PRETRIAL REALTIME INFORMATION SYSTEM MANAGER (PRISM)

Book III

Version 2.0 User Manual

("PRISM 2.9 .Net Migration" SOW edited version)

1.0 Maintenance 4
1.1 RA RCMD REL CONDITIONS 5
1.1.1 Link Release Conditions to a Risk Recommendation 5
1.2 RA RELEASE PROGRAMS 7
1.2.1 Associate a Release Program with a Risk Category 7
1.3 RECENT CASE ASSIGNMENTS 9
1.3.1 View Recent Case Assignments 9
1.4 ASSIGN CLIENT CASES 11
1.4.1 Assign a Client Case to a PSO 11
1.5 ASSIGN PSO CASES 13
1.5.1 Assign Cases to PSO 13
1.6 ALTERNATE CASE MANAGER 15
1.6.1 Temporarily Change a Case Manager 15
1.7 CASE ASSIGNMENT AUDIT 17
1.7.1 View Case Assignment History 17
1.8 LOOKUP LIST 19
1.8.1 Add Options to Lookup Name 19
1.8.2 Edit Lookup Name 21
1.8.3 Delete a Lookup Entry 21
1.9 REASSIGN CASES 23
1.9.1 Reassign a Case 23
1.10 ASSOCIATES LIST 24
1.10.1 Search for an Associate 24
1.10.2 Add a New Associate 24
1.10.2.1 Add Address and Communication Details 25
1.10.2.2 Add Associate Calendar Information 26
1.11 RELEASE ORDER TYPE 28
1.11.1 View and/or Edit a Release Program 28
1.11.1.1 Link a Release Type to a Release Program 29
1.11.2 Add a Release Program 30
1.12 RELEASE CONDITIONS 31
1.12.1 Add a Release Condition 31
1.13 PROGRAM DEFINITION 33
1.13.1 Add a Program Type 33
1.13.1.2 Add Program Address/Communications 35
1.13.1.3 Add Related Activities 36
1.13.1.4 Add Related Schedule 37
1.13.1.5 Add Related Sanctions and Incentives 38

1.14 FORMATTED REMARKS FIELD DEFINITIONS (FMT RMK FIELD DEF) 40
1.14.1 Add Formatted Remarks 40
1.15 SCHEDULE AGENT 42
1.15.1 Run a Schedule Agent 42
1.16 SEAL MODULE DEFINITION 44
1.16.1 Add a Seal Module Definition 44
1.17 REPORTS ADMINISTRATION 46
1.17.1 Add a Report 46
1.17.1.1 Add Security Groups with Access to Report 47
1.18 EXPUNGE CASE 49
1.18.1 Expunge a Case 49
1.19 COURTVIEW INTERFACE ADMINISTRATION 50

2.0 Security Maintenance (Security Maint.) 50

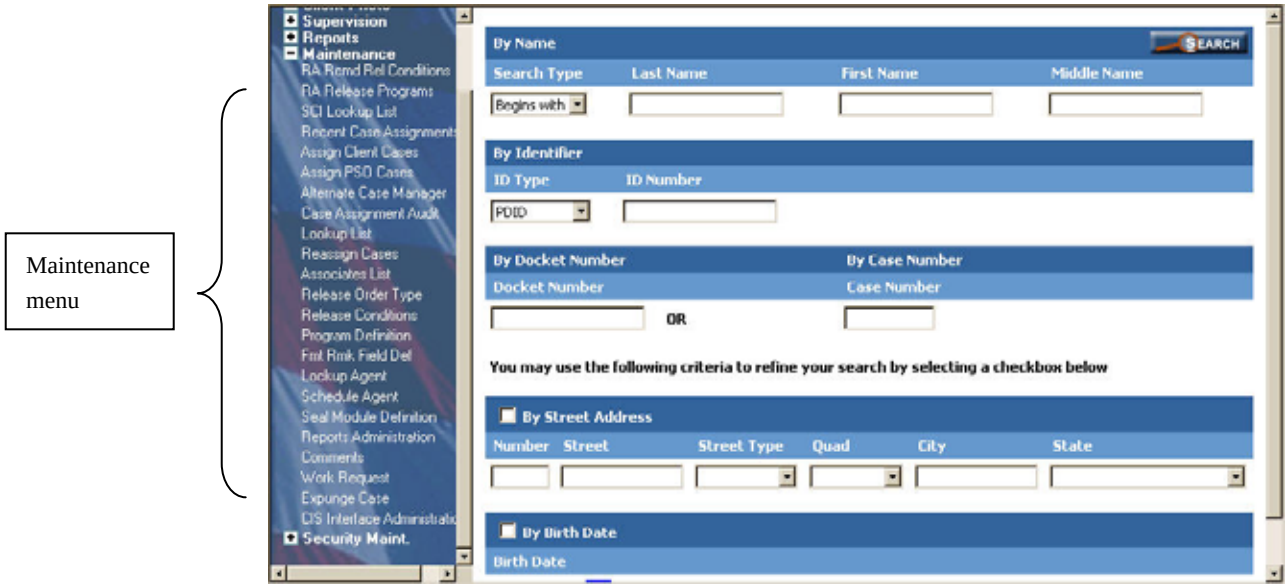
1.0 Maintenance

Purpose: The purpose of the **Maintenance** menu is to allow the PRISM system administrator(s) the ability to add, modify or delete the lookup values in the application. The lookup values are the data options that are presented to the user through such methods as drop down lists.

The **Maintenance** menu contains the following modules:

- RA Rcmd Rel Conditions
- RA Release Programs
- Recent Case Assignments
- Assign Client Cases
- Assign PSO Cases
- Alternate Case Manager
- Case Assignment Audit
- Lookup List
- Reassign Cases
- Associates List
- Release Order Type
- Release Conditions
- Program Definition
- Fmt Rmk Field Def
- Schedule Agent
- Seal Module Definition
- Reports Administration
- Expunge Case
- CIS Interface Administration

Note: Based upon a user's security level, not all of the above modules will be displayed under the **Maintenance** menu.



Maintenance menu

1.1 RA Rcmd Rel Conditions

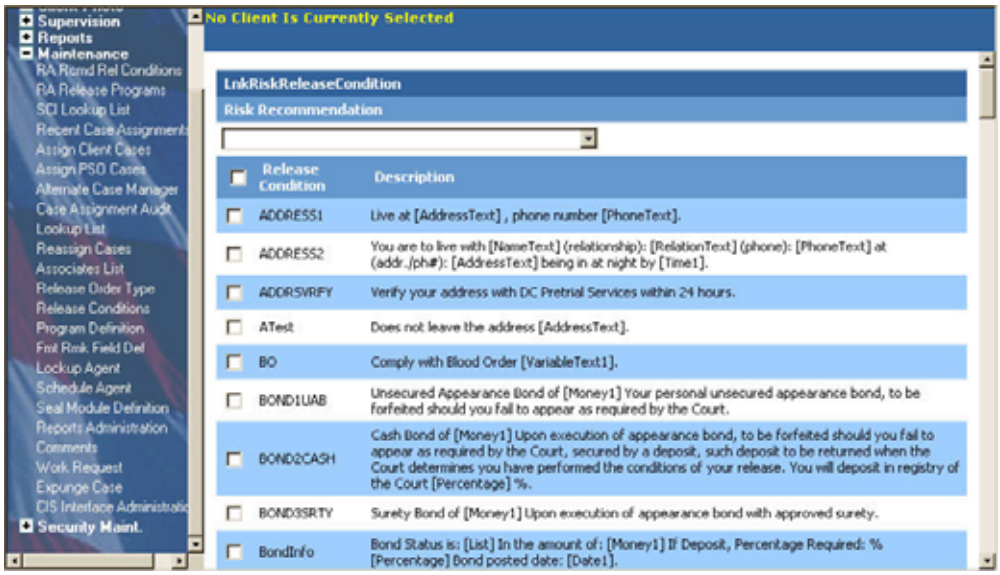
The **RA Rcmd Rel Conditions** module is located under the **Maintenance** menu.

Purpose: The module permits the PRISM administrator to link particular release conditions to specific risk classification recommendations. This module works within the PSR Reconciliation process by automatically 'turning on' specific conditions for a release recommendation when certain risk problems are found. For example, when a client being reconciled is found to have an unverified address, PRISM will automatically select the address verification condition for inclusion in the client's release recommendation.

Note: This is an administrator level function.

1.1.1 Link Release Conditions to a Risk Recommendation

1. Click on the **RA Rcmd Rel Conditions** module under the **Maintenance** menu. The Link Risk Release Condition form is displayed as illustrated below:



Link Risk Release Condition form

2. Select a problem from the Risk Recommendation dropdown list. Any existing release conditions that have previously been linked will automatically have check marks in the corresponding checkboxes.

3. Click on the checkboxes of the release conditions to be associated with the risk recommendation selected. To select all of the conditions, click on the checkbox next to the Release Condition heading.
4. Click

.

1.2 RA Release Programs

The **RA Release Programs** module is located under the **Maintenance** menu.

Purpose: This module permits the PRISM administrator to select the particular release programs that will be associated with specific risk categories. This module works within the PSR Reconciliation process by automatically populating the Release Order Type dropdown list with the programs that are associated with either the Selected or Override Risk Category.

Note: This is an administrative level function.

1.2.1 Associate a Release Program with a Risk Category

1. Click on the **RA Release Programs** module under the **Maintenance** menu. The Link Risk Release Program form is displayed as illustrated below:

Link Risk Release Program

2. Select a category from the Risk Category dropdown list. Any existing release programs that have previously been linked will automatically have check marks in the corresponding checkboxes.

3. Click on the checkboxes of the release programs to be associated with the risk category selected. To select all of the programs, click on the checkbox next to the Release Program heading.
4. Click

.

1.3 Recent Case Assignments

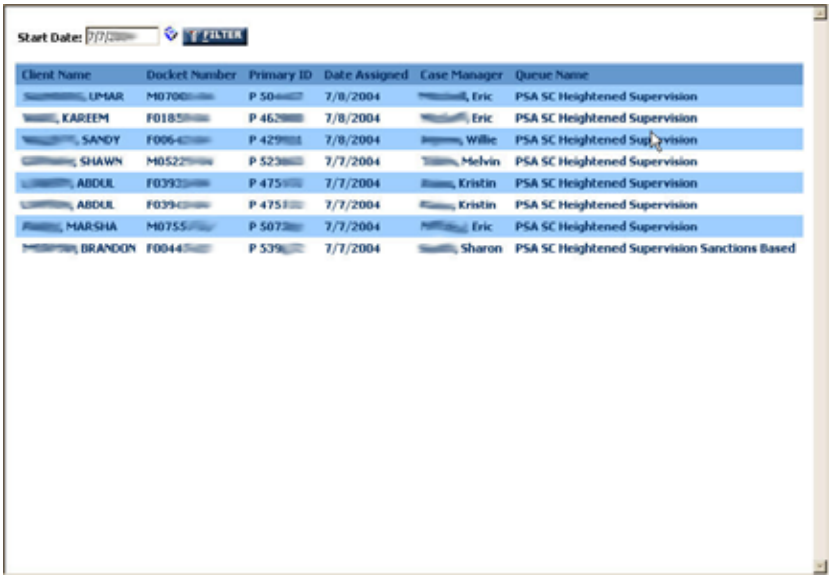
The **Recent Case Assignments** module is located under the **Maintenance** menu.

Purpose: The Recent Case Assignments function allows a supervisor to view all of the cases assigned to his or unit on a given date.

Note: This is a supervisory level function.

1.3.1 View Recent Case Assignments

1. Click on the **Recent Case Assignments** module under the **Maintenance** menu. A new browser window is opened as illustrated below:



Recent Case Assignments list

2. The user may filter the assignments displayed using the Start Date field. The default setting for the Start Date is the past 7 calendar days.

Note: The clients listed will be displayed in order by the case assignment date. The order will be descending beginning with the most recent assignments. Supervisors may also filter the manner by which the clients are displayed by clicking on one of the column headings. For example, to display the assignments in ascending alphabetical order, click on the Client

Name heading. To display the assignments by the lowest to highest docket number, click on the Docket Number heading.

To view additional information for an individual client, click on any of the information displayed for that person. In the original browser window, the Client Profile for that individual will be displayed.

1.4 Assign Client Cases

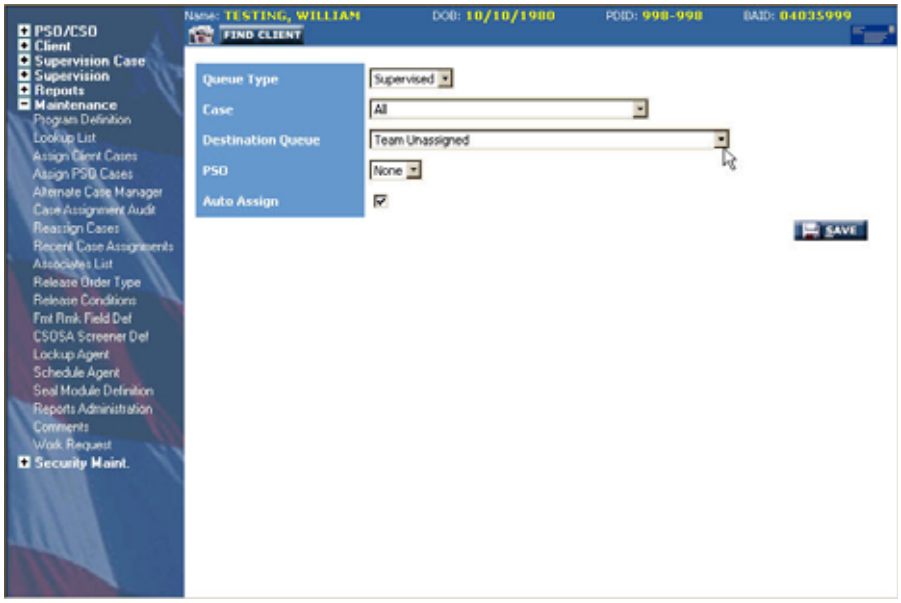
The **Assign Client Cases** module is located under the **Maintenance** menu.

Purpose: The Assign Client Cases function allows the user to manually assign a client's case(s) to a specific PSO.

Note: This is an administrator level function.

1.4.1 Assign a Client Case to a PSO

1. Perform the Find Client function and click on the **Assign Client Cases** module under the **Maintenance** menu. The Assign Client Cases form will be presented as illustrated below:



Assign Client Cases form

2. The Queue Type field will be pre-populated with the client's current supervision level according to his or her current release orders.
3. In the Case field, select a specific case for assignment or "All" for all of the client's cases from the dropdown list.
4. In the Destination Queue field, select the supervision unit to which the client will be assigned from the dropdown list.

5. The dropdown list in the PSO field will automatically be updated with the case managers from the supervision unit selected in step 4. Select a PSO from the dropdown list.
6. To keep the client from being automatically reassigned when a new release order is entered, the user must uncheck the Auto Assign checkbox. The user will keep this box checked if the client is to be automatically assigned to a unit/PSO with the entry of a new release order.
7. Click

.

1.5 Assign PSO Cases

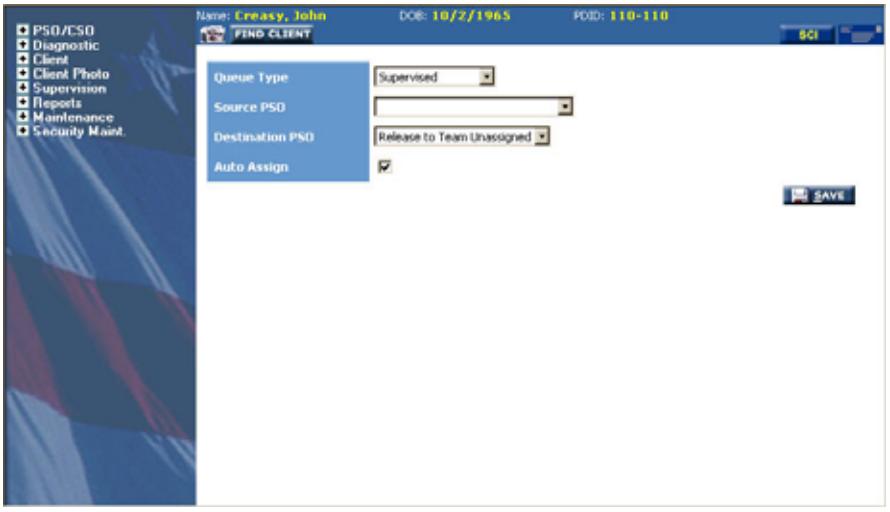
The **Assign PSO Cases** module is located under the **Maintenance** menu.

Purpose: The Assign PSO Cases function allows the user to manually assign cases from one case manager to another within a specific supervision unit.

Note: This is an administrator level function.

1.5.1 Assign Cases to PSO

1. Click on the **Assign PSO Cases** module under the **Maintenance** menu. The Assign PSO Cases form will be presented as illustrated below:



Assign PSO Cases form

2. The Queue Type field will be pre-populated with the client's current supervision level according to his or her current release orders.
3. From the Source PSO dropdown, select the case manager from which the cases are being removed.
4. From the Destination PSO dropdown, select the case manager where the cases are to be assigned.

Note: If the user does not wish to assign all of the cases to one case manager in the unit, selecting the value "Release to Team Unassigned" from the dropdown will distribute all of the cases amongst the entire unit.

5. To keep the Source PSO from being automatically assigned new cases when a new release order is entered, the user must uncheck the Auto Assign checkbox. The user will keep this box checked if the case manager is to be automatically assigned new cases with the entry of new release orders.
6. Click

.

1.6 Alternate Case Manager

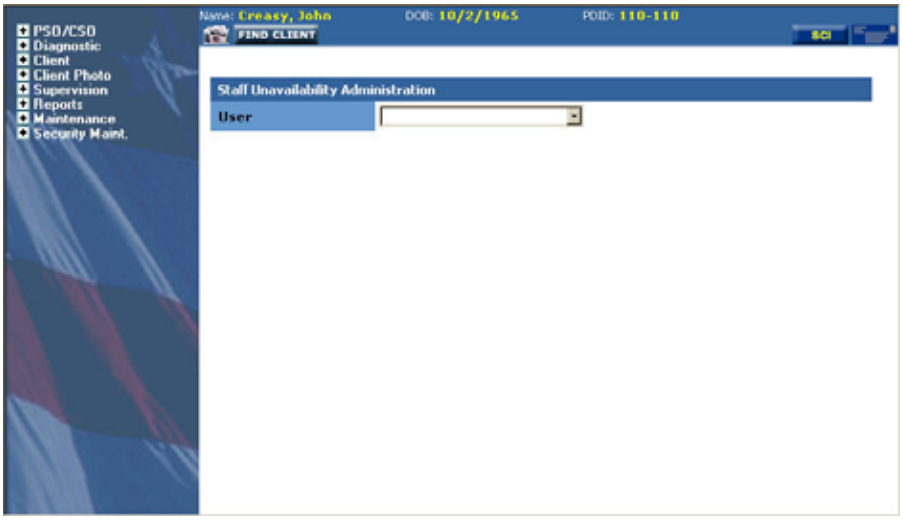
The **Alternate Case Manager** module is located under the **Maintenance** menu.

Purpose: The Alternate Case Manager function allows the user to temporarily change a client's case manager.

Note: This is an administrator/supervisory level function.

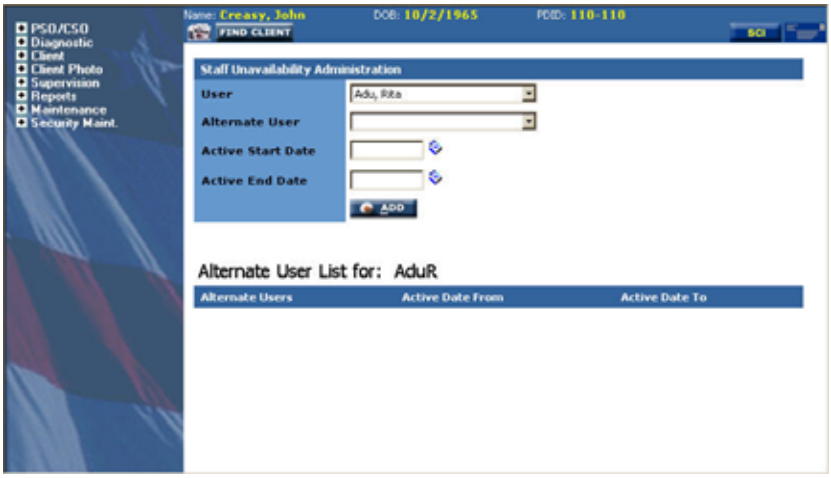
1.6.1 Temporarily Change a Case Manager

1. Click on the **Alternate Case Manager** module under the **Maintenance** menu. The Staff Unavailability Administration form will be presented as illustrated below:



Staff Unavailability Administration Form

2. From the User dropdown, select the PSO whose caseload is to be temporarily changed.
3. After selecting a PSO, the Staff Unavailability Administration form is refreshed with following new fields: Alternate User, Active Start Date, and Active End Date. Additionally, the updated form also displays a list of alternate users for the case manager selected. The refreshed screen is presented as illustrated below:



Staff Unavailability Administration form

4. From the Alternate User dropdown, select the PSO who is to receive the User's caseload.
5. Enter the dates that this action is to cover in the Active Start Date and Active End Date fields.
6. Click on the button. The Staff Unavailability Administration form will be presented with the new entry added to the Alternate User List at the bottom of the screen.

1.7 Case Assignment Audit

The **Case Assignment Audit** module is located under the **Maintenance** menu.

Purpose: The Case Assignment Audit function allows the user to view the case assignment history for a particular client.

Note: This is an administrator level function.

1.7.1 View Case Assignment History

1. Perform the Find Client function and click on the **Case Assignment Audit** module under the **Maintenance** menu. The Case Assignment Audit list will be presented as illustrated below:

Case Assignment Audit list

2. To select a case for review, click on the docket number. The Docket History for the case chosen will be presented as illustrated below:

Docket History

1.8 Lookup List

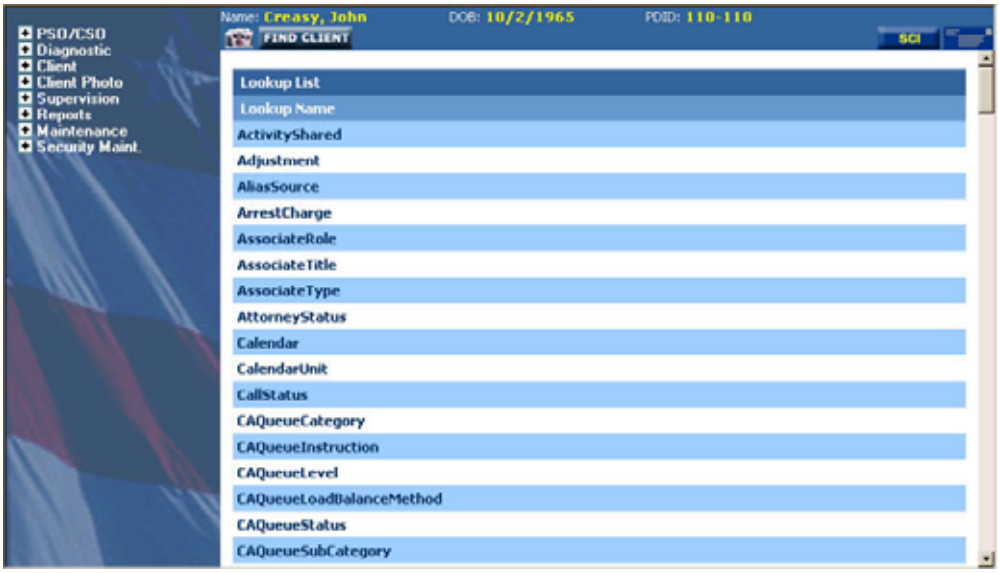
The **Lookup List** module is located under the **Maintenance** menu.

Purpose: The Lookup List function allows the user to set up the options, which appear in any dropdown contained throughout the system.

Note: This is an administrator level function.

1.8.1 *Add Options to Lookup Name*

1. Click on the **Lookup List** module under the **Maintenance** menu. The Lookup List is presented as illustrated in the figure below:



Lookup List

2. This list presents any table with the 'LU' prefix in the database.
3. Click on a Lookup Name to which an option is to be added. For example, if the user wished to add to the ActivityShared Lookup Name, click on it off of the Lookup list. The ActivityShared Lookup Screen is presented as illustrated below in the figure below:

Lookup Screen

4. Note that the options already present, if any, are displayed under the ActivitySharedCD sub list. To add a new code, click on the ADD button.
5. The Lookup Form is presented as illustrated in the figure below:

Lookup Form

6. Enter a code in ActivitySharedCD field.
7. Enter description in Descr field.
8. Choose ‘True’ or ‘False’ button for CurrentFlag
9. Choose ‘True’ or ‘False’ button for LogicalDeleteFlag
10. Click SAVE. The ActivityShared Lookup screen is presented with the newly added information displayed in the list.

1.8.2 Edit Lookup Name

1. Click on the **Lookup List** module under the **Maintenance** menu. The Lookup List is presented as illustrated in Lookup List screen above.
2. Click on the Lookup Name to be edited. For example, to edit ActivityShared Lookup Name, click on ActivityShared in the Lookup List.
3. Click on the option to be edited. The ActivityShared Lookup Form is presented as illustrated in the figure below:

Lookup Form

4. Edit/Update the appropriate information.
5. Click SAVE. The ActivityShared Lookup List is presented with the updated information displayed in the list.

1.8.3 Delete a Lookup Entry

1 Click on the **Lookup List** module under the **Maintenance** menu. The Lookup List is presented as illustrated in the Lookup List screen above.
1. Click on the Lookup Name from which an entry is to be deleted. For example, to delete an entry from ActivityShared, click on ActivityShared in the Lookup List. The ActivityShared Lookup List is presented.
2. Click on the entry to be deleted. The ActivityShared Lookup Form is presented
3. Select the "True" button for the LogicalDeleteFlag.
4. Click DELETE. A message appears stating "Click OK to confirm delete or Cancel".
5. If you still wish to delete the entry, click on OK.

6. The ActivityShared Lookup List is presented and the newly deleted entry is presented with the value “1” in the LogicalDeleteFlag field.

1.9 Reassign Cases

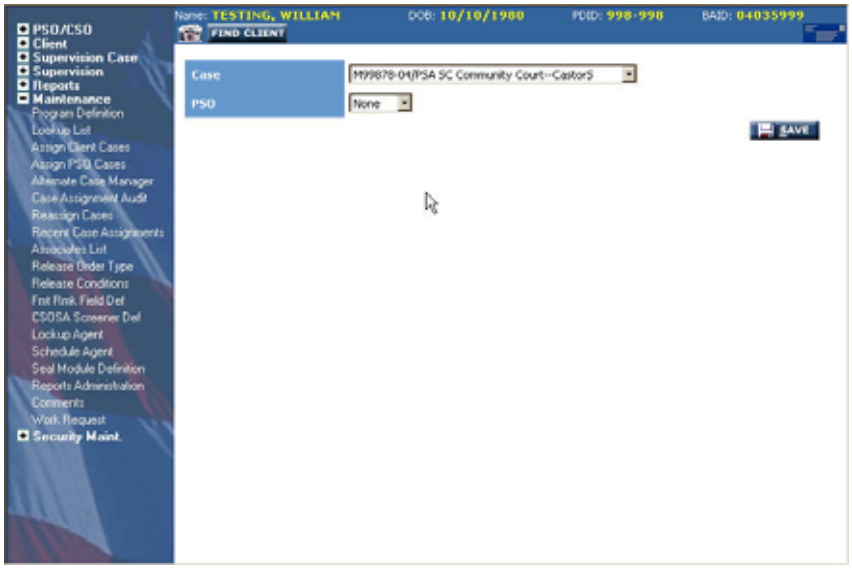
The **Reassign Cases** module is located under the **Maintenance** menu.

Purpose: The Reassign Cases function allows supervisors to reassign individual cases within the unit to which the client has been assigned.

Note: This is a supervisory level function.

1.9.1 Reassign a Case

1. Perform the Find Client function and click on the **Reassign Cases** module under the **Maintenance** menu. The Assign Client Cases form is presented as illustrated below:



Assign Client Cases form

2. Select a case for reassignment from the Case dropdown.
3. From the PSO dropdown, select the PSO who will be receiving the reassigned client. The PSO dropdown will automatically be populated with the available case managers for the unit to which the client's case has already been assigned.
4. Click SAVE.

1.10 Associates List

The **Associates List** module is located under the **Maintenance** menu.

Purpose: The **Associates List** module is designed to store information on judges and attorneys connected to PSA.

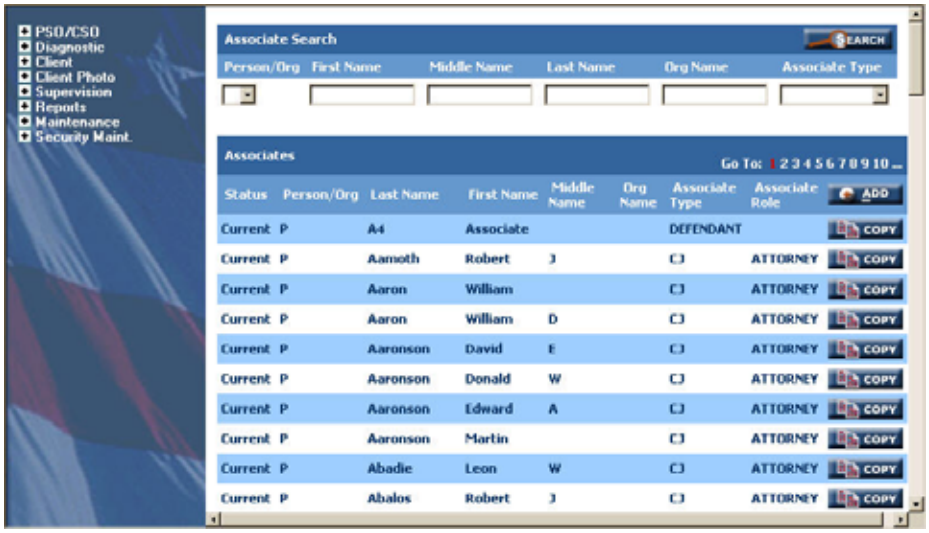
Note: This is an administrator level function.

1.10.1 Search for an Associate

1. To search for an associate, users may either scroll through each page of the list or filter their search using the Associate Search sub list.
2. Users may define their search by Person/Org, First Name, Middle Name, Last Name, Org Name, or Associate Type.
3. Type in the search parameters and/or select a value from the dropdown and click SEARCH. The list will be updated with associates matching the search parameters.

1.10.2 Add a New Associate

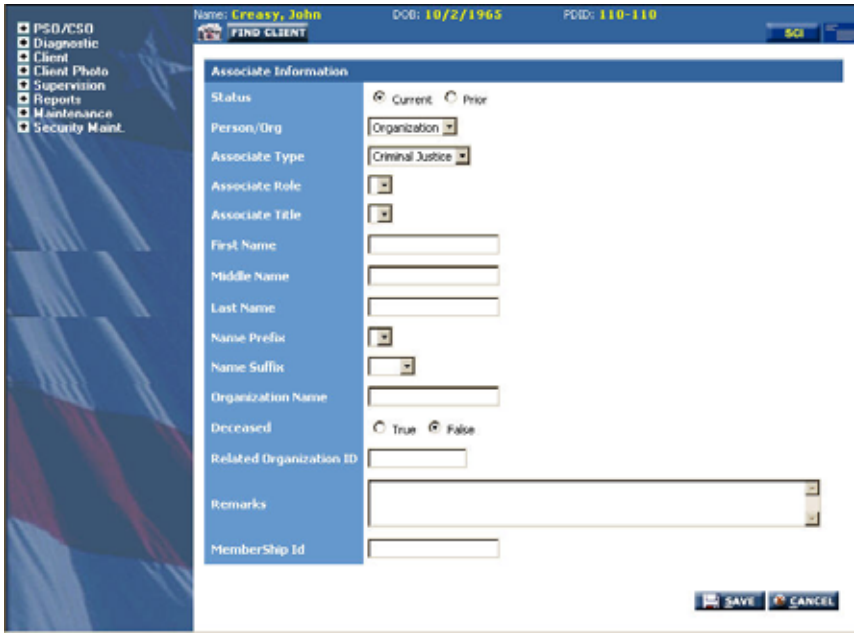
1. Click on the **Associates List** module under the **Maintenance** menu. The Associates list will be presented as illustrated below:



Associates List

2. Click on the

button. The user will be presented with the Associates form as illustrated below:



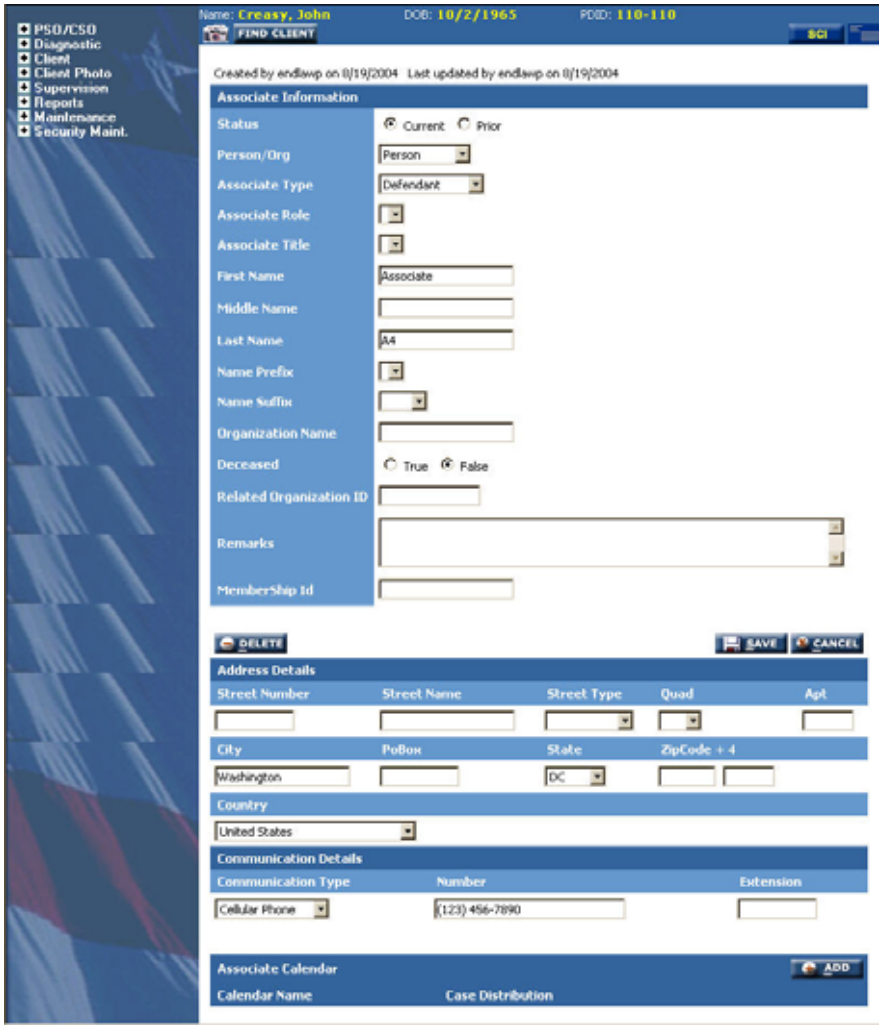
Associates Form

3. Using the checkboxes, select ‘Current’ or ‘Prior’ for the associate Status.
4. Select either ‘Organization’ or ‘Person’ from the Person/Org dropdown.
5. Select the appropriate Associate Type from the dropdown options.
6. From the dropdown menu, select either ‘Attorney’ or ‘Judge’ for the Associate’s Role.
7. If the Associate’s Role was selected as ‘Judge’ select ‘Honorable’ from the Associate’s Title dropdown.
8. Enter the associate’s name in the fields provided.
9. Complete the remaining fields as needed.
10. Click

. The user will be returned to the Associates list.

1.10.2.1 Add Address and Communication Details

1. Click on the associate to which this information is to be added. The Associates form is presented with three additional sub lists: Address Details, Communication Details, Associate Calendar as illustrated below:



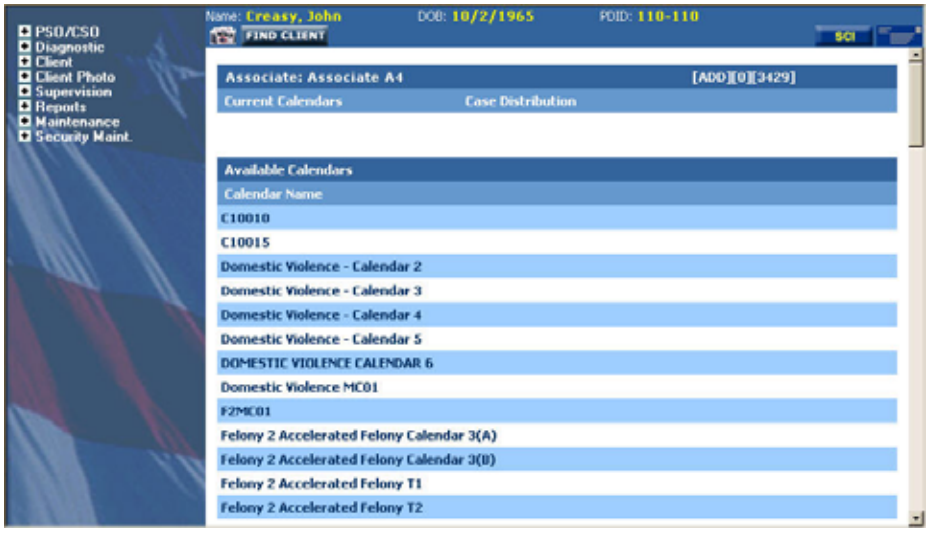
Associates Form

2. Enter Address and/or Communication Details as needed and click . The user is returned to the Associates list.

1.10.2.2 Add Associate Calendar Information

Note: This function is designed to associate a judge with a particular court calendar. After a judge has been associated to a calendar, any time that a calendar is entered into PRISM (ex: adding a court case), the Judge field will automatically populate with the associated judge.

1. Click on the associate to be associated with a calendar. The Associates form will be presented as illustrated above.
2. Click on the ADD button at the bottom of the screen in the Associate Calendar sub list. The available associations will be presented as illustrated:



Calendar Associates list

3. To associate a calendar to the associate selected, click on one of the calendars listed. The Calendar Associates list will be updated with the calendar selected displayed under the associate's name.

1.11 Release Order Type

The **Release Order Type** module is located under the **Maintenance** menu.

Purpose: The Release Orders function allows the user to view current release programs, add a new release program and to edit a particular release program. Users may also link Release Types to specific Release Orders using this module.

Note: This is an administrator level function.

1.11.1 View and/or Edit a Release Program

1. Click on the **Release Order Type** module under the **Maintenance** menu. The Release Programs list is presented displaying all of the current Release Programs as illustrated below:

Release Programs List

2. Click on the program to be viewed and/or edited.
3. The Release Programs form is presented as illustrated in the figure below:

Release Programs form

4. Edit the data presented as needed. Click on the button to save the changes made to the program.

1.11.1.1 Link a Release Type to a Release Program

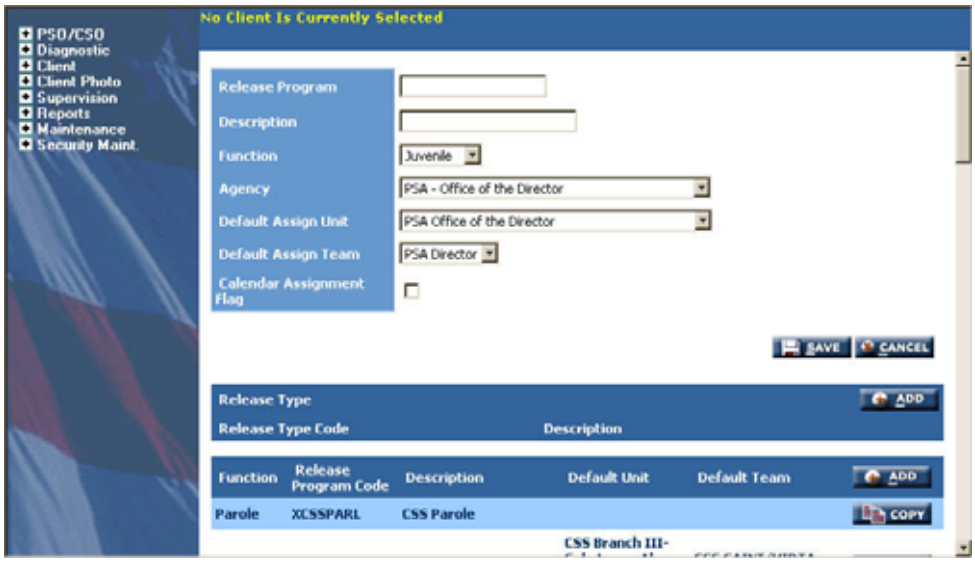
1. In the **Release Order Type** module, click on the Release Program desired.
2. In the Release Type sub list, click on the button. The Reports Access Administration list is presented as illustrated below:

Reports Access Administration list

3. Click on the Release Type to be linked to the selected Release Program. The user will be returned to the Release Programs form and the Release Type sub list will be updated to reflect the new Release Type associated with the program.

1.11.2 Add a Release Program

1. Click on the **Release Order Type** module under the **Maintenance** menu. The Release Programs List is presented displaying all of the current Release Programs.
2. Click on the ADD button. The Release Programs form is presented as illustrated in the figure below:



Release Programs Form

3. Enter program in the Release Program field.
4. Enter a description in the Description field.
5. Choose a function from the Function dropdown menu.
6. Choose the default unit from the Default Assign Unit dropdown menu.
7. Choose the default team from the Default Assign Team dropdown menu.
8. Check the Calendar Assignment Flag box as needed.
9. Click SAVE. The Release Programs List is presented and the newly added release program is displayed in the list.

1.12 Release Conditions

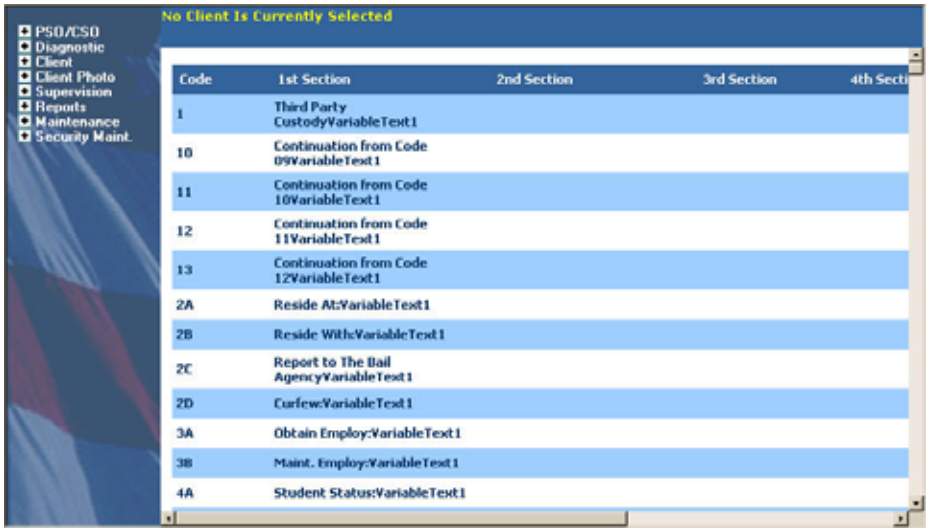
The **Release Conditions** module is located under the **Maintenance** menu.

Purpose: The Release Conditions function allows the user to set up various release conditions.

Note: This is an administrator level function.

1.12.1 Add a Release Condition

1. Click on the **Release Conditions** module under the **Maintenance** menu. The Release Conditions List is presented displaying all of the current Release Conditions as illustrated in the figure below:

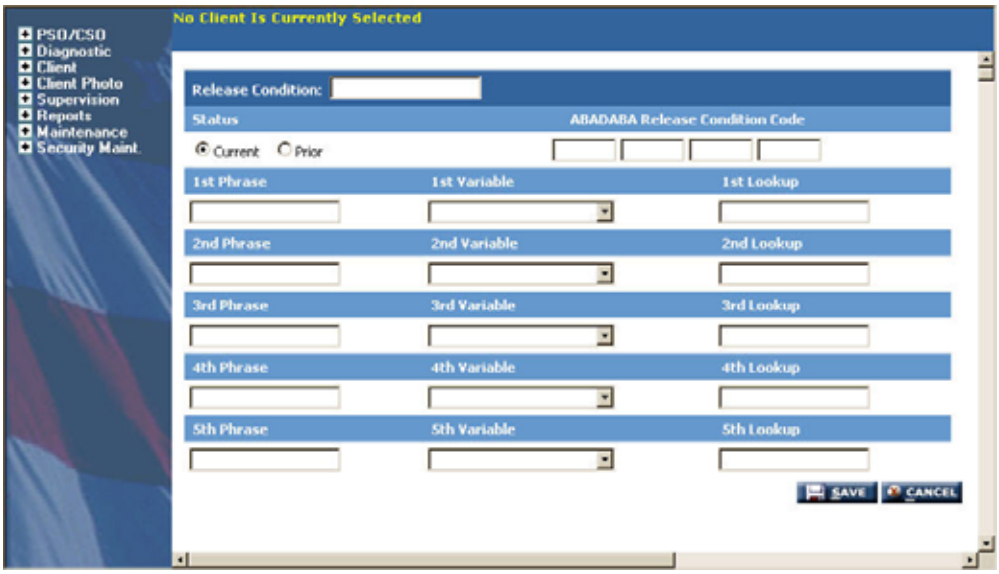


Release Conditions List

2. Click on the button, illustrated in the figure below, located on the right hand side of the screen. (Note: You may have to scroll to the right to view the ADD button).

Release Conditions List

3. The Release Conditions Form is presented as illustrated in the figure below:



Release Conditions Form

4. Enter condition in Release Condition field.
5. Select Status.
6. Enter the ABADABA Release Condition Code if applicable.
7. Enter the phrases, variables and lookups as needed in their respective fields.
8. Click SAVE. The Release Condition List is presented and the newly added condition is displayed in the list.

1.13 Program Definition

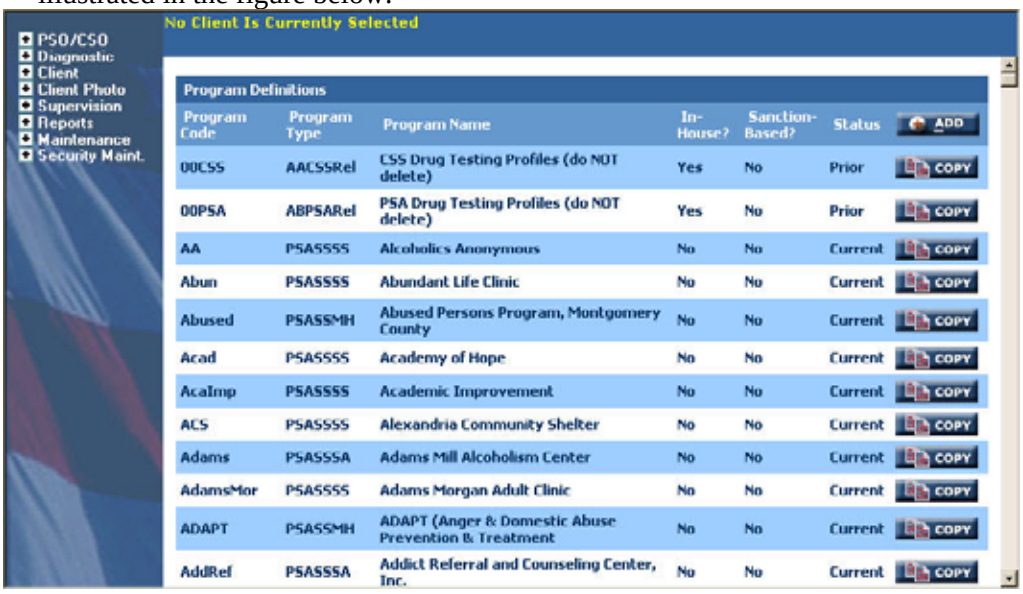
The **Program Definition** module is located under the **Maintenance** menu.

Purpose: The Program Definition function allows the user to add, edit or delete a Program type. Programs may either be internal (New Directions, General Supervision Unit) or external (Harbor Lights, APRA).

Note: This is an administrator level function.

1.13.1 Add a Program Type

1. Click on the **Program Definition** module under the **Maintenance** menu. The Program Definition List is presented displaying all of the current Program Definitions as illustrated in the figure below:



Program Code	Program Type	Program Name	In-House?	Sanction-Based?	Status
00CSS	AACSSRel	CSS Drug Testing Profiles (do NOT delete)	Yes	No	Prior
00PSA	ABPSARel	PSA Drug Testing Profiles (do NOT delete)	Yes	No	Prior
AA	PSASSSS	Alcoholics Anonymous	No	No	Current
Abun	PSASSSS	Abundant Life Clinic	No	No	Current
Abused	PSASSMH	Abused Persons Program, Montgomery County	No	No	Current
Acad	PSASSSS	Academy of Hope	No	No	Current
AcaImp	PSASSSS	Academic Improvement	No	No	Current
ACS	PSASSSS	Alexandria Community Shelter	No	No	Current
Adams	PSASSSA	Adams Mill Alcoholism Center	No	No	Current
AdamsMor	PSASSSS	Adams Morgan Adult Clinic	No	No	Current
ADAPT	PSASSMH	ADAPT (Anger & Domestic Abuse Prevention & Treatment	No	No	Current
AddRef	PSASSSA	Addict Referral and Counseling Center, Inc.	No	No	Current

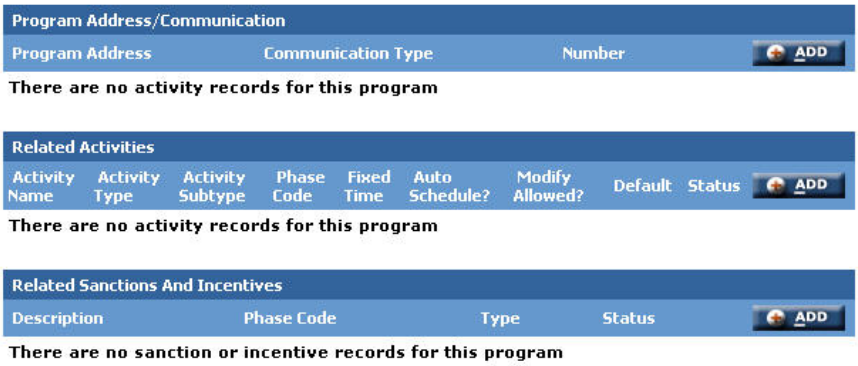
Program Definition List

2. Click on the ADD button. The Program Definition Form is presented as illustrated in the figure below:

Program Definition Form

3. Enter the code in the Program Code field. A Program Code must be unique and no more than 10 characters in length.
4. Enter the name in the Program Name dropdown menu.
5. Select the type of program from the Program Type dropdown menu.
6. Click on either ‘Yes’ or ‘No’ to indicate if the program is internal or not.
7. Click on either ‘Yes’ or ‘No’ to indicate if the program is Sanction-based.
8. Using the checkboxes displayed, indicate the function of the program.

9. For any program that is not internal, complete the External Program Information and Services sub lists as needed.
10. Click SAVE. The Program Definition form is refreshed with the saved information. Three new sub lists, Program Address/Communication, Related Activities, and Related Sanctions and Incentives, are also displayed in the bottom half of the screen as illustrated in the figure below:

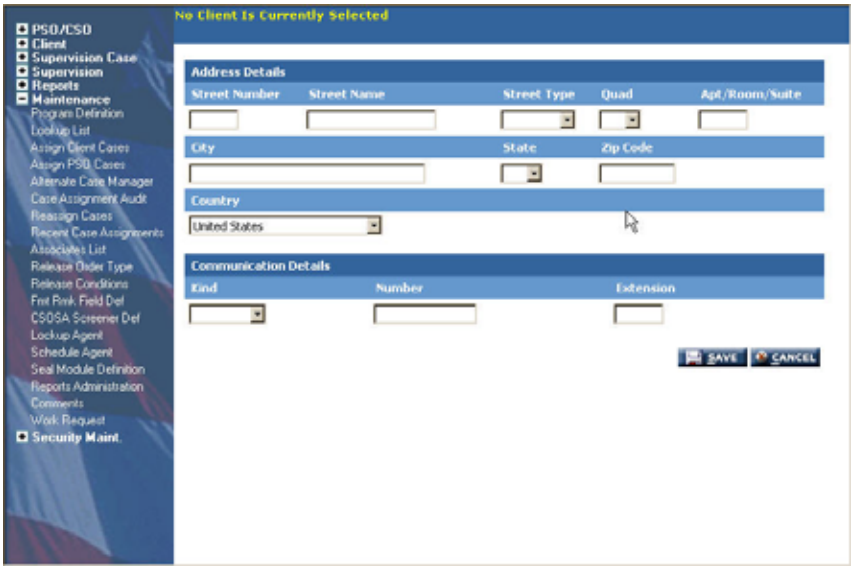


Program Definition Form

11. To return to the Program Definition list, click CANCEL. The Program Definition List is presented and the new entry is displayed in the list.

1.13.1.2 Add Program Address/Communications

1. Click on the **Program Definition** module under the **Maintenance** menu. The Program Definition List is presented displaying all of the current Program Definitions.
2. Click on the program to which the address/communication information is to be added. Click on the ADD button on the Program Address/Communication sub list. The Program Address form is presented as illustrated below:

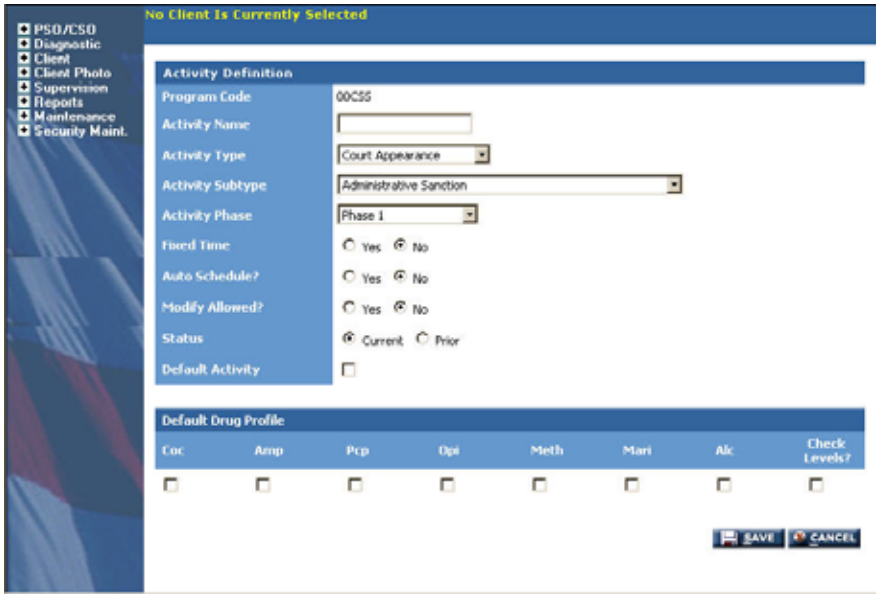


Program Address Form

3. Add the address and/or communication information as needed. Click to return to the Program Definition Form. The form will be updated to display the address/communication information entered by the user.

1.13.1.3 Add Related Activities

1. Click on the **Program Definition** module under the **Maintenance** menu. The Program Definition List is presented displaying all of the current Program Definitions.
2. Click on the program to which the activity is to be added. The Program Definition form is presented.
3. Click on the button under the Related Activities sub list. The Activity Definition Form is presented as illustrated in the figure below:



Activity Definition Form

4. In the Activity Name field, type in the name of the activity.
5. Choose the type of activity from the Activity Type dropdown menu.
6. Choose the subtype of the activity from the Activity Subtype dropdown menu.
7. Choose a phase from Activity Phase dropdown menu.
8. Select 'Yes' or 'No' on the Fixed Time checkbox.
9. Select 'Yes' or 'No' on the Auto Schedule checkbox.
10. Select 'Yes' or 'No' on the Modify Allowed checkbox.
11. Select the Status for the activity.
12. Check the Default Activity checkbox if this activity is to be a default activity.
13. Check the corresponding check boxes under Default Drug Profile if applicable.
14. Click SAVE. The screen is refreshed with the saved information

1.13.1.4 Add Related Schedule

1. Click on the **Program Definition** module under the **Maintenance** menu. The Program Definition List is presented displaying all of the current Program Definitions.
2. Click on the appropriate Program, which contains the activity to which the schedule is to be added. The Program Definition form is presented.
3. Click on the appropriate activity under the Related Activities sub list. The Activity Definition Form is presented.
4. Click on the ADD button in the Related Schedule sub list. The Schedule Definition Form is presented as illustrated in the figure below:

Schedule Definition Form

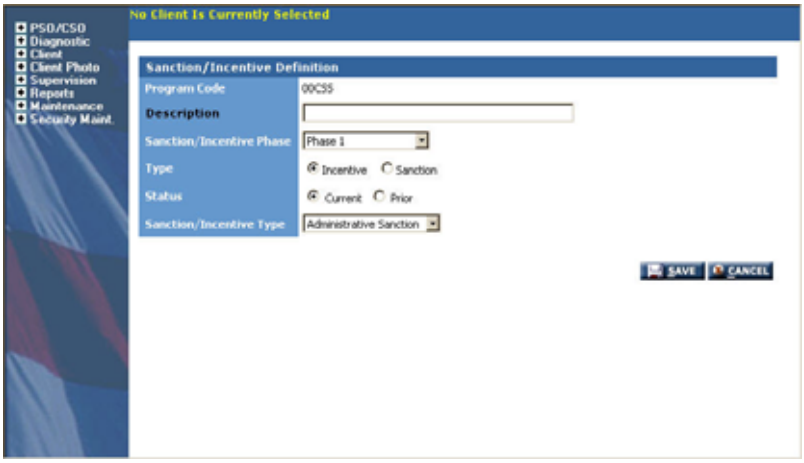
Note: Note that **in bold face type** fields with an ***** are mandatory fields and must be entered in order to save the information.

5. Enter the name in the Schedule Name field.
6. Using the 'Yes' or 'No' buttons, select a Status.
7. Select 'Yes' or 'No' for Default Schedule.
8. Check the appropriate Day check boxes under the Schedule sub list.
9. Enter the Start Time and End Time for the corresponding days in the Start Time and End Time fields OR enter a number in the Number Times field and select a period from the Period dropdown menu.
10. Click SAVE. The screen is refreshed with the newly saved information. Click on the Program Definitions menu option to return to the Program Definitions list.

1.13.1.5 Add Related Sanctions and Incentives

1. Click on the **Program Definition** module under the **Maintenance** menu. The Program Definition List is presented displaying all of the current Program Definitions.
2. Click on the Program to which the sanctions and incentives are to be added. The Program Definition form is presented.

3. Click on the ADD button under the Related Sanctions and Incentives sub list. The Sanctions/Incentives Definition Form is presented as illustrated in the figure below:



Sanction/Incentive Definition Form

Note: Note that **in bold face type** fields with an ***** are mandatory fields and must be entered in order to save the information.

4. Enter the description in the Description field.
5. Select phase from the Sanction/Incentive Phase dropdown menu.
6. Select 'Sanction' or 'Incentive' for Type.
7. Select 'Yes' or 'No' to indicate the Status.
8. Click SAVE. The screen is refreshed with the saved information. Click on the **Program Definitions** module option to return to the Program Definitions List.

1.14 Formatted Remarks Field Definitions (Fmt Rmk Field Def)

The **Formatted Remarks Field Definitions** module is located under the **Maintenance** menu.

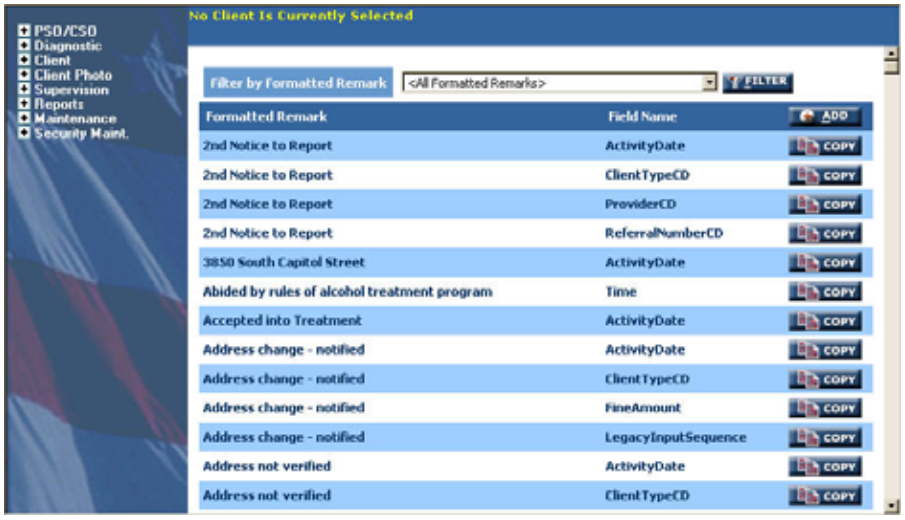
Purpose: The Formatted Remarks function allows the user to set and relate pre-selected remarks to appear in certain screens and/or a particular field.

Note: This is an administrator level function.

1.14.1 Add Formatted Remarks

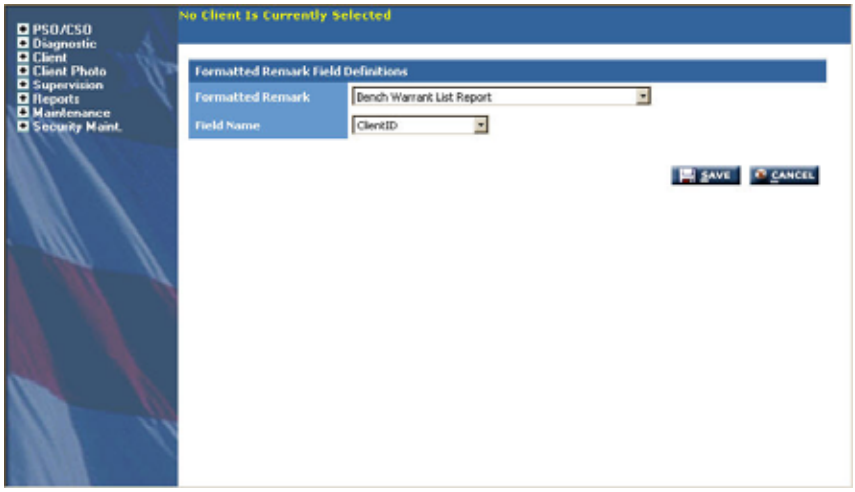
Note: In order to add a formatted remark, users must create a remark first through the X module.

1. Click on the **Formatted Remarks** module under the **Maintenance** menu. The Formatted Remarks Field Definitions List is presented as illustrated in the figure below:



Formatted Remarks Field Definitions List

2. Click on the button. The Formatted Remarks Field Definitions Form is presented as illustrated in the figure below:



Formatted Remarks Field Definitions Form

3. Choose remark from Formatted Remarks dropdown menu.
4. Chose name from Field Name dropdown menu.
5. Click SAVE. The Formatted Remarks Field Definition List is presented with the newly saved information displayed in the list.

1.15 Schedule Agent

The **Schedule Agent** module is located under the **Maintenance** menu.

Purpose: The Schedule Agent is a system-automated process, which schedules clients (date and time) for Check In, Curfew Calls, Drug Testing, and Sessions.

Note: The Schedule Agent can run each agent individually or together as a group.

Note: This is an administrator level function.

1.15.1 Run a Schedule Agent

1. Click on the **Schedule Agent** module located under the **Maintenance** menu. The Schedule Agent list is presented as illustrated in the Figure below:

Schedule Agent List

2. Click in the check box(es) located next to the selected Schedule Agent.
3. Click on the Run Agent button. The list is refreshed and a message reading "Scheduling Agent Completed Successfully!" will be presented on the top of the screen as illustrated in the figure below:

Schedule Agent list

1.16 Seal Module Definition

The **Seal Module Definition** module is located under the **Maintenance** menu.

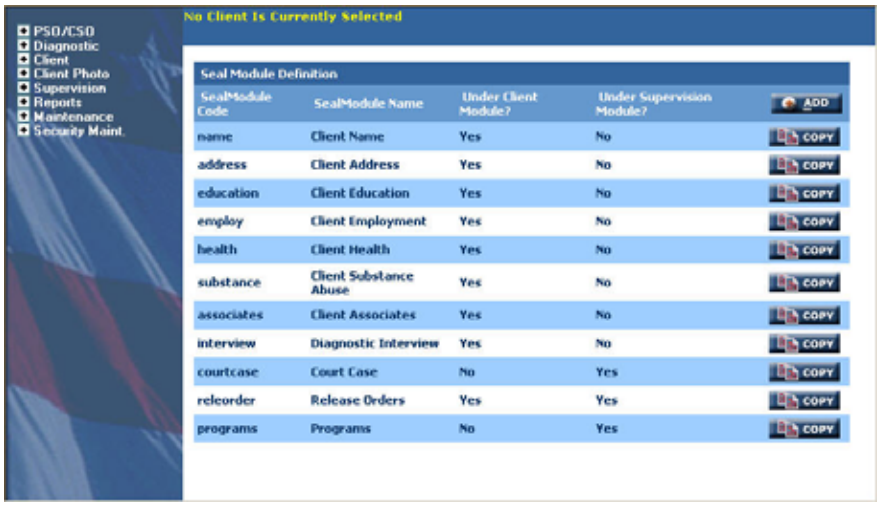
Purpose: The Seal Module Definition form is used to determine how the Seal Case screen is organized.

Note: This is an administrator level function.

Note: A new module cannot be added to the list unless a developer links the new entry with an ASP page.

1.16.1 Add a Seal Module Definition

1. Click on the **Seal Module Definition** module under the **Maintenance** menu. The Seal Module Definition list is displayed as illustrated below:



Seal Modules Definition list

2. Click on the button and the Seal Module Definition form is displayed as illustrated below:

Seal Module Definition form

3. Type in the Seal Module Code.
4. Type in the Seal Module Name.
5. Click on either the Supervision or Client radio button.
6. Click on either Current or Prior radio button.
7. Click SAVE.

1.17 Reports Administration

The **Reports Administration** module is located under the **Maintenance** menu.

Purpose: The **Reports Administration** module allows the user to view, add, copy and delete all user reports.

Note: This is an administrator level function.

1.17.1 Add a Report

1. Click on the **Reports Administration** module under the **Maintenance** menu. The Reports Administration List is presented as illustrated in the figure below:

Reports Administration List

2. Click on the button. The Reports Administration Form is presented a illustrated in the figure below:

Reports Administration Form

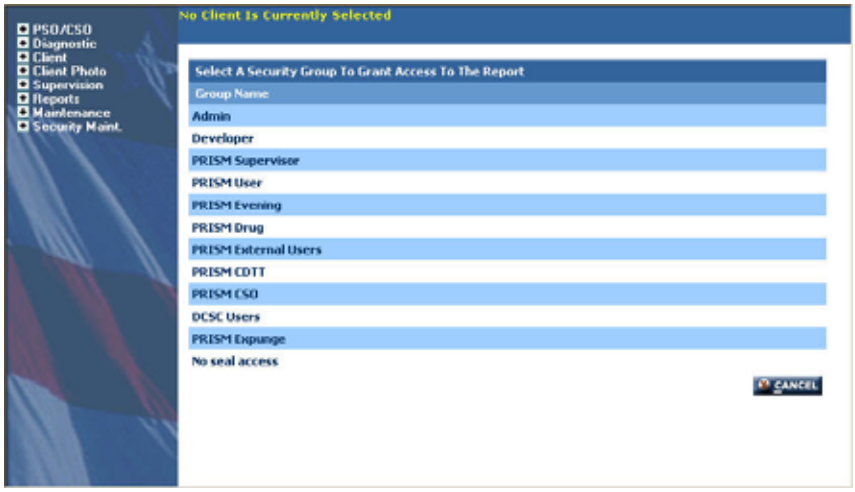
Note: Note that **in bold face type** fields are mandatory fields and must be entered in order to save the information.

3. Select the Status of the report.
4. Enter the title of the report in the Title field.
5. Enter a name in the File Name field.
6. Enter post page in Post Page field.
7. Enter parameter page in Parameter Page field.
8. Choose a record type from the Record Type dropdown menu.
9. Check the Logged Report check box.
10. Check the Regeneration of Reports check box.
11. From the dropdown menu, select a Formatted Remark Link.
12. Click SAVE. The Reports Administration List is presented and the newly added report appears on the list.

1.17.1.1 Add Security Groups with Access to Report

1. Click on the **Reports Administration** module under the **Maintenance** menu. The Reports Administration List is presented.
2. Click on the Report Name you wish to allow security groups to have access to. The Reports Administration Form is presented.

3. Click on the ADD button in the Security Groups with Access To This Report sub list. The Security Group List is presented as illustrated in the figure below:



Security Group List

Note: Only groups that have not already been added are displayed on this list.

4. Click on the name of the Security Group to be granted access.
5. The Reports Administration Form is presented and the newly added Security Group information is displayed under the Security Groups with Access To This Reports sub list.

1.18 Expunge Case

The **Expunge Case** module is located under the **Maintenance** menu.

Purpose: This module is designed to permit an administrative level user to expunge a case from PRISM.

Note: This is an administrator level function.

1.18.1 Expunge a Case

1. Perform the Find Client function and click on the **Expunge Case** module under the **Maintenance** menu. Any cases that can be expunged are displayed as illustrated below:

2. Click EXPUNGE. A message will be displayed requesting confirmation that the user wishes to expunge the case in question. Click on the Ok button.

Note: The message displayed states: "Expunging a case will COMPLETELY REMOVE the data from the database. The data CANNOT be retrieved once it is expunged. Are you absolutely sure that you want to proceed with expunging this case?"

3. The screen is refreshed with the expunged case removed from the list.

1.19 CourtView Interface Administration

The **CourtView Interface Administration** module is located under the **Maintenance** menu.

Purpose: This module is designed to correct errors encountered during the interface between PRISM and the Superior Court database.

2.0 Security Maintenance (Security Maint.)

Purpose: The purpose of the **Security Maintenance** menu is to allow the PRISM System Administrator(s) the ability to add, delete or modify the security features within PRISM.

[Intentionally Removed for security reasons – 04/22/2009dkc]