

# 2016CTAC

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## AMANDA 7 JEMS

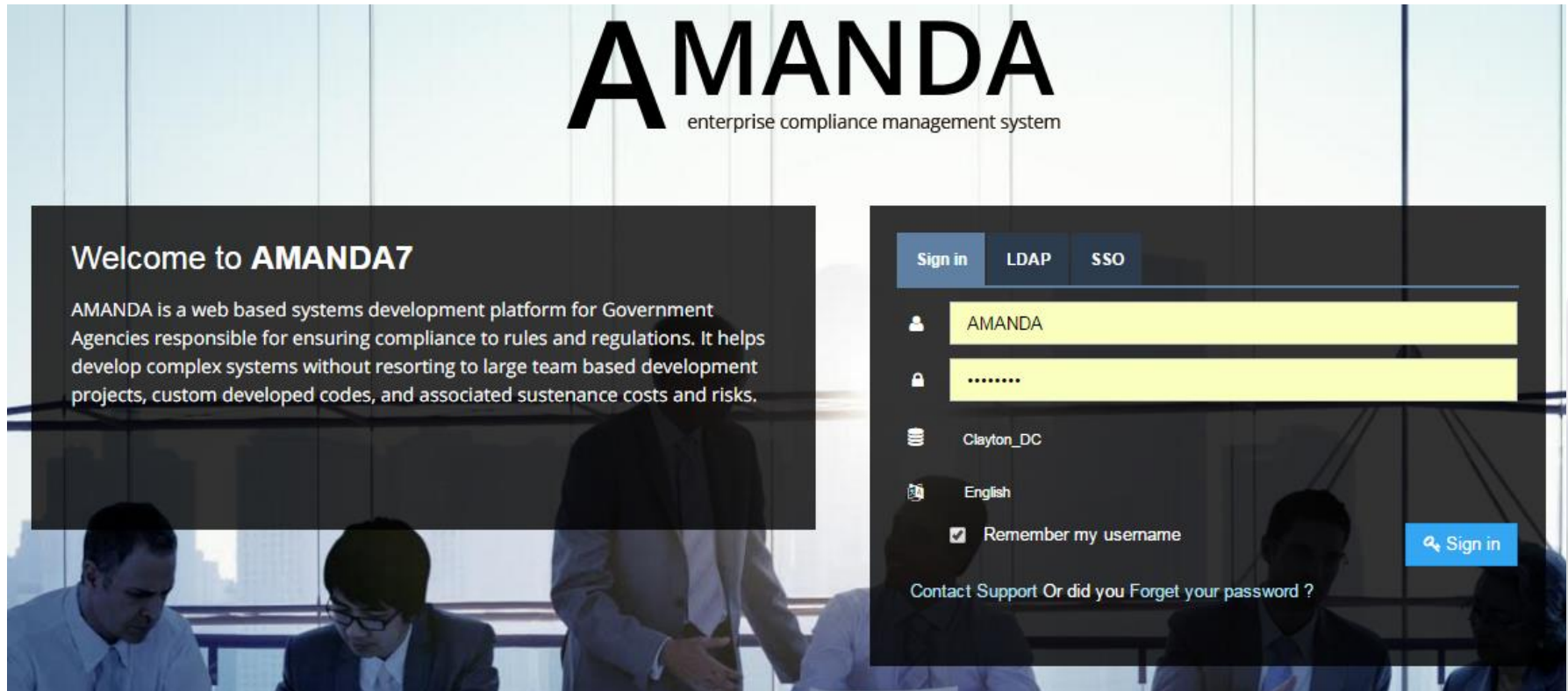
Prashanjit Choudhury  
Uday Aradhya

# AMANDA 7 JEMS Application

- Enterprise level case flow management system
- Create and manage People records
- Create and manage Case records
- Assign Actions
- Collect Fees
- Attachments and Documents
- Files management system

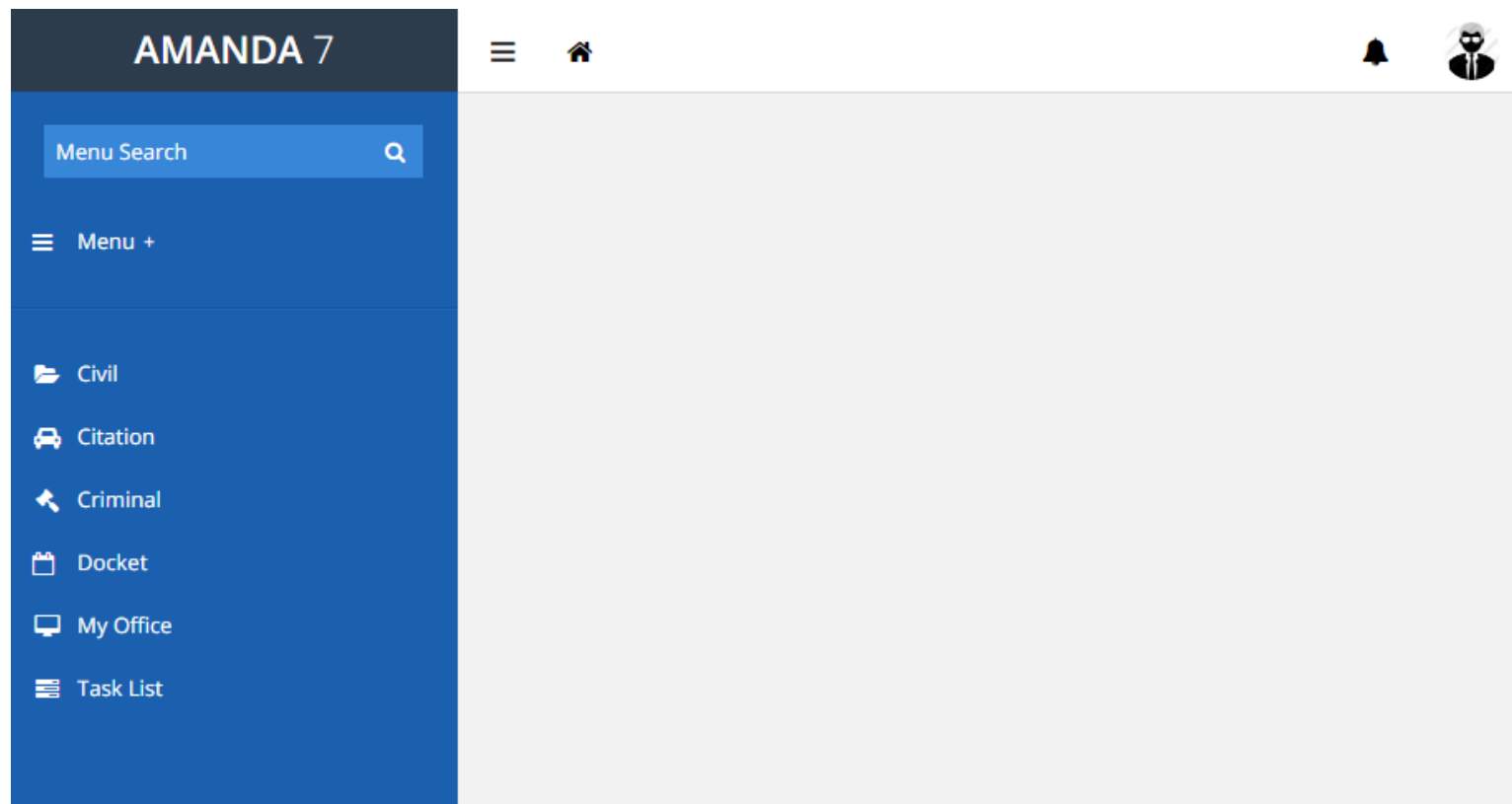
# Login to AMANDA 7

- Splash message and login information
- Background image can be configured



# Menu Bar

- Collapsible menu bar
- Tools can be personalized individually



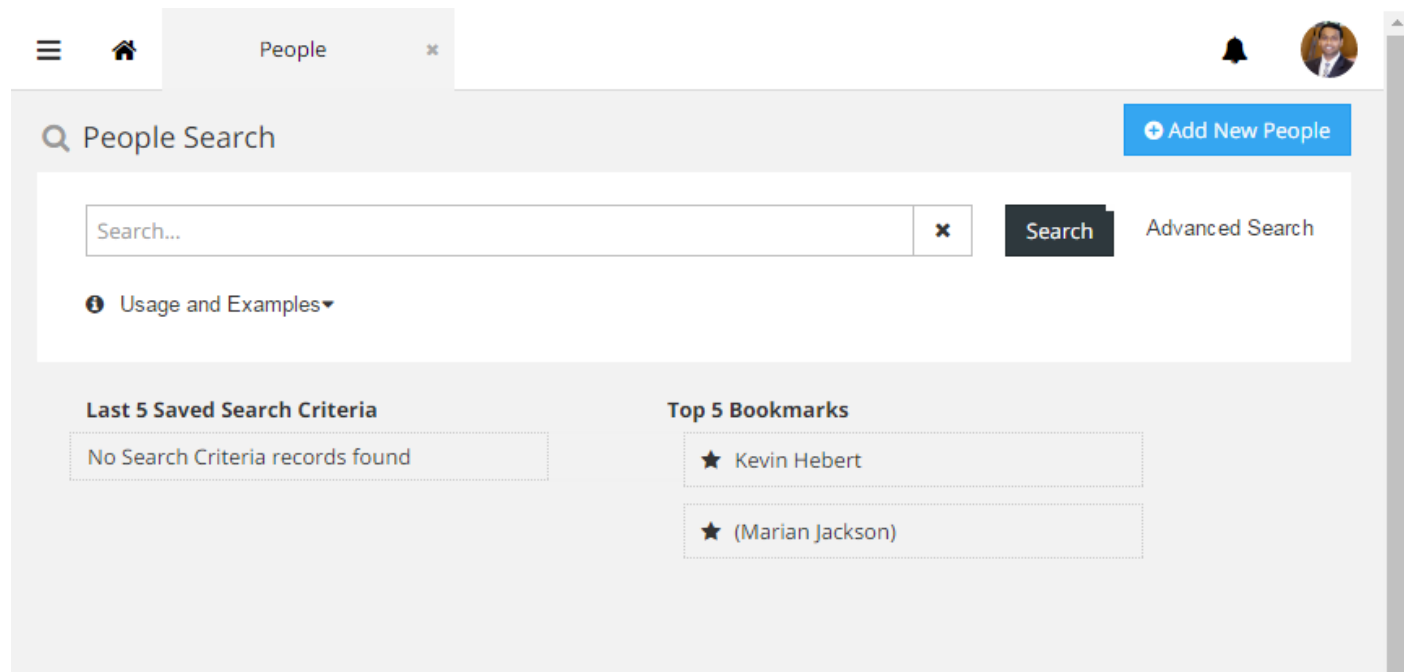
# My Office

- Search options under one umbrella – Cases, Parties, etc.
- Manage bookmarks

The screenshot displays the 'My Office' web application interface. At the top, there is a navigation bar with a home icon, a 'My Office' tab, a notification bell, and a user profile picture. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Find a Folder' and contains several search filters: 'Folder Century', 'Folder Year', and 'Folder Sequence' (each with a text input field); 'Folder Type' (a dropdown menu); 'Sub Type' (a dropdown menu) and 'Work' (a dropdown menu); 'Group' (a dropdown menu) and 'Folder RSN' (a text input field). At the bottom of this section are 'Clear' and 'Search' buttons. The right column is titled 'Find a Person or Organization' and contains fields for 'First Name' and 'Last Name' (text inputs), 'Organization' (text input), and three phone number fields ('Phone1', 'Phone2', 'Phone3'), each with a text input and a dropdown menu. At the bottom of this section are 'City' (dropdown menu) and 'Email' (text input) fields. Below the search forms, there is a section titled 'Take a Payment' with 'Bill Number' and 'Folder ID' labels.

# Create / Manage Parties

- Parties associated with different cases
- Add them if new, or retrieve them if existing
- Intuitive 'Search' capabilities



# Cases

- Query for Cases, View Query Result or Create a new Case
- Case type define majority of the business rules
- User Permissions provides appropriate rights

The screenshot displays a web application interface for a legal case. At the top, there is a navigation bar with a home icon, a hamburger menu, and the text 'Civil Case'. A breadcrumb trail shows 'IN RE: Kate Henry [ES]'. On the right side of the header, there are notification and user profile icons.

Below the header, a secondary navigation bar lists various case components: 'Folder | Parties(2) | Action(13) | Fee(8) | Info(10) | Attachment(9) | Document | File(5) | Comment | Correspondence(8) | Process Select'. The main case title is '2016-0799 Estates' with a 'Pending' status indicator. To the right of the title are 'Edit' and 'Options' buttons.

The main content area is divided into two columns. The left column is titled 'General' and contains the following fields:

Name	Sub Type
IN RE: Kate Henry	Permanent Admin(7)
Judge	Status
	Pending
Disposed On	Disposition
	Judgment
Secured / Sealed <input type="checkbox"/>	

The right column is titled 'Tracking Dates and Reference' and contains the following fields:

Filed On	Closed Date	Archive Date
8/8/2016		
Reference Number	Reference Number 2	
Parent ID	Folder RSN #	15719

Below these columns is a 'Party' section with a table listing the parties involved in the case:

Name	DOB	Address	Phone#
Kate Henry Deceased	1/1/2001	Riverdale GA 30274	
Albert C Henry Jr Petitioner	1/1/2001	Riverdale GA 30274	

# Adding more Parties to Cases

- Any number of Parties can be associated with Cases
- Roles are defined when Parties are added
- Jump to full details about the Party from here

The screenshot displays a web application interface for a legal case. At the top, the breadcrumb navigation shows 'Civil Case' and 'IN RE: Kate Henry [ES]'. Below this, a folder path '2016-0799 Estates' is shown with a 'Pending' status and an 'Options' button. The main content area is divided into two sections: 'Associated Party' and 'Activities'. Under 'Associated Party', two parties are listed: 'Kate Henry Deceased' and 'Albert C Henry... Petitioner'. The 'Kate Henry' party is selected, and its details are shown in a form. The form includes a 'Person Role\*' dropdown menu set to 'Deceased', a 'Secured' checkbox, and a 'Print' icon. The form fields are: 'People ID' (82082), 'DOB' (1/1/2001), 'Address' (Riverdale GA 30274), 'Telephone', 'Ethnicity', 'Gender', 'Driver Licence No', 'Driver Licence State', 'From Date', and 'To Date'. Below the form is an 'Arrest Info' section with checkboxes for 'In Jail' and 'Local Resident', a dropdown for 'Observed Or Investigated', a dropdown for 'Jail Location', and date pickers for 'Arrest Date' and 'Release Date'. A 'Save' button is located at the bottom right of the form.

Civil Case IN RE: Kate Henry [ES]

Folder | Parties(2) | Action(13) | Fee(8) | Info(10) | Attachment(9) | Document | File(5) | Comment | Correspondence(8) | Process Select

2016-0799 Estates Pending Options

Associated Party Activities

Kate Henry Deceased

Albert C Henry... Petitioner

**Kate Henry**  Secured  Print

Person Role\*  People ID 82082 DOB 1/1/2001 Address Riverdale GA 30274

Telephone Ethnicity Gender Driver Licence No

Driver Licence State From Date To Date

Arrest Info

In Jail  Local Resident Observed Or Investigated  Jail Location

Arrest Date  Release Date

Save



# Info Tab

- Additional information about a case is captured here
- List of Info fields depends on the type of case being created

1 Case Detail > 2 Party > 3 Info

2016-00006200000ES Estates Active

[Collapse All Sections](#) [Edit](#) [Options](#)

Description	Value	Options
- Ungrouped Info Fields (3)		
Date of Will		
Date of Codicil		
Date of Death		

[Cancel](#) [Save & Proceed](#)


# Fees and Payments

- Fees are mostly automatically by the application
- Manual addition depends on the User Permissions
- Tombstone data provides a summarized view
- Separate sections to manage Unbilled Fees, Billed Fees and Payments

Billed Balance Due	Unbilled	Total Outstanding	Total Paid
0.00	10.00	10.00	10.00

## Unbilled Fees

<input type="checkbox"/>	Fee Code	Fee Description	Notes	Unit Price	Quantity	Fee Amount	Priority
<input type="checkbox"/>	1	Accounting and Set	Comment	10.00	1	10.00	100

 [+ Create New Bill With Selected Fees](#) [+ Add New Fee ▾](#)

[Save](#)

# Fees and Payments

- Bills can be printed or voided/cancelled
- Multiple fees under one Bill is possible

Billed Balance Due	Unbilled	Total Outstanding	Total Paid
10.00	0.00	10.00	10.00

### Unbilled Fees

+ Add New Fee ▾

### Billed Fees

Fee Code	Fee Description	Notes	Fee Amount	Due Amount	Paid Amount	Paid?
▾ Bill #16600 <span style="margin-left: 10px;">⚙ Options ▾</span> <span style="margin-left: 10px; color: green; font-weight: bold; border: 1px solid green; border-radius: 5px; padding: 2px;">Paid</span>				Date generated: 5/9/2016	Due Date:	
1	Accounting and Settlement		10.00	0.00	10.00	☑
▾ Bill #16685 <span style="margin-left: 10px;">⚙ Options ▾</span> <span style="margin-left: 10px; color: red; font-weight: bold;">Outstanding Balance: 10.00</span>				Date generated: 9/21/2016	Due Date:	
1	Accounting and Settlement		10.00	10.00	0.00	
			<b>20.00</b>	<b>10.00</b>	<b>10.00</b>	

# Documents...

- Documents are automatically or manually inserted into Actions
- They are generated with the most recent data from the Case

The screenshot displays a web interface for a legal case titled "2016-00006200000ES Estates" with an "Active" status. A "Back To List" button is visible. The interface is divided into sections: "Document (1)", "Estate Minor Hearing Ltr" (with a document icon), and "Filing (1)". A tabbed menu at the top includes "General", "Attachment", "Comments", and "Document". A table lists documents with columns for "DocumentRSN", "Document Type", "Generated Date", "Sent", "Due", and "Status". The table shows one document with RSN "231" and type "Estate Minor Hearing Ltr". A context menu is open over the table, listing actions: "Edit", "Delete", "Generate Now" (highlighted with a red box), "View", "Change Agency", "Send To", "Copy From/To", and "Reply Accepted".

DocumentRSN	Document Type	Generated Date	Sent	Due	Status
- Ungrouped Documents (1)					
231	Estate Minor Hearing Ltr				

# ...Documents

- Variables can be set by the Users before the Documents are generated

The screenshot shows a web interface titled "Document Variables". It contains a table with 10 rows, each representing a variable and its corresponding value. The values are all set to "<Your Name>". A brown rectangular box highlights the entire table area. Below the table, there are two buttons: "Generate Now" and "Cancel". The "Generate Now" button is also highlighted with a brown rectangular box.

Document Variables	
Initial if Ltr of Admin	<Your Name>
Initial if Temp Ltr of Admin	<Your Name>
Initial if Order Dec No Admin Nec	<Your Name>
Initial if Year's Support	<Your Name>
Initial if pet is incomplete	<Your Name>
Initial if pet not signed or verified	<Your Name>
Initial if no definite stmt of heirs	<Your Name>
Initial if no info on real property	<Your Name>
Initial if no estate debts included	<Your Name>
Initial if Other	<Your Name>

Generate Now Cancel

# Attachments

- Multiple options to upload attachments
  - Scan
  - Browse
  - Drag & Drop

File\*

File

Or

↓  
Drop your files to upload here.

Scan X

Attachment Type

Description

Detail

Scan Preference

Output Type  
 BW  Gray  Color

Document Output Mode  
 Single Page  Multiple Page  Batch

Show Preview  ADF  Duplex

Remove Blank

Device Setup\*

File Type\*  
PDF

Scan File Name\*

Resolution  
Please select a scanner

# Actions

- All the activities related to a Case
- Actions can be assigned to Users or Teams
- Has Schedule Dates and Status

General Attachment

[Attempts](#) [+Attempt](#) [Checklist](#) [Process Info](#) Options ▾

Certified Copy Form (57) Open

Team	Assigned User	Baseline Start Date	Baseline End Date
<input style="width: 100%;" type="text" value="Team"/>	<input style="width: 100%;" type="text" value="Lawson"/>		

To Start	To End	Sign Off User	Discipline
<input style="width: 100%;" type="text" value="9/21/2016 15:34"/>	<input style="width: 100%;" type="text" value="9/23/2016 15:34"/>	<input style="width: 100%;" type="text" value="Sign Off User"/>	Document

Started	Ended	Comments <input style="width: 100%;" type="text" value="Comments go here"/>
<input style="width: 100%;" type="text" value="Started"/>	<input style="width: 100%;" type="text" value="Ended"/>	

Reference	People
<input style="width: 100%;" type="text" value="Reference"/>	<input style="width: 100%;" type="text"/>

# Task List

- Actions are listed in the Task List for easy notification
- Perform Bulk Actions
- View Team's and Other's tasks

My Tasks | Un-Scheduled Tasks | Team Tasks | Comments | Documents | Others' Tasks

My Tasks List View Calendar View

Options

Scheduled Start Date:

<input type="checkbox"/> IsPaused	Folder Number	Folder Type	Sub Type	P.Priority	F.P.	Folder Name	Process Comment	Process	Status
<input type="checkbox"/>	2016 000006 000 00 FL	FL		<input type="text"/>				Certified Copy Further Form	In Progr
<input type="checkbox"/>	2016000002000000WAR	WAR	Arrest warrant	<input type="text"/>	/	29072		Arrest Process	[10]



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Thank you! Questions?