

# Court Visitor App - User Manual

Complete guide for the Court Visitor App - Your 14-step workflow automation tool

## Table of Contents

1. [Getting Started](#getting-started)
2. [14-Step Workflow](#14-step-workflow)
3. [Quick Access Tools](#quick-access-tools)
4. [Troubleshooting](#troubleshooting)
5. [Tips & Best Practices](#tips--best-practices)

## Getting Started

### How to Launch the App

#### Option 1: Desktop Shortcut

- Double-click `Court Visitor App.bat` on your desktop

#### Option 2: From App Folder

- Navigate to: `C:\GoogleSync\GuardianShip\_Easy\_App\GuardianShip\_App\`
- Double-click `launch\_app.bat`

#### Option 3: Command Line

```
cd C:\GoogleSync\GuardianShip_Easy_App\GuardianShip_App
```

```
python guardianship_app.py
```

### First Time Setup

6. Ensure all your automation scripts are in place
7. Verify the Excel database exists: `App Data\ward\_guardian\_info.xlsx`
8. Check that the "New Files" folder exists for PDF processing

## 14-Step Workflow

### Initial Setup (Steps 1-7)

#### *Step 1: Process New Cases*

**What it does:** Extracts data from ORDER.pdf and ARP.pdf files using OCR and updates the Excel database.

#### How to use:

9. Place ORDER.pdf and ARP.pdf files in: `C:\GoogleSync\GuardianShip\_Easy\_App\New Files\`
10. Click "Process PDFs" button
11. Wait for processing to complete (watch the output window)
12. Check Excel file for extracted data

**Script:** `guardian\_extractor\_claudecode20251023\_bestever\_11pm.py`

#### What gets extracted:

- Ward information (name, DOB, address)
- Guardian information (name, DOB, phone, email, address)
- Court information (cause number, court number, judge)
- Dates (ARP filed date, order signed date)

### *Step 2: Organize Case Files*

**What it does:** Creates folder structure for each case and moves PDFs to appropriate folders.

**How to use:**

13. Ensure Step 1 is complete
14. Click "Organize Files" button
15. Verify folders were created in "Guardian Folders" directory

**Script:** `Automation/Create CV report\_move to  
folder/Scripts/build\_cvr\_from\_excel\_cc\_working.py`

### *Step 3: Generate Route Map*

**What it does:** Creates a map showing ward locations for visit planning.

**How to use:**

16. Ensure ward addresses are in Excel
17. Click "Create Map" button
18. Map will be generated showing all ward locations

**Script:** `Automation/Build Map Sheet/Scripts/build\_map\_sheet.py`

#### *Step 4: Send Meeting Requests*

**What it does:** Sends initial meeting request emails to guardians.

**How to use:**

19. Review guardian email addresses in Excel
20. Click "Send Requests" button
21. Email templates will be used to send meeting requests

**Script:** `Automation/Email Meeting Request/scripts/send\_guardian\_emails.py`

#### *Step 5: Add Contacts*

**What it does:** Adds guardians and wards to your contact list.

**How to use:**

22. Ensure guardian/ward information is in Excel
23. Click "Add Contacts" button
24. Contacts will be added to your system

**Script:** `Automation/Contacts - Guardians/scripts/add\_guardians\_to\_contacts.py`

#### *Step 6: Confirm Appointment*

**What it does:** Sends appointment confirmation emails to guardians.

**How to use:**

25. After scheduling appointments
26. Click "Send Confirmation" button
27. Confirmation emails will be sent

**Script:** `Automation/Appt Email Confirm/scripts/send\_confirmation\_email.py`

***Step 7: Schedule Calendar***

**What it does:** Adds appointments to Google Calendar.

**How to use:**

28. Ensure appointment dates/times are set
29. Click "Schedule" button
30. Calendar events will be created

**Script:** `Automation/Calendar appt send email conf/scripts/create\_calendar\_event.py`

***Visit & Follow-up (Steps 8-14)***

***Step 8: Generate CVR***

**What it does:** Creates Court Visitor Report (CVR) document templates for each case.

**How to use:**

31. Click "Generate CVR" button
32. CVR templates will be created in case folders

**Script: `Automation/Create CV report\_move to folder/Scripts/build\_cvr\_from\_excel\_cc\_working.py`**

***Step 9: Visit Summary***

**What it does:** Creates one-page visit summary sheets.

**How to use:**

33. After completing visits
34. Click "Generate Summary" button
35. Summary sheets will be created

**Script: `Automation/Court Visitor Summary/build\_court\_visitor\_summary.py`**

***Step 10: Complete CVR***

**What it does:** Fills CVR documents with data from Google Forms.

**How to use:**

36. Ensure Google Form data is available
37. Click "Complete CVR" button
38. CVR documents will be populated

**Script: `google\_sheets\_cvr\_integration\_fixed.py`**

***Step 11: Send Follow-up***

**What it does:** Sends follow-up emails to guardians (thank you notes, additional requests).

**How to use:**

39. Select cases needing follow-up
40. Click "Send Follow-up" button
41. Choose recipients and send emails

**Script:** `Automation/TX email to guardian/send\_followups\_picker.py`

***Step 12: Email CVR***

**What it does:** Emails completed CVR documents to your supervisor.

**How to use:**

42. Ensure CVRs are complete
43. Click "Email CVR" button
44. CVRs will be sent to supervisor

**Script:** `email\_cvr\_to\_supervisor.py`

***Step 13: Payment Form***

**What it does:** Generates monthly payment reimbursement forms.

**How to use:**

45. Click "Generate Form" button
46. Payment forms will be created for the month

Script: `Automation/CV Payment Form Script/scripts/build\_payment\_forms\_sdt.py`

***Step 14: Mileage Log***

**What it does:** Generates monthly mileage reimbursement logs.

**How to use:**

47. Click "Generate Mileage" button
48. Mileage logs will be created for the month

Script: `Automation/Mileage Reimbursement Script/scripts/build\_mileage\_forms.py`

**Quick Access Tools**

The right sidebar provides quick access to common tools:

**Excel File**

- Opens the ward\_guardian\_info.xlsx database
- View/edit all extracted data

## **Guardian Folders**

- Opens the Guardian Folders directory
- Access all case folders and documents

## **Contacts**

- Opens Windows Contacts/People app
- Quick access to contact management

## **Email**

- Opens your default email client
- Quick access to email

## **Help**

- Shows quick help dialog
- Common troubleshooting tips

## **Manual**

- Opens this user manual
- Complete documentation

## **Troubleshooting**

### **App Won't Start**

**Problem: Double-clicking the launcher does nothing**

#### **Solutions:**

49. Check that Python is installed: `python --version`
50. Run from command line to see errors
51. Verify you're in the correct directory

52. Check for error messages in the console

### **Step Fails to Run**

**Problem:** Clicking a step button shows an error

#### **Solutions:**

53. Check that the automation script exists at the specified path
54. Verify required input files are present
55. Look at the output window for specific error details
56. Ensure Python dependencies are installed for that script
57. Try running the script directly to isolate the issue

### **No PDF Files Found (Step 1)**

**Problem:** "No PDF files found" message when processing

#### **Solutions:**

58. Check that PDFs are in: `C:\GoogleSync\GuardianShip\_Easy\_App\New Files\`
59. Verify files are named ORDER.pdf and ARP.pdf (or contain those words)
60. Make sure files are actual PDFs, not shortcuts or other file types

### **Excel File Not Found**

**Problem:** "Excel file not found" error

**Solutions:**

61. Run Step 1 to create the database
62. Check that folder exists: `C:\GoogleSync\GuardianShip\_Easy\_App\App Data\`
63. Verify Excel file hasn't been moved or renamed

**Script Output Window is Blank**

**Problem: Processing window opens but shows no output**

**Solutions:**

64. Wait - some scripts take time to start
65. Check that Python can run the script
66. Look for console errors
67. Verify script permissions

**Email/Calendar Steps Fail**

**Problem: Email or calendar automation doesn't work**

**Solutions:**

68. Check Google API credentials are set up
69. Verify internet connection
70. Check that email addresses are valid in Excel
71. Look for authentication errors in output window

## Tips & Best Practices

### Daily Workflow

- 72. Start each day: Process new PDFs (Step 1)
- 73. Follow the sequence: Steps are numbered in order for a reason
- 74. Check after each step: Verify output before moving to next step
- 75. Use Quick Access: Sidebar buttons save time for common tasks

### Data Quality

- 76. Review extracted data: Always check Excel after Step 1
- 77. Correct errors early: Fix typos in Excel before running other steps
- 78. Validate addresses: Ensure addresses are complete for mapping
- 79. Check email addresses: Verify guardian emails before sending

### File Organization

- 80. Clear New Files folder: After processing, move PDFs to case folders
- 81. Backup Excel regularly: Save copies of your database
- 82. Keep scripts untouched: The app calls your scripts - don't modify them
- 83. Organize by case: Use Guardian Folders structure

### Performance

- 84. One step at a time: Don't run multiple steps simultaneously
- 85. Watch the output: Processing windows show progress and errors
- 86. Be patient: OCR and document processing takes time
- 87. Close completed windows: Keep workspace clean

### Error Prevention

- 88. Check file paths: Ensure all automation scripts are in correct locations
- 89. Verify permissions: Make sure Python can read/write files
- 90. Test after updates: If you update a script, test it
- 91. Keep backups: Save working versions of scripts

### Monthly Tasks

- End of month: Run Step 13 (Payment Form) and Step 14 (Mileage Log)

- Archive completed cases: Move old cases to archive folder
- Backup Excel database: Save monthly snapshots
- Review automation logs: Check for recurring errors

## Keyboard Shortcuts

- Alt+F4 - Close current window
- Esc - Cancel current operation (when available)
- F1 - Open help (in processing windows)

## File Locations

### Main Application

- App: `C:\GoogleSync\GuardianShip\_Easy\_App\GuardianShip\_App\`
- Launcher: `C:\GoogleSync\GuardianShip\_Easy\_App\GuardianShip\_App\launch\_app.bat`

### Data Files

- Excel Database: `C:\GoogleSync\GuardianShip\_Easy\_App\App Data\ward\_guardian\_info.xlsx`
- New PDFs: `C:\GoogleSync\GuardianShip\_Easy\_App\New Files\`
- Case Folders: `C:\GoogleSync\GuardianShip\_Easy\_App\Guardian Folders\`

### Automation Scripts

- All automation: `C:\GoogleSync\GuardianShip\_Easy\_App\Automation\`
- Main extractor:  
`C:\GoogleSync\GuardianShip\_Easy\_App\guardian\_extractor\_claudecode20251023\_bestever\_11pm.py`

## **Support**

### **Getting Help**

92. Click the "Help" button (?) in the sidebar
93. Review this manual
94. Check the output window for specific error messages
95. Review the README.md file in the app directory

### **Reporting Issues**

When reporting problems, include:

- Which step was running
- Error messages from output window
- What you were trying to do
- What files were being processed

## **Version Information**

### **Court Visitor App v1.0**

- 14-step automated workflow
- All automation scripts connected
- No modifications to existing scripts
- Real-time output monitoring
- Integrated help system

## **Important Notes**

- NO SCRIPTS ARE MODIFIED - The app only calls your existing scripts
- All your working scripts remain untouched in their original locations
- The app is completely separate in the GuardianShip\_App folder
- Each step verifies the script exists before running
- Script output is displayed in real-time for monitoring

Last Updated: October 2024