Configuration' page is open, showing the 'Profile' tab. Fields include First Name (Amber), Middle Name (Lynn), Last Name (Heard), User ID (Amber Heard), User Email (amber@court.gov), User Phone, and User CLETS Certified (checkbox). A blue arrow points from the 'ADD NEW FACCTS USER' button to the 'ADD STAFF' button in the bottom left corner. A blue arrow points from the 'ADD NEW FACCTS USER' button to the 'ADD STAFF' button in the bottom left corner.

Data Set for the New User...and User Profile May help in development

Newly Created User - "barebones" account

```
<user5 modifyme="yes">
  <userid>Amber Heard</userid>
  <firstname>Amber</firstname>
  <middlename>Lynn</middlename>
  <lastname>Heard</lastname>
  <createdate active="no">07-31-2013</createdate>
  <password></password>
  <userrole></userrole>
  <substitute></substitute>
  <userphone></userphone>
  <useremail>amber@court.gov</useremail>
  <userclets>no</userclets>
  <userimage></userimage>
  <useravailable>no</useravailable>
</user5>
```

• Account Not Active, yet by USER.

• State of User Account...UPDATE, new Password or Activation

Established User

```
<user1 modifyme="no">
  <userid>Sophia Myles</userid>
  <firstname>Sophia</firstname>
  <middlename>Jane</middlename>
  <lastname>Myles</lastname>
  <createdate active="yes">01-21-2013</createdate>
  <password>.....</password>
  <userlogin>yes</userlogin>
  <userrole>0</userrole>
  <substitute>1</substitute>
  <userphone>123-123-1234</userphone>
  <useremail>sophia@court.gov</useremail>
  <userclets>yes</userclets>
  <userimage>/user/jamesreid/dev/_images/sophia.jpg</userimage>
  <useravailable>yes</useravailable>
</user1>
```

• LOGIN STATUS BOOL, prevents >1 logins.