



CASELOAD EXPLORER

VERSION 5.3.1

FEATURES GUIDE

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## Overview

CX 5.3.1 is the culmination of some significant stabilizing changes to the CX 5 platform, but it will also house a brand new feature that will change the way some users enter their events; the [Event Series Enhancement](#). CX 5.3.1 also represents a shift in how we treat minor upgrades to Caseload Explorer. While AutoMon staff will still be performing major upgrades to Caseload Explorer, such as version 5.0 to 6.0, there is no need for manual installation when it comes to CX 5.3.1. After a series of successful deployments at remote demo sites of CX, the upgrade will be deployed via Ce Sync to all counties currently running on CX 5.3. This document will cover the features and stabilizing changes that you will be experiencing after the upgrade to CX 5.3.1.

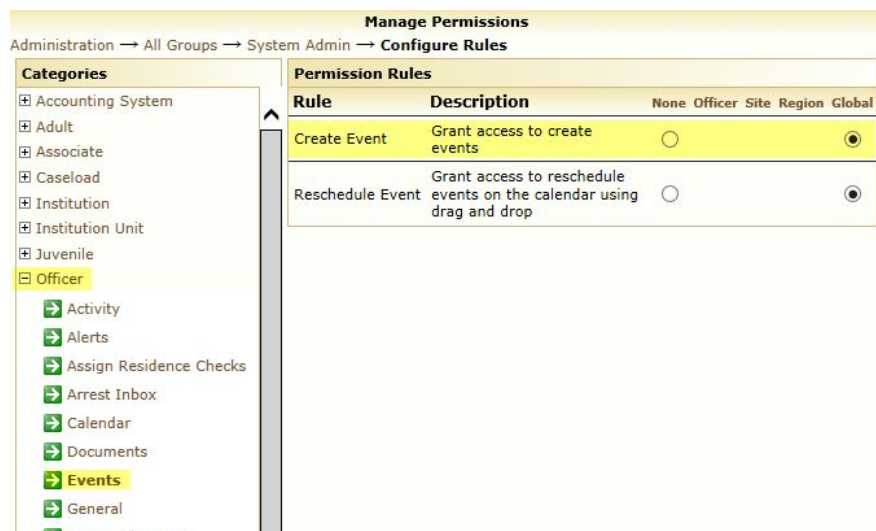
## Event Series Enhancement

Note: This feature requires an initial setup per user in order to be fully functional.

The Event Series enhancement saves both time and reduces the potential for human error when entering a series of events into Caseload Explorer in a particular order. With the Event Series enhancement, officers can now set up an event preset that will launch multiple events at one time. All events are available for these event presets including events that generate documents/reports.

## Permission

The ability to access the Event Series screen and add Event Presets is controlled by the same permission that allows access to create Events themselves:  
 Permission Group >  
 Configure Rules > Events >  
[Create Event](#)



The screenshot shows the 'Manage Permissions' interface. The breadcrumb trail is 'Administration → All Groups → System Admin → Configure Rules'. The left sidebar shows a tree view of categories, with 'Officer' selected and expanded to show sub-items like 'Activity', 'Alerts', 'Assign Residence Checks', 'Arrest Inbox', 'Calendar', 'Documents', 'Events', and 'General'. The main area displays a table of 'Permission Rules' for the 'Officer' category.

Rule	Description	None	Officer	Site	Region	Global
Create Event	Grant access to create events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Reschedule Event	Grant access to reschedule events on the calendar using drag and drop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

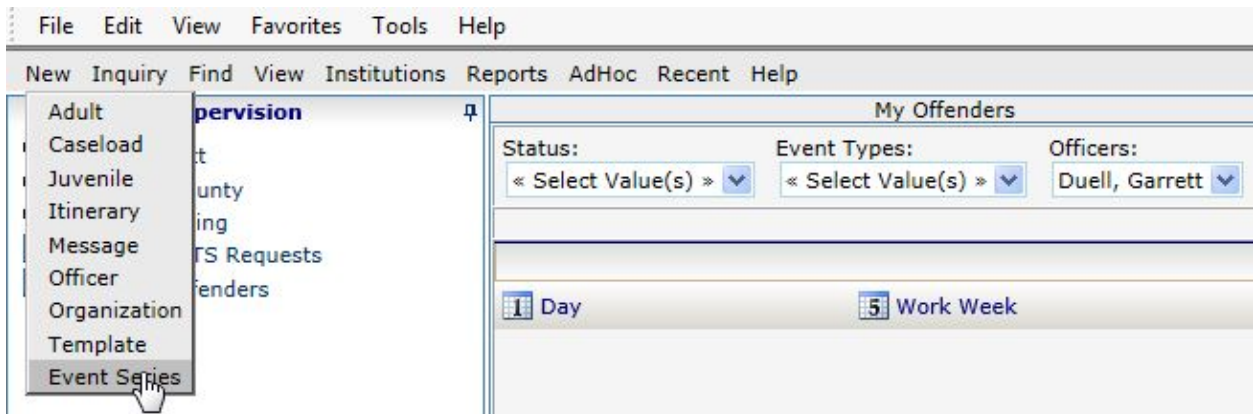
## Create a Preset

The first step to using the Event Series enhancement is to set up your presets that will house all the events you would like to launch at one time and the order in which you would like to have them launched.

Launch the Events Preset screen:

Access the new Event Series feature from one of the following places:

1. [The Caseload Explorer Home page](#), click New > Event Series



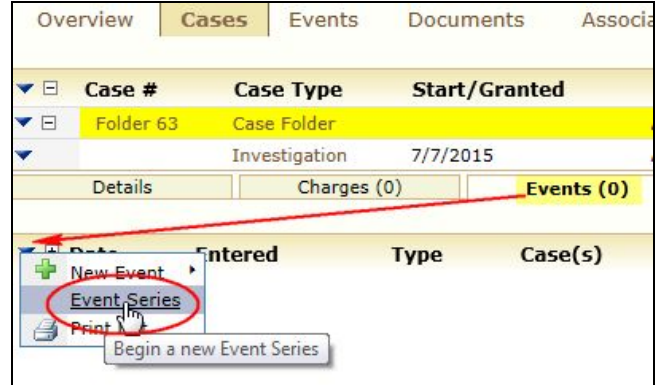
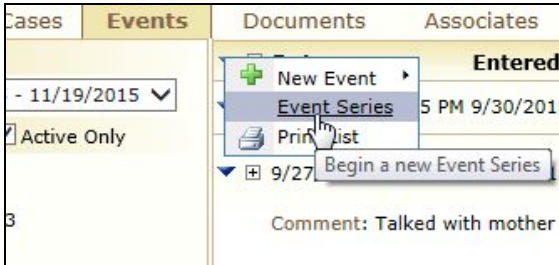
## Search for an Offender

This opens the Event Series “Select Offender” search page, where you can conduct a search for an offender, and “Select” the proper offender.

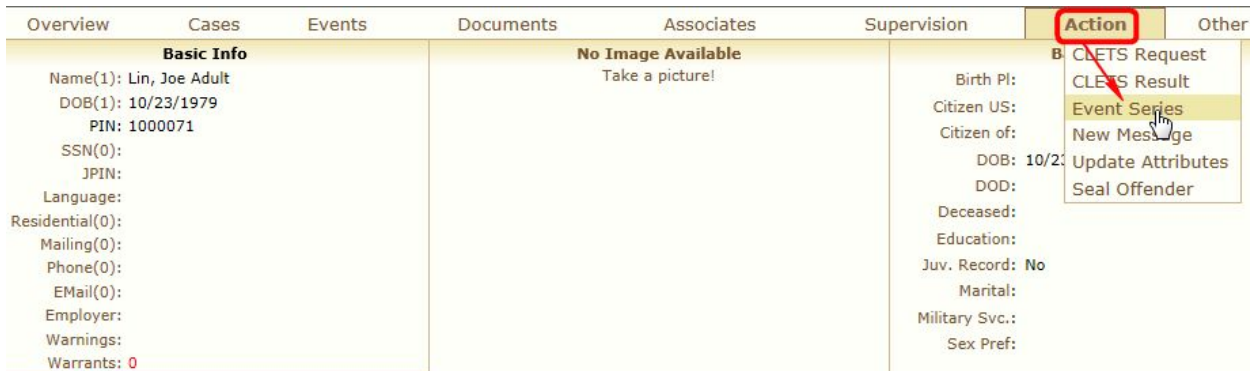
**NOTE:** The “Name” field only searches by last name.

Event Series				
Select Offender				
<b>Offender Search</b>				
PIN:	<input type="text"/>	<input type="button" value="Search"/>		
Name:	<input type="text" value="Bear"/>			
Case #:	<input type="text"/>			
You may use * and ? as wild card characters.				
	Name	Pin	Date of Birth	Caseload
Select	Bear, Bill Adult	1000000	8/1/1963	Regular Adult

2. Events - Events > Blue Arrow > Event Series **OR** Cases > select a case > go to Events > Blue Arrow



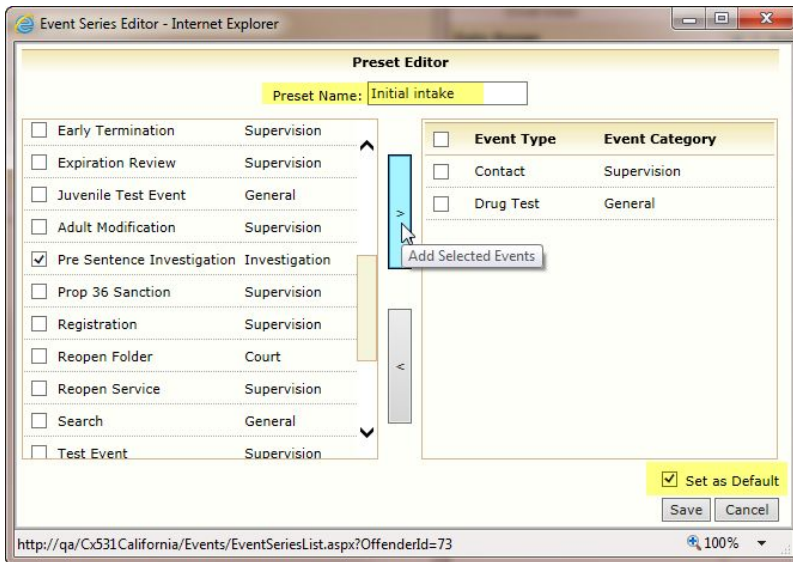
3. Overview - From the offender's overview, click Action > Event Series



This will open the Event Series preset screen. From here, you will be able to create your first Event Series preset by clicking the 'Create Preset' button.



The Preset editor screen will load and you will be able to indicate which events you would like to be a part of your new event present by checking the event checkbox on the left and clicking the center arrow to move it to the right. The events on the right are the events that will a part of this preset.



As you can see at the top, you must name your preset.

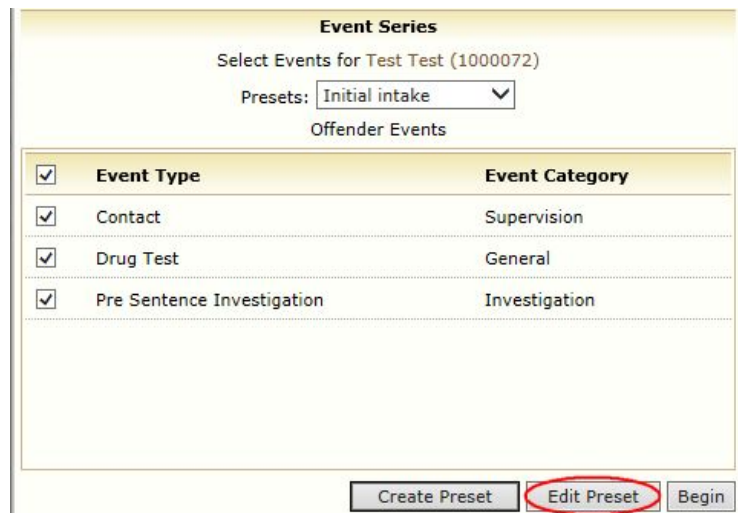
Next, bring over the Events you wish to be part of your preset.

Then, you have the option to make this preset your “default” preset, meaning it will be the first preset that loads the next time you open the preset screen.

Click ‘Save’ to save your changes.

## Edit a Preset

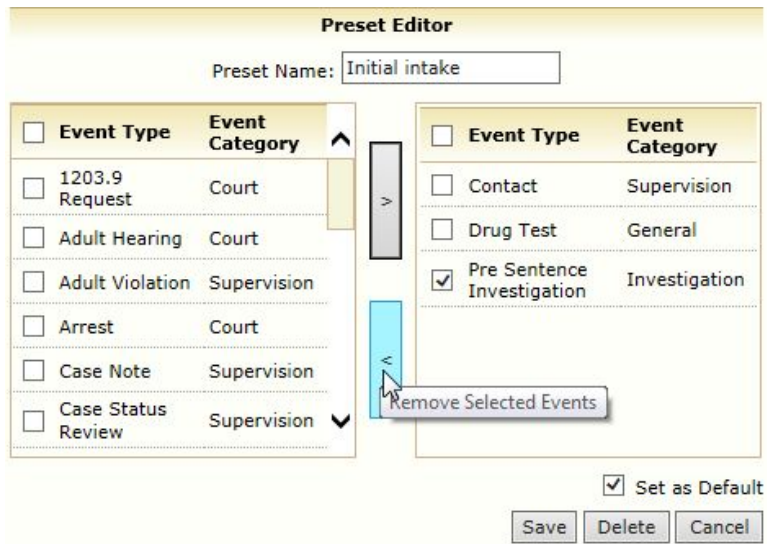
If you need to alter a preset after you’ve created it, you have the ability to do so from the Event Series screen. First, you must select your preset from the dropdown menu and then click the ‘Edit Preset’ button.



From the Preset Editor screen, you can rename the preset, add or remove events by checking their respective checkboxes and using the center arrow buttons.

You can also **drag and drop** events on the right to change the order in which they are run.

Once your changes are complete, click the 'Save' button to be taken back to the Event Series screen.



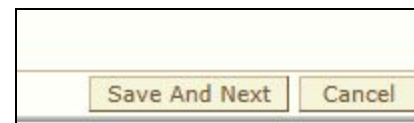
## Launch an Event Series

To begin the process of running the series of events that exist in your Event Preset, you must select your preset and click the 'Begin' button. This will open the first event.

If there are any events you do not wish to run at that time, you can uncheck those events before clicking 'Begin'.



At the bottom of each event that pops up, you will have the option to click 'Save And Next' or 'Cancel'. If you click 'Save And Next', you will be taken to the next event in your Event Series. If you click 'Cancel' at any time for any of the events, you will cancel all remaining events in the series.



## Stabilizing Changes

Issue	Description
ATTN in address	The attention line was showing when it was not called for. A fix to prevent ATTN from appearing in addresses by default has been applied. You will not have to edit existing address lines in templates to remove ATTN.
ROR state field	One county was having an issue where the State field was not being displayed on the “New ROR Wizard.” This has been fixed so that the State field will show on the wizard for all counties.
PSI Permissions	Removed duplicated permissions that were appearing in Caseload Explorer PSI signature permissions section for Juveniles and Associates.
Officer attribute: Hours Off	The “Hours Off” attribute from the officer overview page has been removed.
Legacy Social Circumstances	There were 2 social circumstances attributes being referenced in the PSI report. The old/legacy attribute has been deactivated so this will no longer be an issue.
IPRS reg # issue	This has been fixed so that no IPRS issues related to white space characters in the registration number occur going forward.
Fix to “Sequence Error” issues	This one was regarding the Activities Due feature in Caseload Explorer. If a previous activity was cancelled, then when completing certain actions in Caseload Explorer that trigger a new activity, you would get an error that stated the “sequence contained more than one element.” This bug has been fixed so that users will no longer see this error in Caseload Explorer.



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