Faccts Users Setup
James Reid
Rev 1.

7-31-2013
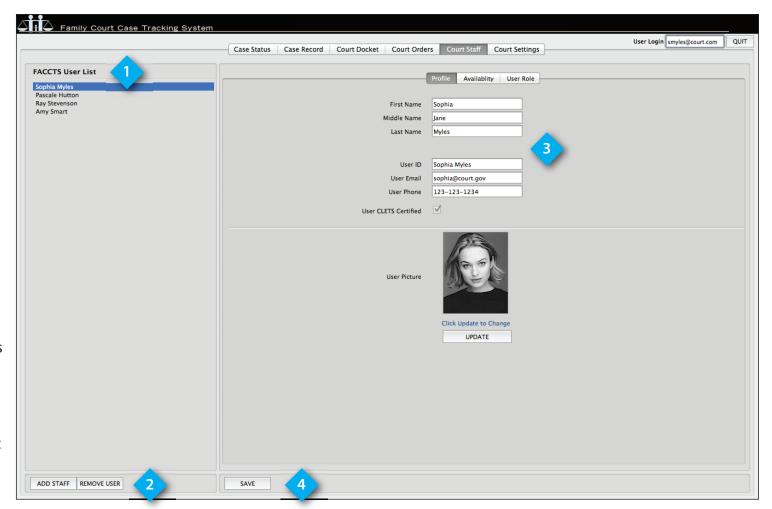
1. The List Provides a List of All Users. A filter is not required.

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.
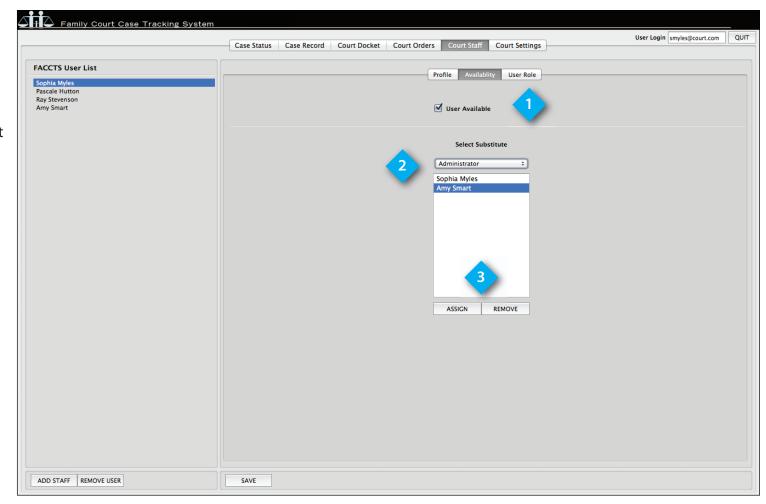
4. Users can Save changes below.

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 avilable for USER Self Selection.

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   1

Sophia Myles
Pascale Hutton
Ray Stevenson
Amy Smart

Profile | Availablity | 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 ☑

3

User Picture

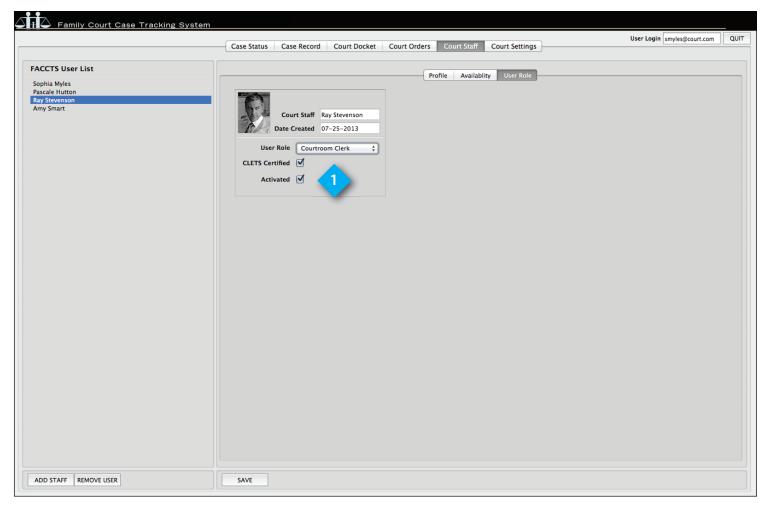Click Update to Change
UPDATE

ADD STAFF | REMOVE USER   2

SAVE   4

1. The Availability Pane allows the user to set their current avialbility 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.

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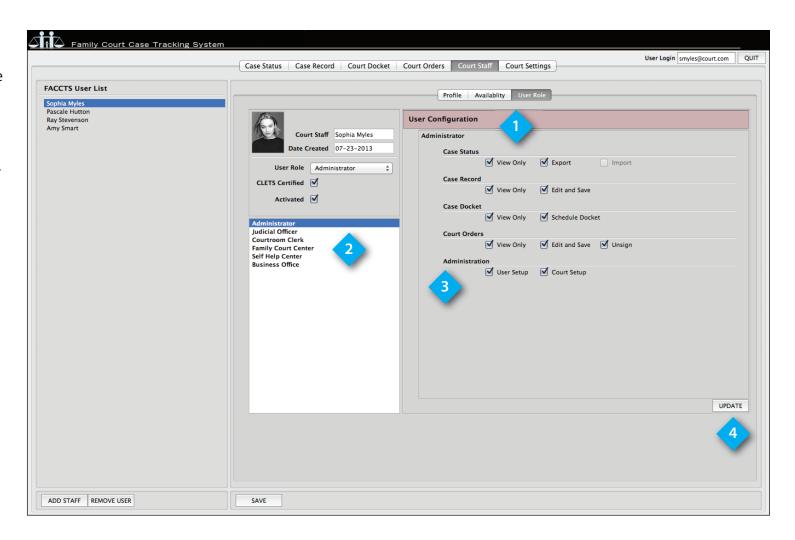
1. Administrative Users will have a User Configuration Tool. This can be in the same tab, or a seperate module, however the setup and operation will be the same.

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

Profile   Availablity   User Role

Court Staff   Sophia Myles
Date Created   07-23-2013

User Role   Administrator
CLETS Certified ☑
Activated ☑

Administrator
Judicial Officer
Courtroom Clerk
Family Court Center
Self Help Center
Business Office

User Configuration   **1**

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
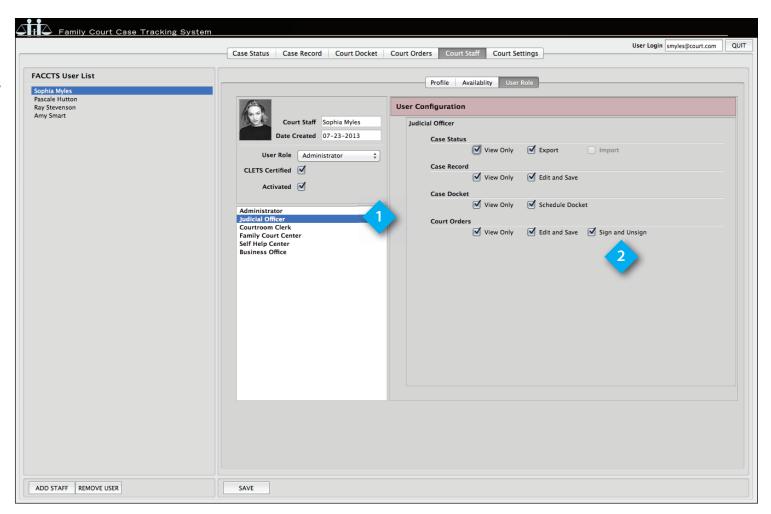
2

3

UPDATE

4

ADD STAFF   REMOVE USER

SAVE

1. Judicial Officer roles are shown here.
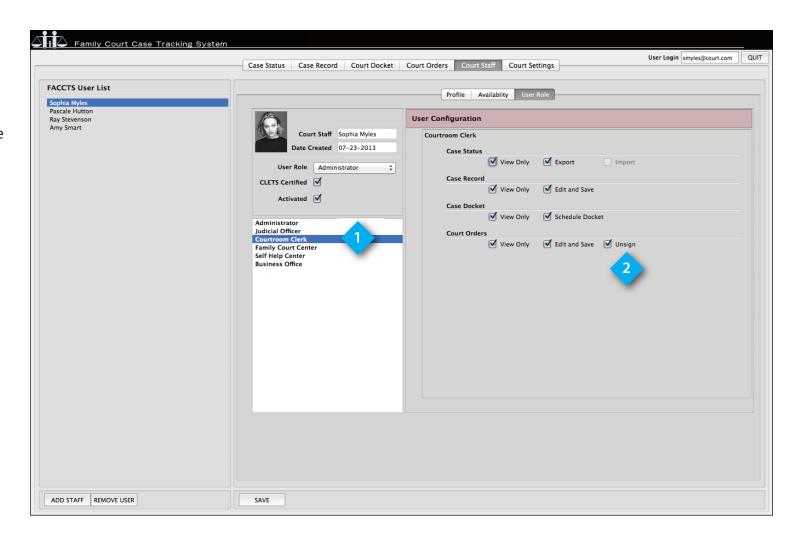
NOTE: Text will detail the roles on a later page.

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

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

FACCTS User List

Sophia Myles
Pascale Hutton
Ray Stevenson
Amy Smart

Profile   Availablity   User Role

Court Staff   Sophia Myles
Date Created   07-23-2013

User Role   Administrator
CLETS Certified   ☑
Activated   ☑

Administrator
Judicial Officer   ① 1
Courtroom Clerk
Family Court Center
Self Help Center
Business Office

User Configuration

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
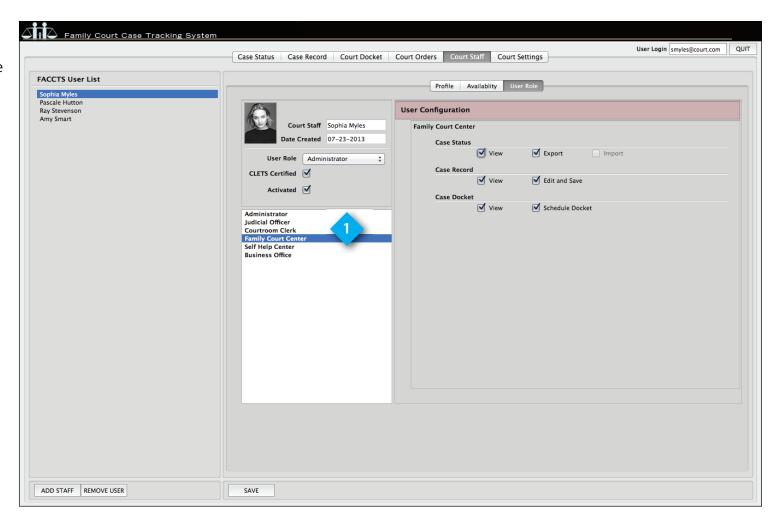
② 2

ADD STAFF   REMOVE USER   SAVE

1. The Court Clerk User.

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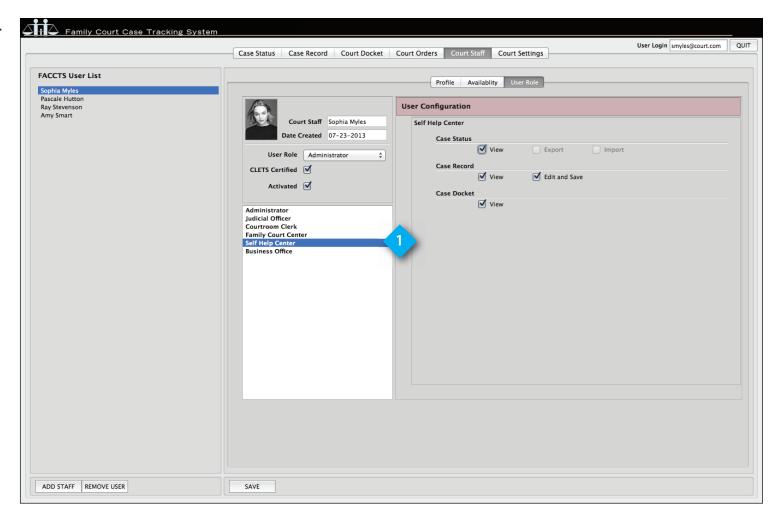The Clerk can UNSIGN and order, but must return to the Judical OFFICER for signing.

1. The Family Court Center User. These users enter CAse Record, and schedule the case hearing for the PARTY's
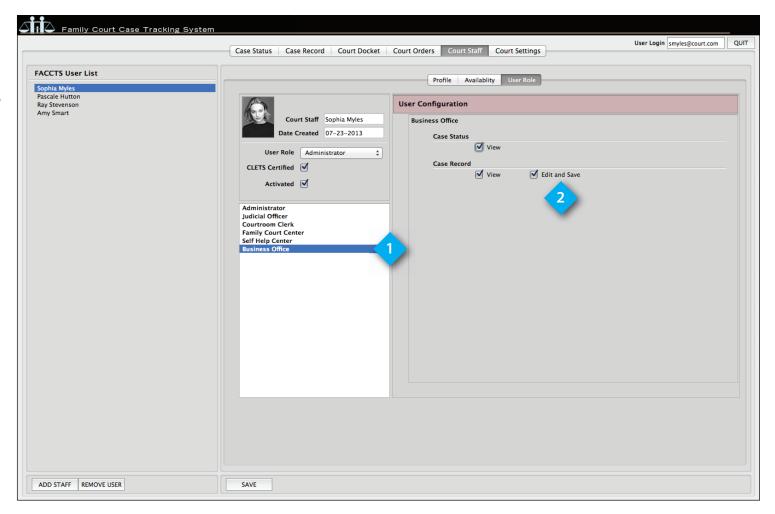
1. The Family Self Help Center. These users help the PARTY's enter the DATA themselves at a selected Self Help Location.

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

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

Profile | Availablity | User Role

Court Staff Sophia Myles
Date Created 07-23-2013

User Role Administrator ⇕
CLETS Certified ☑
Activated ☑

Administrator
Judicial Officer
Courtroom Clerk
Family Court Center
Self Help Center
Business Office

User Configuration

Self Help Center

Case Status
☑ View   ☐ Export   ☐ Import

Case Record
☑ View   ☑ Edit and Save

Case Docket
☑ View

1

ADD STAFF | REMOVE USER   SAVE

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.

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>
```
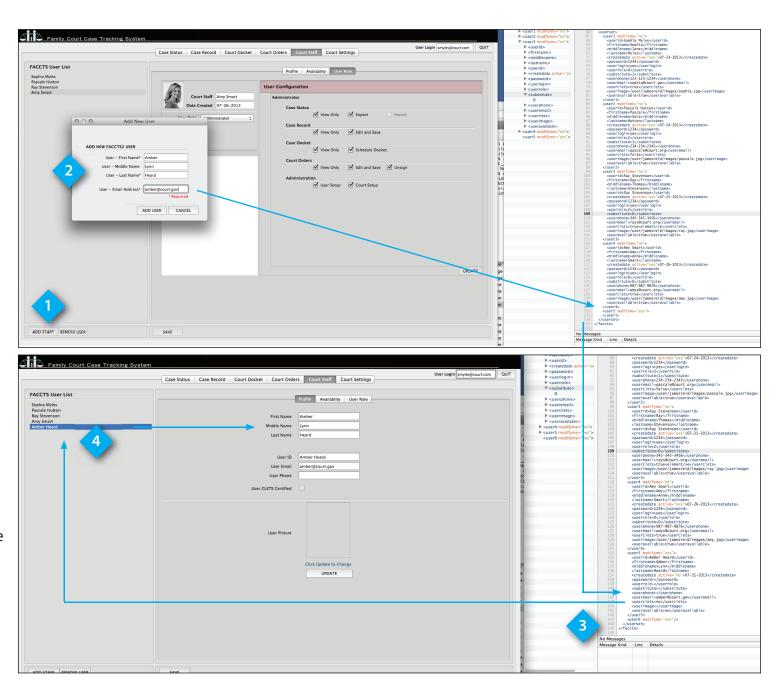
Adding A User In the Application

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.

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 avaiability.

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

Newly Created User - "barebones" account

```xml
<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>
```

Established User

```xml
<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.

Account Not Active, yet by USER.

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