



NEVADA JUDICIAL BRANCH

TRIAL COURT TECHNOLOGY SUPPORT UNIT

**Nevada Court System
CourtView UpdateXpress
User Manual v1.1**

TRIAL COURT TECHNOLOGY SUPPORT UNIT

Nevada Court System

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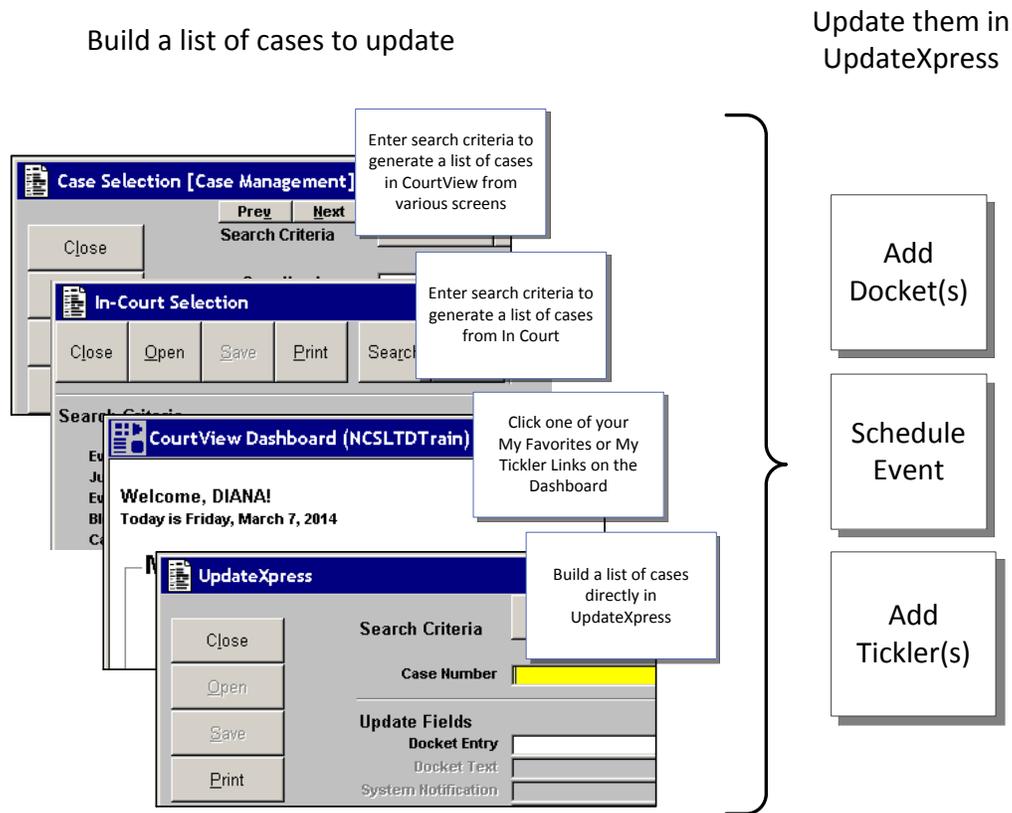
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1. Quick Start

What is UpdateXpress?

UpdateXpress is a CourtView plug-in that lets you assemble a group of cases and update them in batches or individually. You can build a list of cases from various screens in CourtView, or you can click one of your My Favorites or My Ticklers query links on the Dashboard. After you build a list, you forward it to UpdateXpress where you can add cases if you wish. Alternatively you can build a list directly in UpdateXpress by searching for and adding one case at a time or by entering a list of case numbers.

After you have a list assembled in UpdateXpress, you can add dockets, events, and/or ticklers to some or all of the cases in your list. You can also perform other case maintenance tasks on one case at a time. UpdateXpress eliminates redundant steps when you need to perform the same action for more than one case.



Overview of the UpdateXpress Screen

The screenshot shows the UpdateXpress application window. Callouts point to the following features:

- Search for and add a case to the list or enter case numbers:** Points to the Case Number input field.
- Control whether cases are removed from the list as they are updated:** Points to the 'Keep Updated Cases on Screen?' checkbox.
- Bulk update options:** Points to the 'Update Fields' section.
- Actions to perform on selected case(s):** Points to the left-hand menu.
- List of cases to update:** Points to the 'Search Results' table.
- Update status (Tool Tip details if incomplete status):** Points to the 'Update Result' column in the table.

UpdateXpress

Close Open Save Print

Search Criteria Search Clear

Case Number Case Type Code Filter All

Keep Updated Cases on Screen?

Update Fields 1 of 1

Docket Entry BENCH TRIAL HELD - CT

Docket Text BENCH TRIAL HELD -

System Notification

Message

Scheduling Manual Block

Event

Judge

Location

Date Time

Tickler Code 0 of 0

1 Add Record

2 No Ticklers

3 Case Disposition

4 Delete Record

5 Update

6 Select All

7 Deselect All

8 Case Maintenance

9 Parties

10 Docket Entries

11 No Events

Search Results 0 of 2 selected

	Case Number	Party	Type	Next Event	Status	Judge	Balance Due	Update Result
1	<input checked="" type="checkbox"/> 14 CR 09999 1C	TEST, TEST	DFNDT		0	TRA		Incomplete
2	<input type="checkbox"/> 09 PO 99999 1C	TEST, TEST	APPL		RO			Complete

Use the Case Number field to add one or more cases to the case list. If adding more than one case number, separate them with a comma “,”.

Use the Update Fields area to select which docket(s) to add, which event to schedule and which tickler(s) to create for the selected cases. (The Case Type Code Filter helps to filter the list of available choices you can make for the Docket Entry and Event fields.)

The ‘Keep Updated Cases on Screen?’ checkbox allows you to control whether successfully updated cases are removed from the list as they are updated or remain on the list and display as Complete.

You can rest the mouse pointer on the word “Incomplete” in the Update Results column to display details about why an incomplete update could not be fully executed.

The Clear button allows you to clear the Update Fields, the Search Results case list, or both.

Links on UpdateXpress Screen

Use the Dynalinks to navigate from one screen to another for cases on the [Search Results](#) list. (For example, use the **Case Maintenance** link to view information and perform maintenance on a specific case in your case list before you perform updates.) Below is a brief description of each link.

Link	Purpose	Drill down to highlighted case
Add Record Delete Record	Add and remove items in the Docket Entry, Event or Tickler fields of the Update Fields area	
Ticklers	Open the Tickler Selection screen for the highlighted case	✓
Case Disposition	Open the Case Disposition screen for the highlighted case	✓
Update	Perform the updates specified in the Update Fields area on all selected (checked) cases in the Search Results list	
Select All Deselect All	Select or deselect all cases in the Search Results case list	
Case Maintenance	Open the Maintenance screen for the highlighted case	✓
Parties	Open the Party Selection screen for the highlighted case	✓
Docket Entries	Open the Docket List screen for the highlighted case	✓
Events	Open the Event Selection screen for the highlighted case	✓

CAUTION! – Read before continuing

- Any updates you make in UpdateXpress are final. **There is no ‘Undo’ button.** For example, if you accidentally add a docket to several cases, you will have to individually delete the docket from each case because you can’t undo the bulk docket update.
- Keep in mind that dockets, events and ticklers may be configured to trigger another type of update as well. For example, if you add a docket that is configured to automatically generate a tickler, UpdateXpress will add the docket and create the tickler. Avoid duplicates by becoming familiar with how the dockets, events and ticklers are configured for your court. Contact the Trial Court Service Desk for information on your court’s docket, event and tickler setup.
- It is recommended that you work with one case type at a time. This helps to ensure the changes you make are appropriate for the case type.

2. Building a List of Cases

There are three ways to build a case list. They are listed below and described in more detail later in this section.

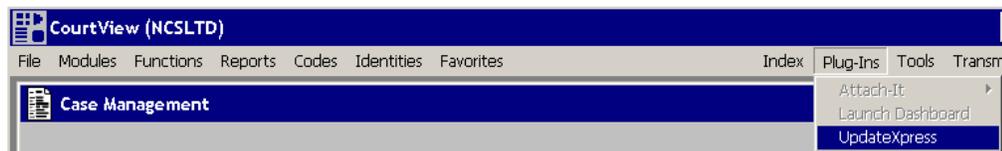
1. Select cases from various CourtView search screens, including:
 - Index screens
 - Screens in the Case Management, Judicial Management, Financial Management and Accounts Receivable Modules
 - The Tickler Report parameter screen
 - The Tickler Report List screen
2. Select cases from the In-Court search Selection screen
3. Run a favorite query from the Favorites menu in CourtView or from one of your My Favorites or My Ticklers links on the Dashboard. *(Refer to the Dashboard User Manual for more information about how to save search criteria.)*
4. Build a list directly in UpdateXpress.

Build a List in CourtView or In-Court

You can build a list of cases in CourtView or In-Court and forward them to UpdateXpress. (UpdateXpress must be able to detect case number(s) associated with records in the search results in order to forward the results to UpdateXpress.) Large lists take more time to forward to UpdateXpress and the system does not allow you to perform other tasks until it's complete.

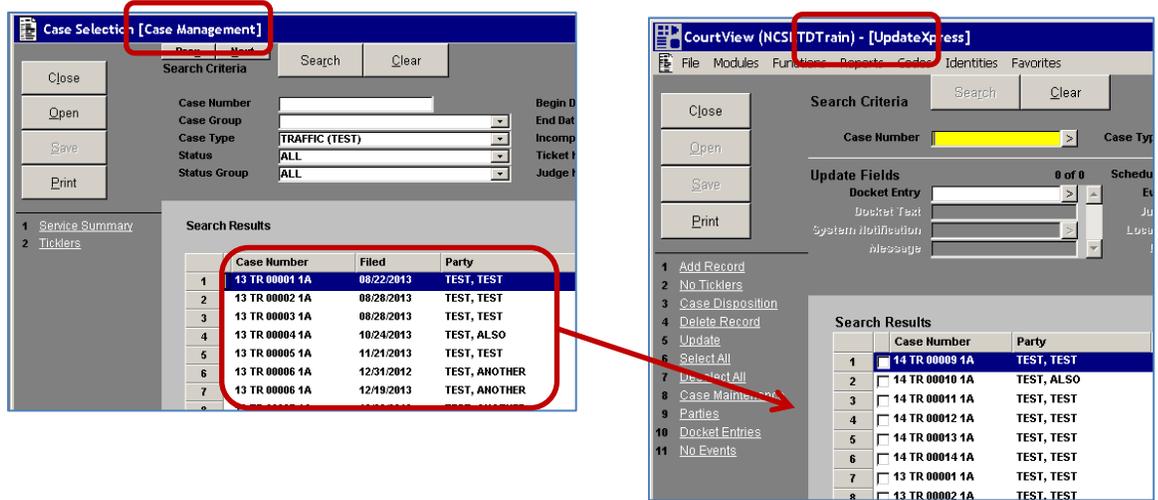
To Build a List from a Search Screen in CourtView

1. Open the **Case Management, Judicial Management, Financial Management** or **Accounts Receivable** Module.
2. Navigate to the screen where you would enter search criteria and click **Search**. You can also select a saved query from the **Favorites** menu.
3. After the search results display, select **UpdateXpress** from the **Plug-ins** menu.



Note: The Plug-Ins menu will be disabled if no CourtView Modules are open. To enable it, select one of the Modules from the Modules menu.

- The case list is forwarded to UpdateXpress and will display the same list of cases on the Search Results from CourtView.



To Build a List from In-Court

- Enter search criteria and click **Search**.
- Click the **UpdateXpress** link.
- The case list is forwarded to UpdateXpress and will display the same list of cases on the Search Results from In-Court.



To Build a List from a Saved Query

- Dashboard: Select one of your **My Favorites** or **My Tickler** query links.
CourtView: On the **Favorites** menu, select the link for a saved query.
- After the search results display, on the **Plug-ins** menu choose **UpdateXpress**.
- The case list is forwarded to UpdateXpress and will display the same list of cases listed on the saved queries.

Build a List in UpdateXpress

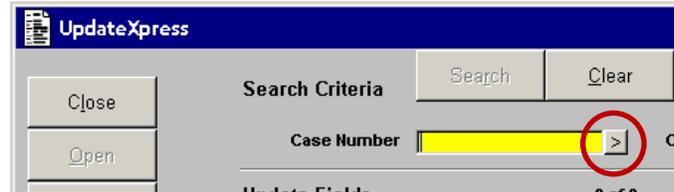
Although this section describes how to build a list from scratch in UpdateXpress, you can also follow these steps to add cases to the search results you forwarded to UpdateXpress from CourtView or In-Court. You can add cases by entering/selecting one or more case numbers in the Case number field.

1. On the **Plug-Ins** menu, select **UpdateXpress**.

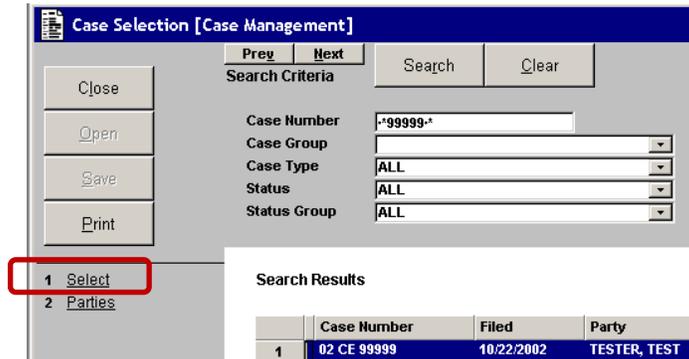


Note: The Plug-Ins menu will be disabled if no CourtView Modules are open. To enable it, select one of the Modules from the Modules menu.

2. To search for a case, click the arrow next to the Case Number field to open the Case Selection screen.



- a. Enter your search criteria and click **Search**.
- b. Highlight the case you want to add and click **Select**.



- c. The case will be added to the Search Results list on the UpdateXpress screen.

3. To enter case numbers, position the cursor in the **Case Number** field and type one or more case numbers separated by commas. (You can also copy numbers from another document and paste them in this field.)



- a. Press **Tab** to exit the Case Number field.
- b. The cases will be added to the Search Results list.

Note: If CourtView cannot find one of the case numbers you entered or if you do not have security to access the case type associated with the case, you will receive an error message that the case could not be found.

3. Applying Updates to Cases

WARNING!

Any updates you make in UpdateXpress are final. There is no 'Undo' button. For example, if you accidentally add a docket to several cases, you will have to individually remove the docket from each case because you can't undo the bulk docket update.

Keep in mind that dockets, events and ticklers may be configured to trigger another type of update as well. For example, if you add a docket that is configured to automatically create a tickler, UpdateXpress will add the docket and create the tickler. Avoid duplicates by becoming familiar with how dockets, events and ticklers are configured for your court.

It is recommended that you work with one case type at a time. This helps to ensure the changes you make are appropriate for the case type.

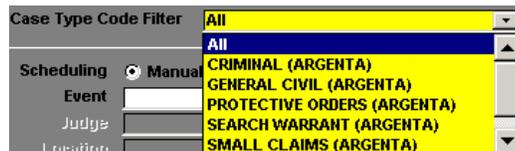
After you have a case list assembled in the Search Results area of the screen, you can start making changes to those cases.

You can add any combination of Docket(s), Event and/or Tickler(s) in UpdateXpress. You can apply one update at a time or apply several updates together. For example, you can add a docket and two ticklers to all cases and then schedule one event for some of the cases and a different event for other cases. The remainder of this section describes how to select update options, select cases to update and apply the updates.

To Select which Updates to Apply

Select Case Type

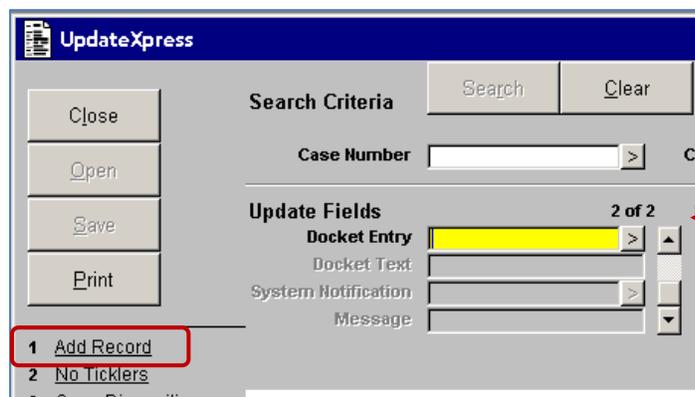
1. Click the drop down arrow in the **Case Type Code Filter** field, and select the case type that matches the cases you plan to update.



Note: Selecting a case type at this point saves time and avoids errors during the update. If you select a case type, then the Docket Entry and Event selection fields will list only those Dockets and Events that match the case type you select. If you do not select a case type, you will have to scroll through a long list of all dockets and events for all case types.

Select Docket Options

1. In the **Docket Entry** field, type the desired code and press **Tab** or click the right  arrow to open the Docket Code selection screen to select a docket.
2. In the **Docket Text** field, type the desired docket text.
The default docket text displays in the description field. You can add to or modify the existing text.
3. Skip the System Notification field. It is reserved for future use.
4. To add more than one docket, position the cursor in the **Docket Entry** field and then select the **Add Record** link to display a new row. Repeat the steps above to add a Docket. (Use the Delete Record dynalink to remove a docket from the update selections.)

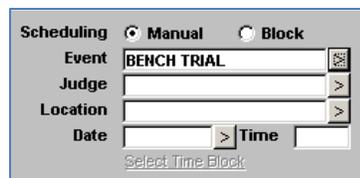


The screenshot shows the 'UpdateXpress' application window. On the left, there are buttons for 'Close', 'Open', 'Save', and 'Print'. Below these is a list with '1 Add Record' highlighted in a red box and '2 No Ticklers'. The main area is titled 'Update Fields' and contains several fields: 'Docket Entry' (highlighted in yellow), 'Docket Text', 'System Notification', and 'Message'. Each field has a dropdown arrow on its right. To the right of the 'Docket Entry' field is a scroll bar. A red arrow points from the text 'Use the scroll bar to scroll through the dockets that will be added' to this scroll bar. At the top right, there are 'Search' and 'Clear' buttons. Below the 'Update Fields' section, there are two buttons: 'Add Record' (highlighted in a red box) and 'No Ticklers'.

Use the scroll bar to scroll through the dockets that will be added

Select an Event Options

1. In the **Scheduling** section, select **Manual** if you want to manually schedule the event or **Block** if you want the system to auto-schedule.



The screenshot shows the 'Scheduling' section of the interface. It has two radio buttons: 'Manual' (which is selected) and 'Block'. Below the radio buttons are four fields: 'Event' (containing 'BENCH TRIAL'), 'Judge', 'Location', and 'Date'. To the right of the 'Date' field is a 'Time' field. Below the 'Date' and 'Time' fields is a button labeled 'Select Time Block'.

2. In the **Event** field, type the desired event code and press **Tab**, or click the right  arrow to open the Event Code Selection by Office screen and select an Event.

Manual:

- a. Enter the **Judge** name or click the right  arrow to select a judge. The system will populate the **Location** field.
- b. Enter a **Date** and **Time**.

Use military time. For example, if the event time is 1:00 p.m., enter 13:00.

Block (Auto Schedule):

- a. Select the **Block** radio button.
- b. Click the **Select Time Block** link.

- c. Check the box next to the desired date/time block, and then click the **Select** link. (For additional information about time blocks, refer to the Nevada Court System CourtView manual.)

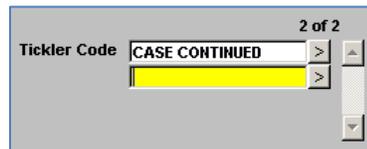
	Day	Block Date
1 <input checked="" type="checkbox"/>	Wednesday	03/12/2014
2 <input type="checkbox"/>	Wednesday	03/19/2014
3 <input type="checkbox"/>	Wednesday	03/26/2014
4 <input type="checkbox"/>	Wednesday	04/09/2014

Select a Tickler Options

1. In the **Tickler** field, enter the desired code and press **Tab**, or click the right  arrow to open the Tickler Code Selection by Office Code screen and select a tickler.

Note: Not all courts use Ticklers. Contact the Trial Court Service Desk if you would like more information about Ticklers for your court or refer to 'Chapter 2 – Ticklers' in the NCS CourtView Manual.

2. To add more than one tickler, click the **Add Record** link on the left to display a new row and add another tickler. (Use the Delete Record dynalink to remove a tickler from the update selections.)



To Apply Updates

1. Check the box next to each case you want to update with the same criteria (displayed in the Update Fields area).

		Search Results	
		Case Number	Party
<input type="checkbox"/>	1	14 CR 99999 6H	TEST, CRIMINAL
<input checked="" type="checkbox"/>	2	03 CR 99999 6H	TEST, TEST

HINT: To select all cases, click the Select All link. To clear the check marks, select Deselect All.

2. To apply your docket, event and tickler update selections, click the **Update** dynalink.

		Search Results	
		Case Number	Party
<input checked="" type="checkbox"/>	1	14 CR 99999 6H	TEST, CRIMINAL
<input checked="" type="checkbox"/>	2	03 CR 99999 6H	TEST, TEST

WARNING!

Once case records have been updated, the action cannot be undone. Through UpdateXpress there is no 'Undo' button. To make corrections you must open and manually correct each case. Be sure to review your update fields and which cases are selected before you click the Update link or OK.

3. A message displays with information about how many cases will be updated.



4. Click **OK** to continue with the update. (Click **Cancel** to change your selections.)
5. The Update Result column displays the update status as the records are updated. (If the 'Keep Updated Cases on Screen?' box at the top of the screen is unchecked, cases will be removed from the list as soon as they are updated completely with no errors.)

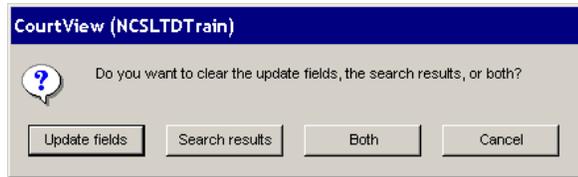
0 of 2 selected	
Balance Due	Update Result
789.00	Complete
	Incomplete

Docket entry AC not available for case type SC 6H
Added tickler: FTA 6H

Important Information about Updates

- Rest your mouse pointer over the Update Result column to display update details for each record.
- A result of 'Complete' indicates the record was updated successfully with all selected update options.
- A result of 'Incomplete' indicates that at least one of the update criteria was not valid and could not be completed. You will receive an update result of 'Incomplete' if the code you selected was not valid for the case type associated with the case you selected to update or if you attempt to schedule an event and the case already has the same event scheduled for exactly the same date and time. As shown in the example above, the tickler was created for the case, but the docket was not created because it didn't match the case type.
- If the update requires more than a several seconds to complete, you will see information about the remaining time required to update the selected records and have an opportunity to cancel remaining updates.
- If you select an option that calls a pop-up dialogue box, the pop-up box will display for each selected case.
- If the Update option you select is set up to generate other updates automatically, those updates will also occur when you click Update. For example, if a docket code is set up to add a tickler, then a docket and tickler will both be added to the selected cases.

- When selecting the Clear static button the window below will open. Select **'Update Fields'** to reset only the docket, event and tickler update options you selected. Select **'Search Results'** to remove only the cases from the list in the Search Result area. Select **'Both'** to reset everything and start over.



- To remove cases from the list as they are updated, uncheck the box 'Keep Updated Cases on Screen?' box. Only cases with complete results will be removed from the list as they are updated. Cases with incomplete results will remain on the list so you can see why they were incomplete. If you intend to perform more than one update, but not at the same time, leave this box checked so cases stay on the list until you are finished with all updates.

4. FAQ - Frequently Asked Questions

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.

Why did UpdateXpress generate two ticklers?

UpdateXpress will perform all actions associated with the Docket, Event and Tickler options you select. For example, if you select a docket and a tickler, and the docket is configured to generate a tickler, UpdateXpress will generate the docket and the tickler associated with it, as well as the tickler you selected. In this scenario, you would add two ticklers to the case with one update.

Can I undo the update?

There is no undo option. Go into each case and individually remove the docket(s), event(s) and tickler(s).

Why didn't the Delete Record link remove the highlighted case from my Search Results?

The Delete Record and Add Record link are not associated to the Search Results list. They are used to add and remove Docket, Event and Ticklers options from the Update Fields area of the screen.

Is there a way to remove a case from the Search Results list?

No, you cannot remove individual cases from the Search Results list. However, only the cases selected with the check box will be updated. Also, you can clear the entire search results list by clicking the Clear button and selecting Search Results.

Why did cases disappear from the Search Results list?

The 'Keep Updated Cases on Screen?' box is unchecked. When this box is unchecked, cases are permanently removed from the list as they are successfully updated.

Who do I contact for assistance with UpdateXpress?

Trial Court Service Desk

(775) 687-9898

trialcourtservicedesk@nvcourts.nv.gov