

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

Event Review Report
Standard Operating Procedure
Version 1.0
Updated: (05/2017)

Event Review Report

COURT / DEPARTMENT / DIVISION

District, Magistrate and Metropolitan Court

USER

Judges, Clerks or TCAA's

PURPOSE

To monitor a list of cases for which there are events scheduled to be reviewed for a specific date range

INTRODUCTION

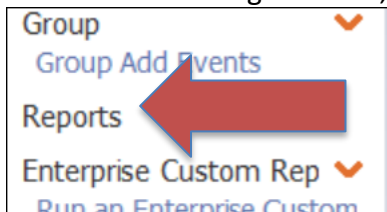
This procedure describes generating a list of cases that include an Event Due for the upcoming week (or specified time period); and creating a List in List Manager to efficiently review those cases and events. This procedure also describes how to schedule the report to run on a recurring basis.

NAVIGATION

Reports / Case Management / Event Review

STEPS

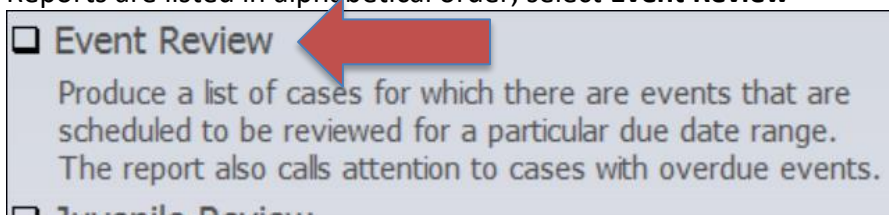
1. From the Left Navigation bar, select **Reports**










2. From Case Manager Reporting Center, select **Case Management**





3. Reports are listed in alphabetical order, select **Event Review**

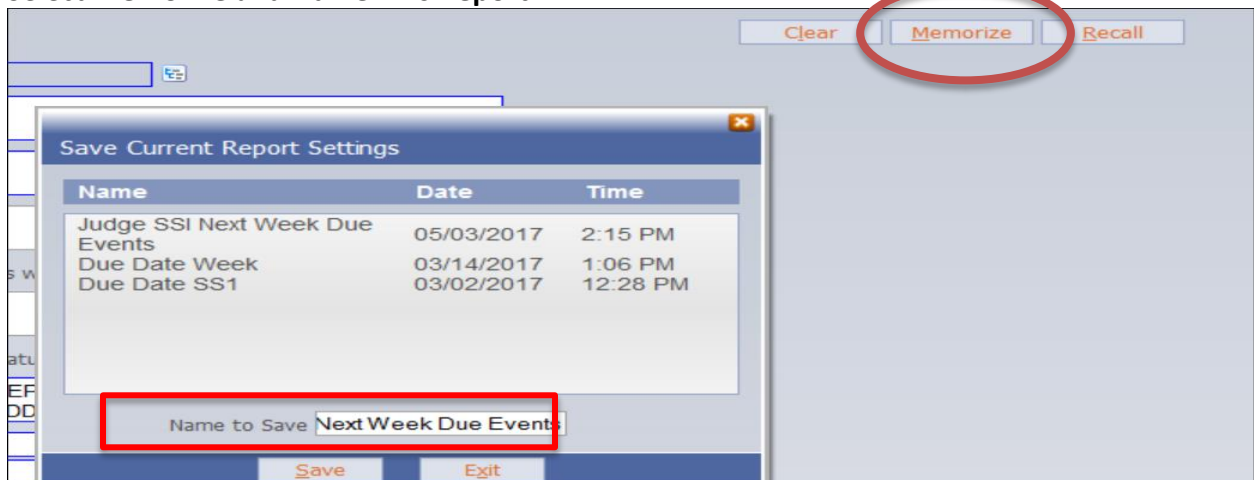


4. Complete the data fields as indicated below:

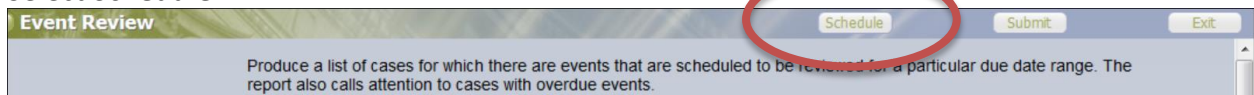
Field Name	Field Description
Locations	Click  to select the locations that contain the data for the activity. Select your Court Location
Case Categories	Type the case category codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Select All or Select Options: Civil – Criminal – Family – Probate or Mental Health (Based on Judge Assignment)
Case Types	Type the case type codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Select All or Select Option from Picker Box (Based on Judge Assignment)
Case Subtypes	Type the case subtype codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Leave Blank
Case Status	Type the case status codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Select All, then Unselect any closed or inactive cases
Event Types	Type the event type codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Select All (This will include all DUE events and other events that have a due date entered) (Any specific events can be unselected)
Scheduled Review Date	Enter dates in the Start Date and End Date fields to specify a date range for the activity. <i>This example will generate data for the upcoming work week and will be scheduled to run the Friday prior to be available for the Judge by email first thing Monday morning of each week.)</i> Start Date = mon End Date = fri
Sort Order	Select how you want the items to be listed on the report. Select Event Due Date, Case Number
Security Groups	Type the security group codes to include in the activity. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Leave Blank

Field Name	Field Description
Case Judicial Officers	Type the codes for the judicial officer assigned to the case. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Select the Judge for which you are running this report
Event Judicial Officers	Type the codes for the judicial officer assigned to the event. Separate each code with a comma or semicolon. Type All to include all available codes. Click  or press F4 to search for and select multiple codes. Leave Blank
Case Hearing Officer	Leave Blank
List Name	Type a name in this field if you want to save the data in the report as a list in List Manager. After you generate the report, you can then access List Manager to view the list. If the list name you entered already exists for your used ID, the report output will overwrite the existing list.
Append Job ID Number to List Name	Check this box. When this check box is selected, the job ID number is added to the list name entered in the List Name field. If the List Name field is left blank, the Append Job ID Number to List Name check box is unavailable.

5. Select **Memorize** and **Name This Report**



6. Select **Schedule**



7. Add the **Start Date and Start Time**, enter comments, if desired, click on the **RECURRENCE** option; Select **Save**

Add Job Schedule Entry

Job Definition

Job Definition: **Report Job**

Description: **Event Review**

Start Date: **05/05/2017** Start Time: **9:00 PM**

Comment: Start date is Friday prior to the week of report data for this example.

Save **Exit**

8. Complete the **Add Job Recurrence Information**: Select **Save**

Add Job Recurrence

Job Definition: **Report Job**

Description: **Event Review**

Comment: Start date is Friday prior to the week of report data for this example. To recur weekly.

Recurrence

Start Time: **9:00 PM**

How often does this job recur?

Hourly

Daily

Weekly

Monthly

Yearly

Recur every **1** week(s)

Monday Tuesday Wednesday Friday Saturday Sunday

When does this recurrence start and end?

Start Date: **05/05/2017**

No end date

End after: **10** occurrences

End by: **07/14/2017**

What is the approach for job sequencing on this recurrence?

Run recurring job as configured

Do not start next recurrence of job until the current job in this job definition has completed processing

Do not start next recurrence of job until the following jobs have completed processing

Job Definitions:

Save **Exit**

9. Enter **Email Addresses** for completed report to be emailed to each week

Add Email Notification Recipients

To: **enter Judge - TCAA email address**

Cc:

Bcc:

Comment:

Attach Any Files Generated by Job

Attach Any Files Generated by Job and Keep Files in Job History

Copy Job Files to Directory

Directory:

Cancel **Finish**

- Completed Report will be emailed each week to recipients. The generated data will also be delivered to the List Manager of the person creating the report. The list can also be copied to another user by selecting the **Copy** option, if desired.



- Enter the **User ID** of the person to copy; select **Save**

