

STATE COURT ADMINISTRATIVE OFFICE

COUNSEL APPOINTMENT SYSTEM

USER GUIDE AND SPECIFICATION

VERSION: Final

DECEMBER 21, 2005

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1 Introduction

This User Guide and Specification was created by the State Court Administrative Office (SCAO) for the Counsel Appointment System (CAS). It is intended to document the functionality of the web application for end users and application programmers. This document lists each screen and describes its intent and navigation mechanisms, as well as what each data field represents and how it is to be used. In addition, it includes instructions for viewing and using the output reports.

Between January 1 and February 15 of each year at least one authorized user from each court will have access to the Counsel Appointment System to submit data related to attorneys paid during the previous calendar year. To access and use this application, the person must be selected by the court administrator or chief judge, registered with SCAO, and in possession of an SCAO-issued username and password. The usernames and passwords are confidential and should be securely stored.

To add a person or replace a person as the authorized user of the Counsel Appointment System for your court, log into the User Maintenance screens on the Michigan Court Application Portal (MCAP). For additional assistance, contact Lili Marchlewicz at (517) 373-5538 or marchlewiczl@courts.mi.gov.

2 Software Application Screens

2.1 Menu



Figure 1: Menu

2.1.1 Usage

The menu screen provides links to all other areas of the application along with a description of each area. Click on the underlined text to proceed to the desired section. The Appointment Verification option will be available between January 1 and February 15 of each year.

2.2 Court/Year Data Entry



Figure 2: Court/Year Data Entry

2.2.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court. In selecting a court from the drop-down list, keep in mind that only one report can be submitted for each court or unified trial court. Multi-county courts, however, should submit separate reports; one for each county. Tab to or click on the Year field to change the year. Pressing the Enter key or clicking the Continue button will proceed to the next screen.

2.2.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may enter data for.	Required. As the user types, the selection will move to the court that matches the keys typed.
Year	Accepts a 4-digit year.	Required. The previous year is displayed by default, however the user is able to enter any year between 2004 and the previous year (i.e. In 2007, the user may enter any year between 2004 and 2006).
Continue Button	Proceeds to the next screen using the court and year values entered.	Triggered by pressing the Enter key or clicking the button.

2.3 Counsel Appointment Data Entry

Counsel Appointment System - Appointment Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Michigan Court Application Portal

Counsel Appointment System

Welcome, CAS Tester

Logout

Applications Options Verification Utilities

Counsel Appointment Data Entry

Data Entry - Add a new record to the Counsel Appointment System

Filter - Enter criteria to define what records are displayed in the table below

Court: C11 - Luce Year: 2005

Line	Attorney P No	Attorney Name	Attorney Group	Amount Paid
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Submit

Show Records

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Local intranet

Figure 3: Counsel Appointment Data Entry

2.3.1 Usage

Add a Record:

Note: Data entry is available from January 1 through February 15 of each year. Select the Data Entry radio button if it is not already selected. Enter the attorney's p number using numbers only, or tab again to the Attorney Group list and type, arrow up or down, or click on a group name. Then tab to the Amount Paid field and enter the dollar amount paid to this attorney or attorney group by this court regardless of when the appointment was made or when the work was performed. Payments made to attorneys or attorney groups for family division

cases should be reported in the Circuit Court reports. Keep pressing tab to the next line to enter more data. Pressing the Enter key or clicking the Submit button will add the records to the database. There will be a message indicating the number of records entered. If an error message is displayed, you will not be able to save the data until the record with the errors has been fixed or removed.

Edit or Delete a Record:

If a record needs to be edited or deleted, follow the instructions for filtering records to locate a record to be edited or deleted. Click the Edit button to the left of the record and then enter the new amount paid. When finished, click Save to keep the changes, or Cancel to discard the changes. To delete a record click the Delete button to the left of the record. When prompted, click OK to confirm the delete or Cancel to keep the record.

Filter Records:

Select the Filter radio button if is not already selected. Enter the attorney's p number using numbers only, or tab to the Attorney Group list and select a group name. At least one field must be entered. Pressing the Enter key or clicking the Filter button will search for records matching the criteria entered and display them in the table.

Counsel Appointment System - Appointment Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Michigan Court Application Portal

Counsel Appointment System

Welcome, CAS Tester Logout

Applications Options Verification Utilities

Counsel Appointment Data Entry

Data Entry - Add a new record to the Counsel Appointment System

Filter - Enter criteria to define what records are displayed in the table below

Court: C11 - Luce Year: 2005

Attorney P No: 44446 Miller, Jeanmarie OR Attorney Group: [Dropdown]

Filter

Hide Records

	Attorney / Group	Amount Paid
Edit Delete	Jeanmarie Miller	\$5,000

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Done Local intranet

2.3.2 Screen Element Descriptions and Usage

Name	Description	Usage
Data Entry	Allows the user to enter new counsel appointment data.	Displays the full set of data entry fields and moves the cursor to the Attorney P No field.
Filter	Allows the user to enter criteria and perform a search for matching records.	Displays only the Judge P No, Attorney P No, and Attorney Group fields and moves the cursor to the Judge P No field.
Attorney P No ^{1,2}	Allows the user to enter 0 or the attorney's 5-digit p number.	Accepts only 5-digit numbers for valid attorneys or 0. When the user tabs or clicks off this field the attorney's name is displayed below.
Attorney Group ^{1,2}	Lists the attorney groups for the court.	As the user types, the selection will move to the group that matches the keys typed.
Amount Paid ³	Allows the user to enter the amount paid.	Accepts a number between 0 and 999999.
Submit Button	Saves the record to the database and displays it in the table.	Displayed for data entry and triggered by pressing the Enter key or clicking the button.
Filter Button	Performs a search for records matching the criteria entered.	Displayed when the filter is on and triggered by pressing the Enter key or clicking the button.
Edit Button	Allows the user to modify the appointments and/or amount paid for a single record.	Displays the Save and Cancel buttons, as well as the Appointments and Amount Paid text fields for the record.
Save Button	Saves the modifications to the database.	Hides the Save and Cancel buttons, and updates the record in the table.
Cancel Button	Discards any modifications made to the record.	Hides the Save and Cancel buttons, and returns record to its previous state.
Delete Button	Deletes the record from the database.	Prompts the user to confirm the deletion and then removes the record from the table.

¹One of these fields must be entered when using the filter feature: Attorney P No OR Attorney Group; however both Attorney P No and Attorney Group cannot be entered at the same time.

²Attorney P No or Attorney Group must be entered when adding a record; however both cannot be entered at the same time.

³Either Appointments or Amount Paid may be left blank when entering data; however a value must be entered at some point before the deadline or the court will not be able to submit a Counsel Appointment Verification form.

2.4 Upload Data Files

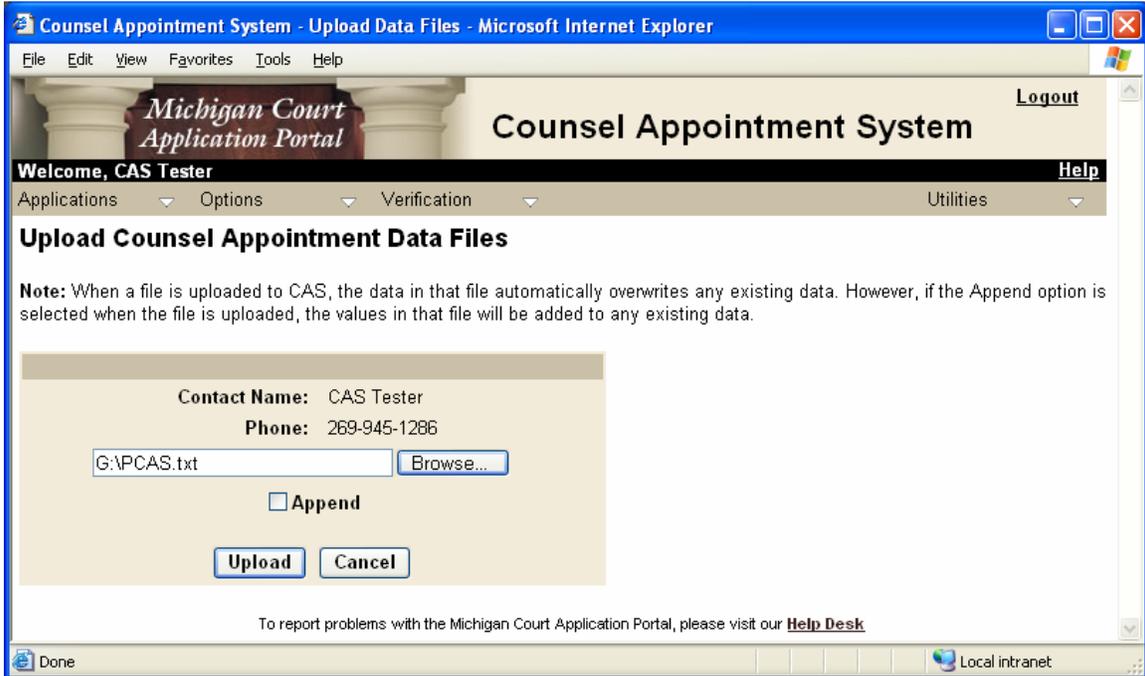


Figure 4: Browse for File to Upload

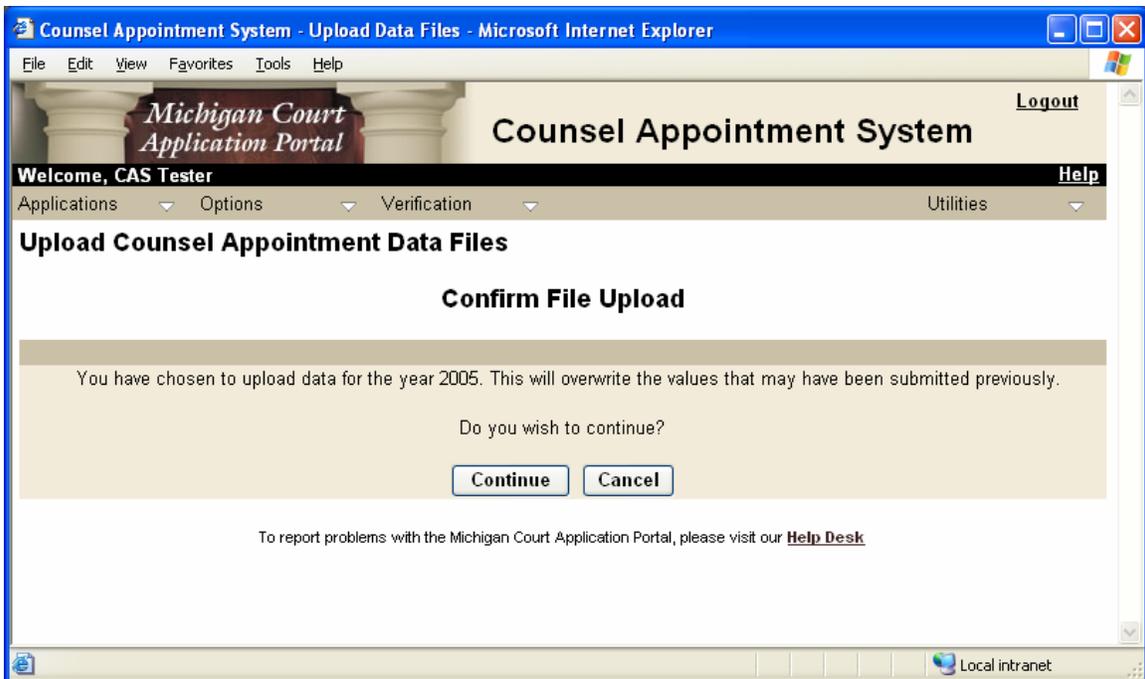


Figure 5: Confirm Overwrite or Append



Figure 6: Upload Results

2.4.1 Usage

Note: Uploading is available from January 1 through February 15 of each year. For instructions on how to properly format the text file, please see “File Format for the Submission of Electronic Counsel Appointment Data”, available as a download on MCAP.

Click the Browse button, navigate to and select the properly formatted .txt file to upload. Check the Append box if data should be appended to any existing data, otherwise the data will be overwritten. Pressing the Enter key or clicking the Upload button will begin the upload process. When prompted, click Continue to proceed with the upload or Cancel to abort the upload. The results of the upload will be displayed when the upload process is complete. If errors are reported, the erroneous data may be fixed and the file uploaded again; however in cases where the Append box was checked, it is recommended that modifications be made through the Data Entry screen.

2.4.2 Screen Element Descriptions and Usage

Name	Description	Usage
Browse...	Allows the user to navigate to and select the file to upload, or type in the path to the file.	Clicking the button opens the Choose File dialog box. Selecting a file displays the path and file name in the text field.
Append	Allows the user to add the values in the uploaded file to existing values in the database.	If checked, values in the uploaded file are added to existing data in the database. Left unchecked, values in the uploaded file overwrite any existing data in the database.
Upload Button	Begins the upload process and proceeds to the upload confirmation page.	Reads the first line of the file in order to display the year for which the data is being uploaded.

Name	Description	Usage
Continue Button	Continues the upload process and saves each valid record to the database.	Displays a count of records processed.
Cancel Button	Cancels the upload process and does not save any data to the database.	Returns the user to the Upload Data Files screen.

2.5 Group Maintenance



Figure 7: Group Maintenance

2.5.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court. When a different court is selected, the attorney groups for that court will be displayed. To add a new attorney group, type in the group name and then click the Add button. To edit a group name, click the Edit button to the left of the attorney group, type in the new name, and then click Save to keep the changes or Cancel to discard the changes. To delete an attorney group, click the Delete button to the left of the attorney group. When prompted, click OK to confirm the delete or Cancel to keep the attorney group. Deleting an attorney group prevents it from being entered for future counsel appointment data; however it will be displayed for previously entered data.

2.5.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may enter data for.	As the user types, the selection will move to the court that matches the keys typed. Changing the court will display attorney groups for that court.

Name	Description	Usage
Group Name	Allows the user to enter a new attorney group name.	A maximum of 30 characters may be entered.
Add Button	Saves the attorney group to the database.	Displays the new attorney group in the table.
Edit Button	Allows the user to modify the group name.	Displays the Save and Cancel buttons, as well as the Group Name field.
Save Button	Saves the modifications to the database.	Hides the Save and Cancel buttons, and updates the group name in the table.
Cancel Button	Discards any modifications made to the attorney group.	Hides the Save and Cancel buttons, and returns group name to its previous state.
Delete Button	Deletes the attorney group from the database.	Prompts the user to confirm the deletion and then removes the attorney group from the table.

2.6 Exception Reports

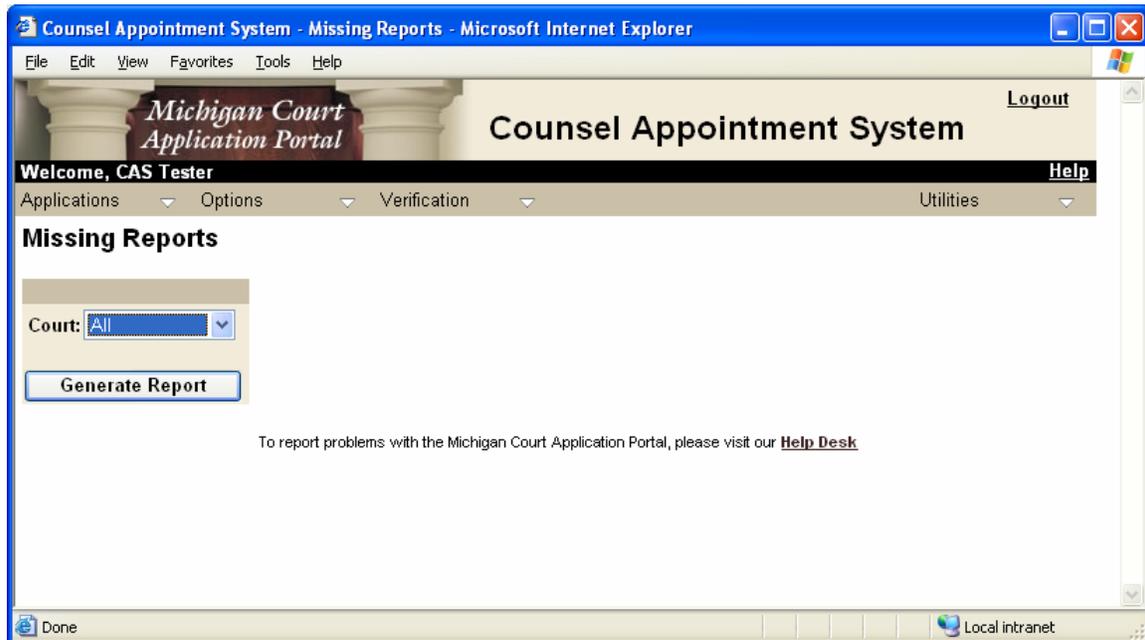


Figure 8: Exception Report Court Selection



Figure 9: Exception Report Output

2.6.1 Usage

The region and courts available to the user, along with a “None” option, will appear in the drop down list. Select the option desired by typing, using the up and down arrow keys, or clicking on the option. The “None” option will display missing data for all courts available to the user within a region. Pressing the Enter key or clicking the Generate Report button will proceed to the next screen.

2.6.2 Screen Element Descriptions and Usage

Name	Description	Usage
Region	Lists the regions the user may view exception reports for.	Click to choose a region from dropdown.
Court	Lists the courts the user may view exception reports for.	As the user types, the selection will move to the court that matches the keys typed.
Generate Report Button	Proceeds to the next screen using the court(s) entered.	Triggered by pressing the Enter key or clicking the button.

2.7 Verification Form



Figure 10: Verification Court Selection



Figure 11: Verification Form Submission

2.7.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court.

Pressing the Enter key or clicking the Continue button will proceed to the next screen. To cancel the verification process, click the Cancel button.

On the form submission screen, read the statement and check the box verifying that the statement is true. Clicking the Verify button will send an e-mail to the Chief Judge and Court Administrator or Probate Register informing them that the counsel appointment data has been verified for that court. Verification will not be successful if any records are blank for amount paid. To cancel the verification process, click the Cancel button.

2.7.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may verify counsel appointment data for.	As the user types, the selection will move to the court that matches the keys typed.
Continue Button	Proceeds to the next screen using the court entered.	Triggered by pressing the Enter key or clicking the button.
Cancel Button	Cancels the verification process.	Returns the user to the menu screen.
Verify Checkbox	Confirms that the user has reviewed and verified counsel appointment data for the court.	Checking the box will enable the Verify button.
Verify Button	Sends an e-mail to the Chief Judge and Court Administrator or Probate Register informing them that the counsel appointment data has been verified for that court.	Redirects the user to a screen that informs the user if the verification succeeded or failed.

2.8 Output Report Parameters

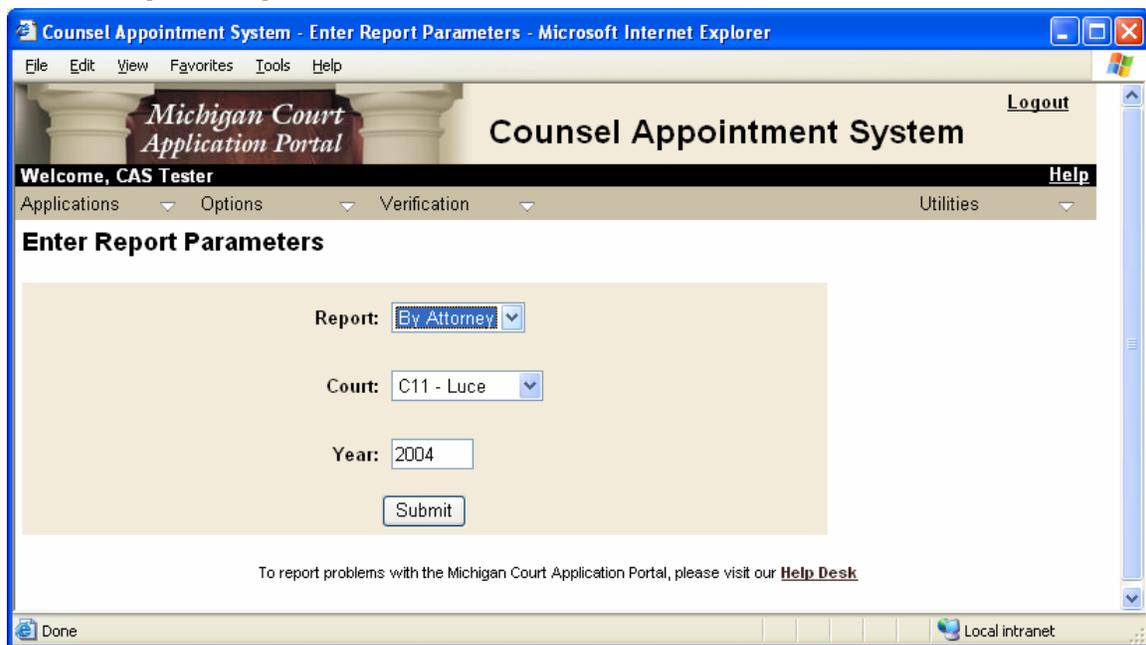


Figure 12: Output Report Parameters

2.8.1 Usage

The reports and courts available to the user will appear in the drop down list. Select the options for both Report and Court by typing, using the up and down arrow keys, or clicking on the option. Tab to or click on the Year field to change the year. Pressing the Enter key or clicking the Submit button will load the report on the following screen.

2.8.2 Screen Element Descriptions and Usage

Name	Description	Usage
Report	All Data: Displays data in column format; useful for exporting. By Attorney: Displays data grouped by attorney.	As the user types, the selection will move to the report that matches the keys typed.
Court	Lists the courts the user may view data for.	As the user types, the selection will move to the court that matches the keys typed.
Year	Accepts a 4-digit year.	Required. The previous year is displayed by default, however the user is able to enter any year between 2004 and the previous year (i.e. In 2007, the user may enter any year between 2004 and 2006).
Submit Button	Loads the report selected in the next screen using the court and year values entered.	Triggered by pressing the Enter key or clicking the button.

3 Output Reports

3.1 ActiveX Viewer

The Crystal Reports ActiveX Viewer must be installed in order to view the reports. When prompted to download and install the viewer, click OK. If there is no prompt and the report does not display, download and install the viewer from <http://courts.mi.gov/mcap/help/downloads>.

3.2 Usage

Group Tree: To expand or contract the group tree, click the group tree icon ()

Export: To export the report, click the export icon (). Select the file format (Crystal Reports (RPT), Acrobat Format (PDF), MS Word, MS Excel 97-2000, or Rich Text Format) and the page range, and then click OK.

Print: To print the report, click the printer icon () and then click OK.

Navigate: To navigate through the report, click the following icons:

 to move to the previous or next record
 to move to the first or last record



to go to a specific page number, enter a page number in the field to the left of the icon and then click the icon

Search: To search for text in the report, enter the text in the field to the left of the search icon () , and then click the icon.

Zoom: Select the percentage to zoom in or out from the drop down ().