



NEVADA JUDICIAL BRANCH

TRIAL COURT TECHNOLOGY SUPPORT UNIT

Nevada Court System CourtView Dashboard User Manual v1.1

TRIAL COURT TECHNOLOGY SUPPORT UNIT

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1. Quick Start

The Dashboard is a CourtView plug-in that integrates with the CourtView Favorites menu. The combination of the Dashboard and Favorites menu allows you to create a set of links that reduce keystrokes and mouse clicks by connecting you directly to CourtView screens, searches and reports you use most often.

The Dashboard opens automatically in a separate window when you log into CourtView and displays 'in front' of CourtView initially. You can minimize it to get to the CourtView application. And because CourtView is in one window and the Dashboard is in another one, it's easy to toggle between the two by clicking the other window on the Windows task bar.

To set up your Dashboard, you simply navigate to a screen or report in CourtView and then select one of the options from the Favorites menu to save a link on your Dashboard. If the screen is a search or report screen, you can also save criteria and other selections and later run the search or report from the Favorites menu or the Dashboard link without having to re-enter the search criteria again.

There is also a new Query History feature. It allows you to scroll backward and forward through your ten most recent searches regardless of whether you ran one of your favorite saved searches or entered fresh search criteria.

Dashboard Sections

The Dashboard is divided into several sections, which are described briefly below and in more detail later in this manual.

My Quick Links – This section is for links to screens that you navigate to most often. When you click a Quick Link on the Dashboard, CourtView opens the screen so you don't have to open the module and then navigate through the various menu options, buttons and links to get to that screen.

My Favorites – This section is for links to your favorite searches. When you click a My Favorites link on the Dashboard, CourtView automatically runs the report and displays the most current data. My Favorites eliminates the need to manually enter search criteria. It also keeps an up to the minute record count for each search.

My Ticklers – This section also saves searches and reports specific to search screens related to Ticklers. Since Ticklers are reminders and mainly date driven, they are separated out from My Favorites although they accomplish the same goal.

My Reports – This section is for the Reports you run often. When you click one of the links in this section, the report generates and either prints or displays in the print preview window, depending on what you selected when you saved the report parameters.

The screenshot shows the CourtView Dashboard interface. At the top, it says "Welcome, DIANA! Today is Tuesday, March 4, 2014" and includes a "Refresh" button. The dashboard is divided into several sections:

- My Notifications**: A section for notifications for today.
- My Favorites**: A section with 33 items, including "FTA Notice". A callout box points to this section with the text: "Links to searches".
- My Reports**: A section with "Daily Filing Report" and "Disposition Report". A callout box points to this section with the text: "Links to frequently used report settings".
- My Quick Links**: A section with links for "Search Cases", "New Cases", "Report Selection", and "Calendars". A callout box points to this section with the text: "Links to the screens you use often".
- My Ticklers**: A section with 0 items, including "My Ticklers". A callout box points to this section with the text: "Links to favorite searches and reports specific to Ticklers".

Additional callouts on the right side of the dashboard:

- A callout points to the "Refresh" button with the text: "Click the Refresh button to update record counts and links".
- A callout points to the "My Quick Links" section with the text: "Add links to this section by navigating to a screen in CourtView and selecting 'Add to Quick Links' from the Favorites menu".

At the bottom of the dashboard, a callout box explains how to add links to the sections:

Add links to these sections by running a query in CourtView and selecting "Add to Favorite Searches" and placing a checkmark in the "Include on Dashboard" box

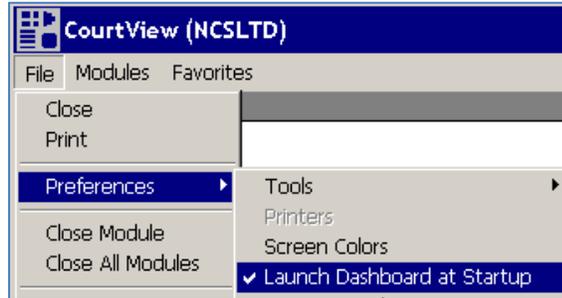
Opening and Closing the Dashboard

The Dashboard opens automatically when you log into CourtView. But you can disable that feature and manually open and close the dashboard as needed if you prefer.

Note: Your Dashboard will be blank until you add links to it.

To Prevent the Dashboard from Opening Automatically

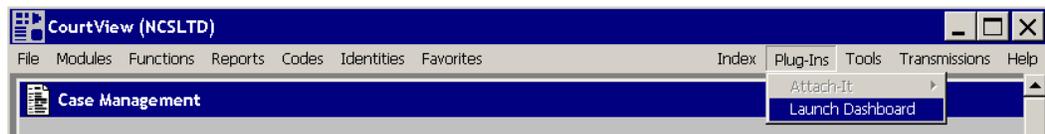
- From the **File** menu, point to **Preferences**, and then select **Launch Dashboard at Startup**.



Each time you select the Launch Dashboard at Startup menu option, the check mark toggles on and off. When the menu item is checked, the dashboard will open automatically every time you log onto CourtView. When it is unchecked, the Dashboard will not open automatically, but you can open it manually from the Plug-Ins menu.

To Open the Dashboard Manually

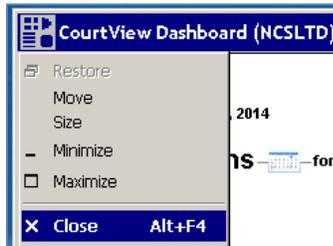
- Select **Modules, Case Management**, from the **Plug-Ins** menu, select **Launch Dashboard**.



Note: The Plug-Ins menu is disabled when no CourtView Modules are open. To enable it, select one of the modules, such as Case Management from the Modules menu.

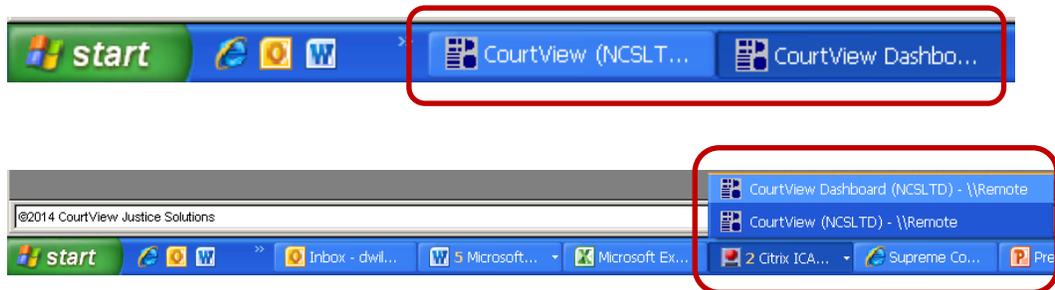
To Close the Dashboard

- Click the **CourtView icon** in the upper left corner of the window, and then select **Close**.



To Toggle between the Dashboard and CourtView

- When the dashboard is open, you can toggle between CourtView and the Dashboard by clicking the appropriate window on your taskbar.



Note: These are two examples of how the CourtView and Dashboard applications might look on the Taskbar when they are both open. Depending on the version of Windows installed on your computer and how many other windows are open, your Taskbar may look different from these examples.

2. My Quick Links

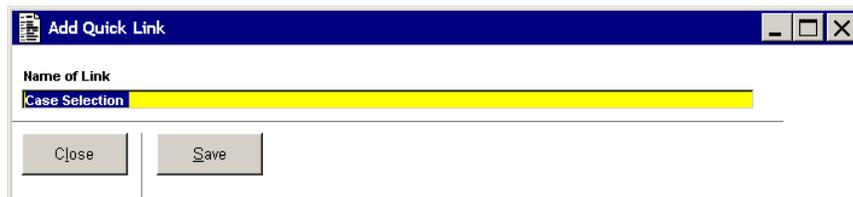
Quick Links allow you to navigate to CourtView screens with one click. You can add most screens to Quick Links.

To Add Quick Links to the Dashboard

1. Navigate to the screen in CourtView that you would like to add as a Quick Link.
2. On the **Favorites** menu in CourtView, choose **Add to Quick Links**.



3. The Add Quick Link dialogue box displays with the active screen name. You can accept the name or replace it with something else.



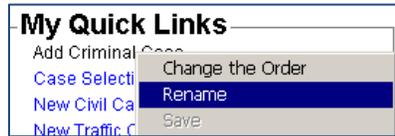
4. Enter a name that you want to display on the Dashboard, and then choose **Save**.

CourtView will add the new Quick Link to the bottom of the list in the My Quick Links section of your Dashboard.

Hint: After you have added several Links to your Dashboard, you can reorder, rename, or delete them. You can also create separators to organize them.

To Change the Name of a Link

1. Place the cursor over the Link you would like to re-name, and right-click to open the menu. Choose **Rename**.



2. Edit the name, right-click and then choose **Save**.



To Reorder Links

1. Place the cursor over the Link you want to move, right-click to open the menu, and choose **Change the Order**.



Boxes will display next to each link with sequence numbers. These numbers correspond to the order in which links and separators appear in the list.

2. Edit the numbers.



Navigate forward and backward through the boxes with the mouse, or Tab to go forward and Shift + Tab to move backward.

Hint: If you leave gaps in the number sequence, you can add new links between existing links without adjusting the numbers for all links.

3. When you are ready to save the changes, right-click and choose **Save**.
4. The links will be displayed in the new order.

To Remove a Link from the Dashboard

1. Place the cursor over the Quick Link you would like to delete, right-click to open the menu, and choose **Remove from Dashboard**.



2. The link will be deleted from the dashboard.

To Add Separators between Quick Links

If you have several Quick Links, you can separate groups of links with text to make it easier to organize them. (At this time, separators cannot be added to other sections of the Dashboard.)

1. Place the cursor over the Quick Link where you would like to insert a separator, right-click to open the menu, and choose **Add Separator (Above)** or **Add Separator (Below)**.



An edit box displays in the position where the separator will be inserted. If this is not where you want the separator, you move it by changing the order of the links.

2. Enter text for the separator, right-click and then choose **Save**.



3. The separator will be added to the Dashboard.



Hint:

You can make several changes at once by selecting multiple options from the right-click menu. For example, first right-click and choose rename, then right-click and choose re-order, make the changes, and then choose Save.

3. My Favorites

There are three ways to view searches without having to re-enter the search criteria.

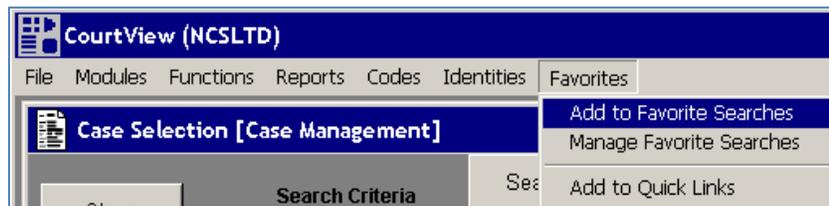
- Save search as a Favorite in the CourtView application and run it from the **Favorites** menu in CourtView
- Setup a Favorite in the CourtView application to be included on the Dashboard, and run it from the **Favorites** menu in Dashboard
- Use the *Prev* and *Next* buttons to move backward and forward through searches you performed during the active session in CourtView

My Favorites in CourtView

Favorites are organized by screen. First you navigate to the screen where you would enter the search criteria, add as a favorite by selecting “**Add to Favorite Searches**”, and then run it from the Favorites menu in CourtView. When you open the Favorites menu, you will see a list of searches that have been saved for the current screen. These favorite searches can be added to the “My Favorites” section of your Dashboard.

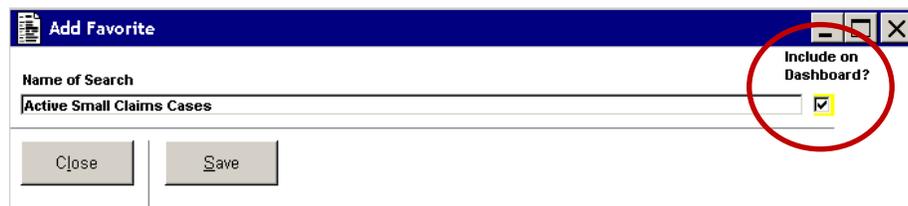
To Save Search Criteria as a Favorite in CourtView

1. Navigate to a screen in CourtView and enter the search criteria for your query.
2. On the **Favorites** menu in CourtView, click **Add to Favorite Searches**.

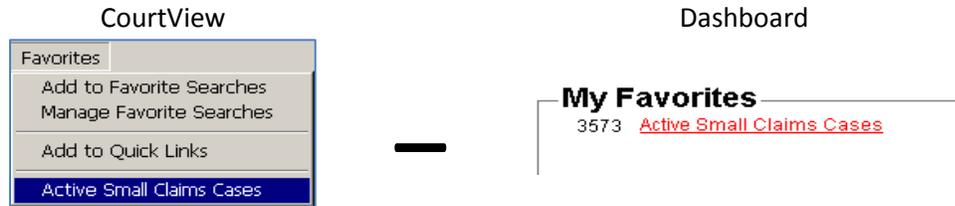


3. The Add Favorite dialogue box displays, enter Name of Search

NOTE: To add link to the “My Favorites” section of your Dashboard, place a checkmark in the “**Include on Dashboard?**” box. (Refer to the *Query Limitations* section on page 10 for information about errors you might see when you check this box.)



4. Click **Save**.
5. Your query will be saved and listed as a menu option at the bottom of the Favorites menu in CourtView. If you checked the box to include the query on the Dashboard, a link will also be added to the My Favorites section of the Dashboard. You can run the query from either place.

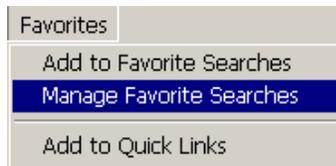


To Run a Saved Search

- Click the link in the My Favorites section of the Dashboard.
- OR-
- Navigate to the screen where you would enter the search criteria, click on **Favorites** and select the search link from the **Favorites** list in CourtView.

To Add an Existing Favorite to the Dashboard

1. Navigate to the screen where you saved the favorite search.
2. On the **Favorites** menu, select **Manage Favorite Searches**.



3. A list of favorite searches for the current screen displays.
4. Check the **Include on Dashboard?** box and click **Done**.



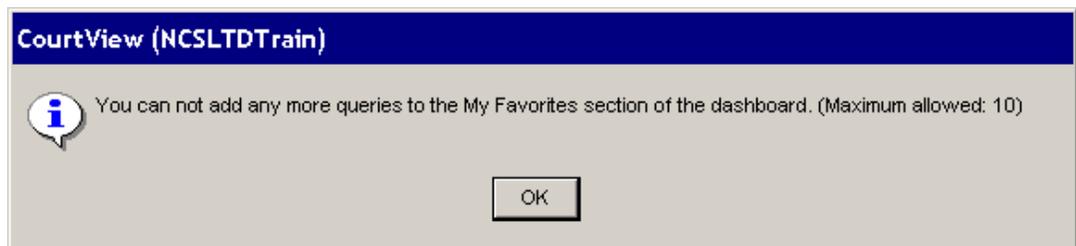
Hint:
 You can also edit the name and delete favorites from this screen. If you delete a favorite from this screen, it will also be removed from the Dashboard. If you want your Favorites to be listed on the menu in a different order, adjust the Menu Order # numbers on this screen.

Query Limitations

As soon as you check the 'Include on Dashboard?' box, CourtView runs the query to determine how long it takes to execute. If the response time is not within an acceptable time limit, you will see a message indicating that the query has exceeded the time limit and cannot be added to the Dashboard. If this happens, you can save the search criteria as a Favorite without adding it to the Dashboard, or you can narrow the search criteria so the query takes less time to execute.



You cannot add more than ten queries to the My Favorites section of the Dashboard at one time. If you attempt to add more, you will see an error message. If this happens, you can remove one of the existing My Favorite links from your Dashboard and then add the new one.

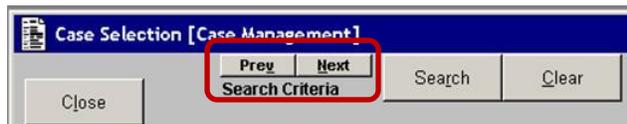


Hint: The reason for the limitation at this time is to minimize the risk of slow CourtView response time. The AOC Trial Court Technology Unit will monitor the response time and may increase or decrease these restrictions as needed.

Query History

Query History refers to the ability to scroll through searches you performed during the current CourtView session. A separate history is maintained for each screen. And your individual history resets each time you exit CourtView. Query History is only available on screens listed in the Appendix – Dashboard Enabled Screens at the end of this manual.

After you have conducted more than one search on a screen, the *Prev* button will appear on that screen. If you click *Prev*, CourtView will re-display criteria for the previous search you performed. It will also enable the *Next* button so you can move forward and backward through your recent searches. These buttons will be enabled until you exit CourtView, even if you navigate away from the screen. Click Search to refresh the results.



Note: Query History retains the 10 most recent searches.

4. My Ticklers

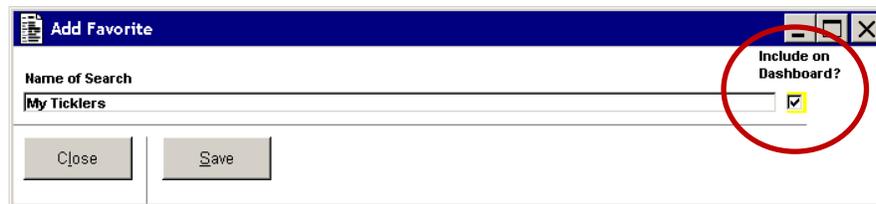
As with My Favorites, you can save selected tickler search and report screens as Favorites in CourtView and add them to the Dashboard. The My Ticklers section can help you quickly find current or upcoming due dates for cases. The My Ticklers section also includes a current record count, as well as a query limitation of 10.

To Add Tickler Queries to your Dashboard

1. Navigate to the **Tickler Report, Tickler Notice Processing** or **Tickler by User** selection screen in CourtView.
2. Enter the search or report criteria for your query.
3. On the **Favorites** menu, click **Add to Favorite Searches**.

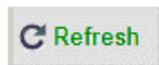
The Add Favorite dialogue box displays.

4. Enter the Name of Search and place a checkmark in the “**Include on Dashboard?**” box. (Refer to *Query Limitations* on page 10 for information about error messages you might see when you check this box.)
5. Click **Save**.



The Tickler Query is saved in the Tickler section on the Dashboard.

6. Go to the Dashboard and click the **Refresh** button.



Note: Use the right-click menu to change the name, change the order or delete Tickler queries from the Dashboard.

If you have access to the UpdateXpress plug-in then you will have the option to forward the results to the UpdateXpress screen from the Dashboard. This allows you to add the same docket, event, or tickler to all cases in the results at one time.

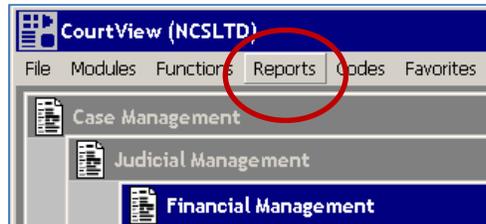
5. My Reports

My Reports is also similar to My Favorites. You can save searches for CourtView Reports as favorites in CourtView and optionally add them to the Dashboard. Clicking the link from either place runs the report with the print method you selected when you saved it as a Favorite. This section will not keep an up to the minute record count.

Note: *Any report can be stored as a Favorite in CourtView on the report screen. However, not all reports can be added to the My Reports section of the Dashboard. (For a list of Dashboard enabled reports, refer the Appendix – Dashboard Enabled Screens at the end of this manual.)*

To Add CourtView Reports to your Dashboard

1. Navigate to the Report screen in CourtView.



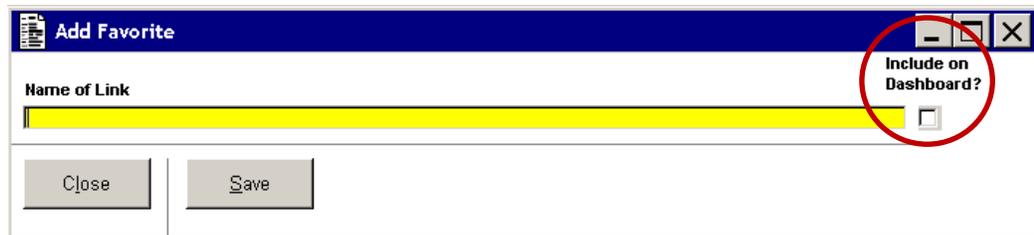
2. Enter the desired search criteria for your report query, but **do not** perform the query.

Hint: If you set the Print Method to 'Print report to a printer' then the report will run and the print dialogue box will display. If you select the 'Print to Screen' (or 'View Report on Screen') option, the results will display in the Print Preview window. You can then print the results from the preview screen if needed.

3. On the **Favorites** menu, click **Add to Favorite Searches**.

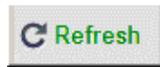
The Add Favorite dialogue box displays.

4. Enter the name for your Report and place a checkmark in the “**Include on Dashboard?**” box



5. Click **Save**.

6. Go to the Dashboard and click the **Refresh** button.



You will see the saved report in the My Reports section on the Dashboard.

Note: Use the right-click menu to change the name of a link, change the order of links in the Reports section, or delete Report links from the Dashboard.

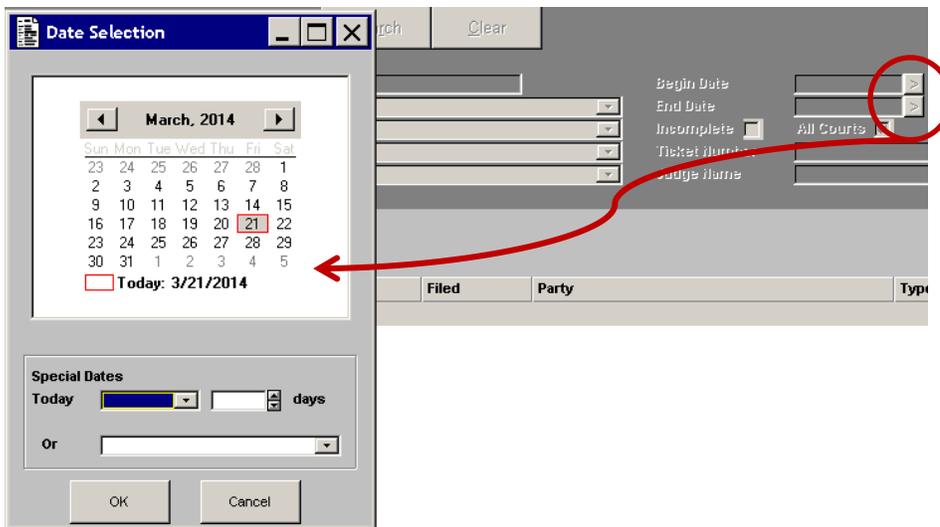
6. Tips for Selecting Dates (Calendar Widget)

The Calendar Widget is a small program imbedded in the CourtView application that allows you to select dates using a Pop-up Calendar. This tool can be used when setting up a favorite search or report to have the dashboard update the record count/data for the current date that you've logged in.

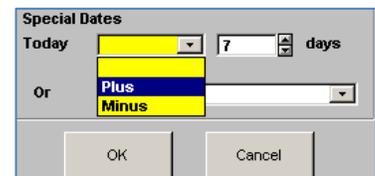
Examples include: today plus 30 days, Today minus 90 days, the Beginning of Last Week, the End of Last Year, or for the current date only Today plus 0 days.

The Calendar Widget is available on CourtView screens that allow you to enter a Begin Date and End Date. It saves time because you don't have to manually find a date on the calendar and then click it. Additionally, it also makes your My Favorites, My Ticklers, and My Reports links even more useful. Just select a date or date range relative to the current date. Then each time you use the link on your dashboard or Favorites menu to run the query or report, the dates will adjust automatically based on today's date.

To open the Calendar Widget, click the right  arrow next to a date on a search or report screen.

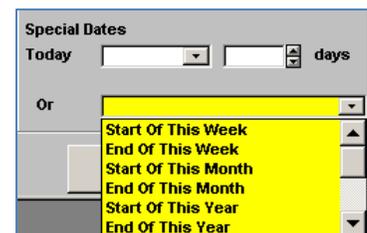


To search multiple dates surrounding today, click to open the drop down arrow next to the Today field. Select either **Plus** or **Minus** and enter the appropriate number of days in the **days** field.



OR

You can search for dates based on the beginning or ending of the current or previous week, month, or year by selecting an option from the 'Or' list.



7. FAQ - Frequently Asked Questions

How many search queries can I add to the Dashboard?

You can add up to ten (10) saved Favorites to each of the My Favorites and My Tickers sections at this time. Currently there is no limit to the number of Reports and Quick Links you can add to the dashboard.

Which screens can be added as Quick Links?

Every screen in CourtView can be added to the Dashboard as a Quick Link. However it might not be appropriate to add some screens to the Dashboard. For example, you can't add a docket entry without first selecting a case. So adding the Docket Maintenance screen as a Quick Link wouldn't make sense. Instead you would add the Case Selection screen. Think about the screens you routinely navigate to; they would be great candidates for the My Quick Links.

Which query and report screens can be added to the Dashboard?

Refer to *Appendix – Dashboard Enabled Screens*.

How do I modify existing Favorite query criteria?

Currently, Favorite queries cannot be modified. Delete the favorite and replace it with a new favorite or add another favorite to the dashboard.

I entered search criteria and added the screen to Quick Links. Why do I see a blank screen with no search criteria when I click that Quick Link on the Dashboard?

Quick links are not designed to display search results; they are designed to save keystrokes when navigating to a particular screen. If you conduct a search and then select *Add to Quick Links*, the screen will display, but it won't be populated with search criteria. If you want to save search results, refer to the My Favorites section for information about adding the search results to the dashboard. Use Quick Links to add the screens to the dashboard.

Why do I see a blank CourtView screen when I click a report link on the Dashboard?

The report or query may produce no results because no records match the criteria specified for that report or query. However, the bottom left corner of the CourtView screen will include a "No records found" message.

I started to edit the links on the Dashboard but I changed my mind and don't see a Cancel option. What do I do?

If you change your mind while editing your dashboard links, you can press the Refresh button. You'll be prompted to acknowledge that unsaved changes will be lost.

Note: If you press the ESC key while in edit mode, the Dashboard window will close.

Why doesn't the Dashboard reflect the changes I made to the menu order numbers on the Manage Favorites screen?

The two sets of sequence numbers are independent and managed separately. The menu numbers on the Manage Favorites screen control the order of Favorites on the Favorites menu. The sequence numbers on the Dashboard control the order of links on the Dashboard.

If I change a favorite name in the Manage Favorites screen, will it also change on the Dashboard?

Yes. If you rename a Favorite on the Dashboard or on the Manage Favorites screen, the changes will show on the other screen. (This helps to ensure you are working with the same link in both places when you delete favorites and add them to or remove them from the Dashboard.)

If I delete a link from the Dashboard, will it be removed from the Favorites list in CourtView?

No, however the "Include on Dashboard" box will be unchecked for that link in the Manage Favorites window.

Why is the Plug-Ins menu disabled?

The Plug-Ins menu is disabled if no modules are open. If you open one of the modules from the Modules menu and the Plug-Ins menu is still disabled, please contact the Trial Court Service desk. (Refer to contact information below.)

Why is the Dashboard menu item disabled on the Plug-In menu?

If the Plug-Ins menu enabled, but the "Launch Dashboard" menu item is disabled, the Dashboard may already be open. To make it the active window, select "CourtView Dashboard" from your taskbar. If you have multiple windows open, you may need to expand the window group to locate the Dashboard window.

What is the My Notifications area?

This section is reserved for future use.

Who do I contact for assistance with the Dashboard?

Trial Court Service Desk
(775) 687-9898
trialcourtservicesdesk@nvcourts.nv.gov

8. Appendix – Dashboard Enabled Screens

Below is a list of search and report selection screens that can be added to the Dashboard.

Accounts Receivable Functions	Screen
AR Payables Manual Check Detail	CRTS7198
A/R Notice Processing	CRTS7203
Notice Generation	CRTS6007
Accounts Receivable Selection	CRTS7180
Adult Probation Functions	
Event Notice Generation	CRTS6015
Juvenile Detention Case Selection	JDCS0110
Probation Case Selection	PRBS0110
Probation Officer Index	PRBS6505
Scheduled Events Selection	CRTS3455
Search by Substance	PRBS2327
Substance Abuse Test by Officer	PRBS2325
Tickler Notice Processing	CRTS7010
Collections Functions	Screen
Collection Selection	CRTS8645
Case Management Functions	Screen
Alert Notice Processing	CRTS7025
Case Receipting by Party	CRTS7140
Case Selection	MIJS0900
Case Selection	MIJS0901
Case Summary	CRTS3005
Case Summary	CRTS3006
ePayment Processing	EPMS7725
Forms Generation	CRTS6000
Recurring Tickler Notice Processing	CRTS7020
Service Processing/Tracking	CRTS3285
Service Processing/Tracking	CRTS3285
System Notification Message Display	CRTS7286
Tickler by User	CRTS9147
Tickler Notice Processing	CRTS7010
View Case Receipts	CRTS7134
View Non-Case Receipts	CRTS7135

Financial Management Functions	Screens
Credit Card Processing Selection (epay)	EPMS7725
Indexes	Screen
Arrest Bond	CRTS6535
Alert Index	CRTS7055
Attorney Index	CRTS6597
Prosecutor Functions	Screen
Case Selection Prosecutor Diversion	PRSS3010
Grand Jury Scheduling	PRSS2000
Prosecutor Case/File Note Selection	MIPS1072
Prosecutor Diversion Case Selection	MIPS3010
Subpoena Generation	PRSS4000
Tickler by User	CRTS9147
Tickler Notice Processing	CRTS7010
Tickler Notice Processing	CRTS7010
Reports (Module)	Screen
Account Balance Listing (Financial)	CRTP7190
Action Activity Report (Case)	CRTP5690
Alert Listing Report (Case)	CRTP9170
Bank Balance Listing (Financial)	CRTP7180
Daily Filing Report (Case)	CRTP9350
Disposition Report (Judicial)	CRTP5695
Docket Sheet Report (Case)	CRTP5925
Inactive Cases Report (Case)	MIJP3070
Itemized Bill Report (AR)	CRTP7210
Motion Tracking (Judicial)	CRTP8700
Officer Case List (Adult Probation)	PRB0900
Pending Case Inventory Report (Case)	MIJP3020
Schedule Report (Judicial)	CRTP9340
SRS Detail Report (Case)	CRTP3500
Tickler Report (Case/Judicial)	CRTP9210
Tickler Report (Case/Judicial)	CRTP9210

How to Find a Screen Number

To determine a screen number, navigate to that screen in CourtView, open the **Help** menu, and select **Program Info**. The screen number will be displayed in the bottom left corner of the screen.

