

INPCMS Tasks Manual

This manual is documentation for using tasks in the INPCMS system.

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Tasks Overview

This manual will show you how to use tasks in INPCMS. The purpose of a task is to help keep track of various actions that need performed on a case or other item throughout its lifespan.

A task has the following attributes:

- **Assigned User**

This links to an active user in INPCMS. If you are unsure who it should be assigned to at the time of creation, “Unassigned” can be used instead of choosing a user.

- **Priority**

The default values are Low, Medium, or High. If your county would like a different set of priorities, this is a configurable field.

- **Due Date**

This is the date by which the task should be completed.

- Type

This is the object for which the task is associated, if any. For instance a task can be associated with a case, document, offender, etc.

- Message

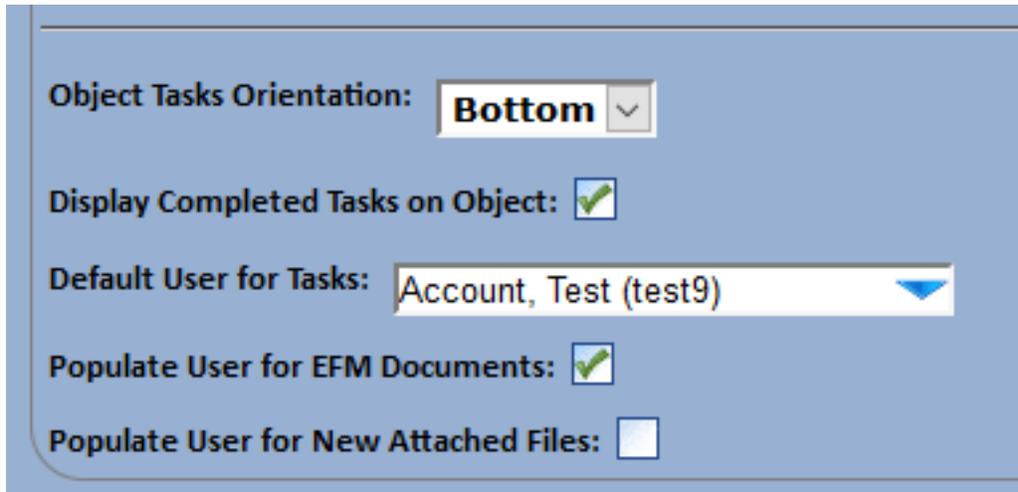
The message indicates the purpose of the task.

- Completion Request

This will cause a notification to be sent to the user that initially created the task, letting them know that it has been completed.

User Options

There are a few options that are configurable on a per user basis. These options can be found by clicking on your name in the upper left hand corner of the INPCMS.



Object Tasks Orientation: **Bottom** ▾

Display Completed Tasks on Object:

Default User for Tasks: **Account, Test (test9)** ▾

Populate User for EFM Documents:

Populate User for New Attached Files:

Object Tasks Orientation – This is where an object’s tasks will be displayed in the tab when viewing the object. (See Viewing an Object’s Tasks Section)

Display Completed Tasks on Object – Determines whether or not you want to see the completed tasks for an object. (See Viewing an Object’s Tasks Section)

Default User for Tasks – If this is defined, when you create a task, the default assigned user will be populated with this value.

Populate User for EFM documents – When uploading an EFM document to the case, automatically set the assigned user for creating a task. If this is not checked and a user is not selected when uploading a document, a task will not be created.

Populate User for New Attached Files – When attaching a file to the case, automatically set the assigned user for creating a task. If this is not checked and a user is not selected when attaching a file, a task will not be created.

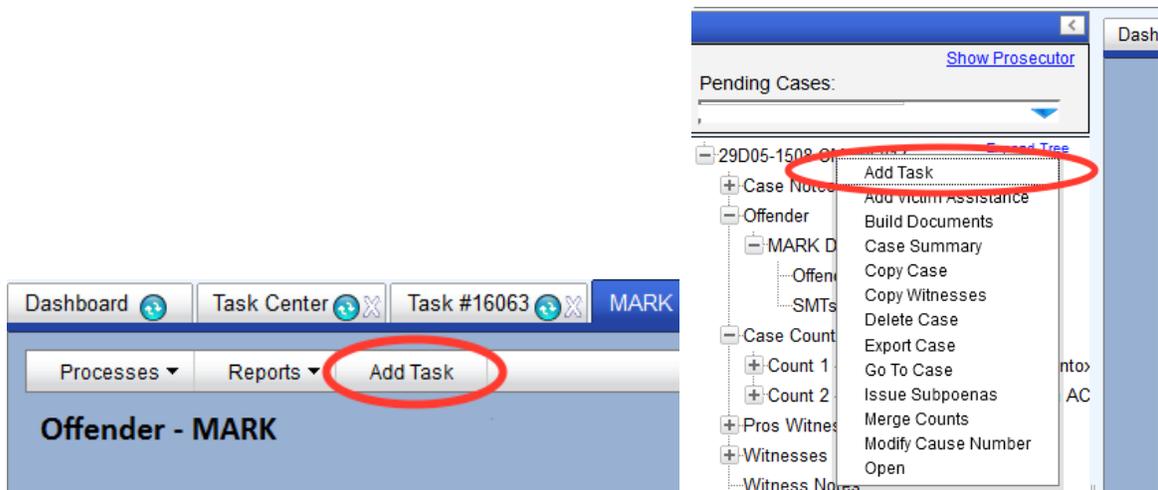
Creating a New Task

Tasks can be created a number of ways.

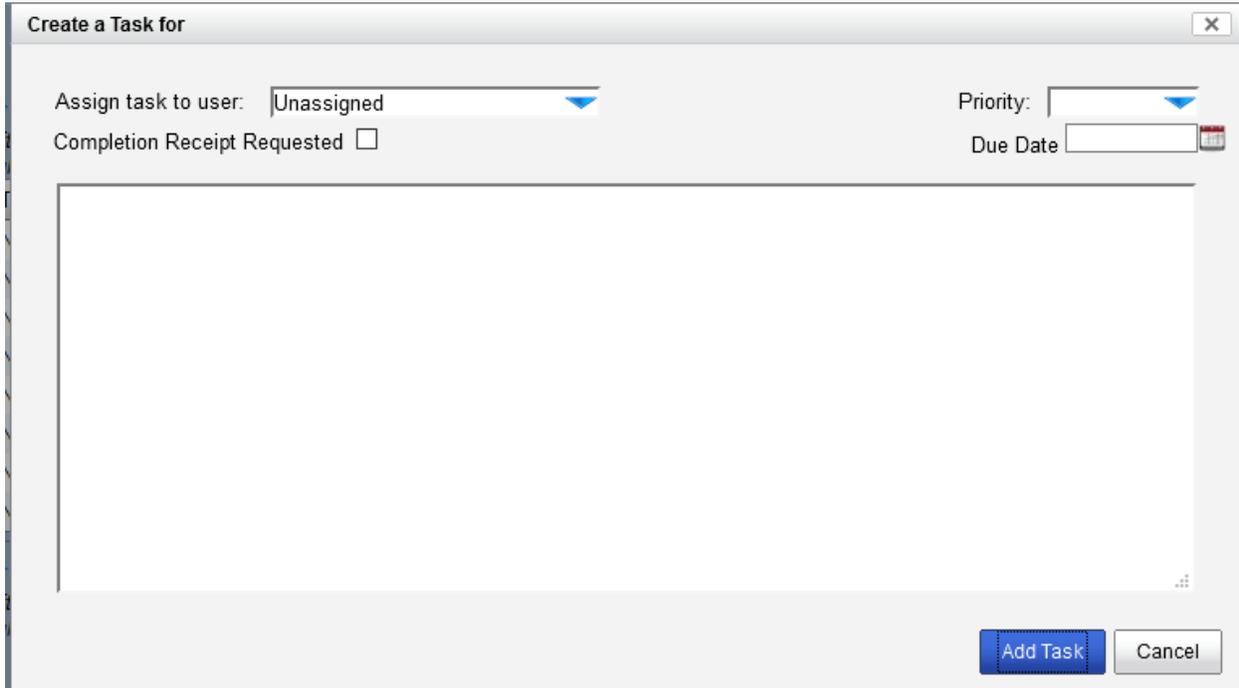
1. You can create a general task, not associated with any object. This can be found in the menu at the top of INPCMS.



2. If you would like to create a task associated with an object, you can find it in the objects menu or by right clicking on the object in the tree. Currently tasks can be associated with a case, offender, case notes, victim, witness, document, attached file, and file stamped document for criminal, juvenile, or forfeiture cases. They can also be associated with an issuer or check in the bad checks module.



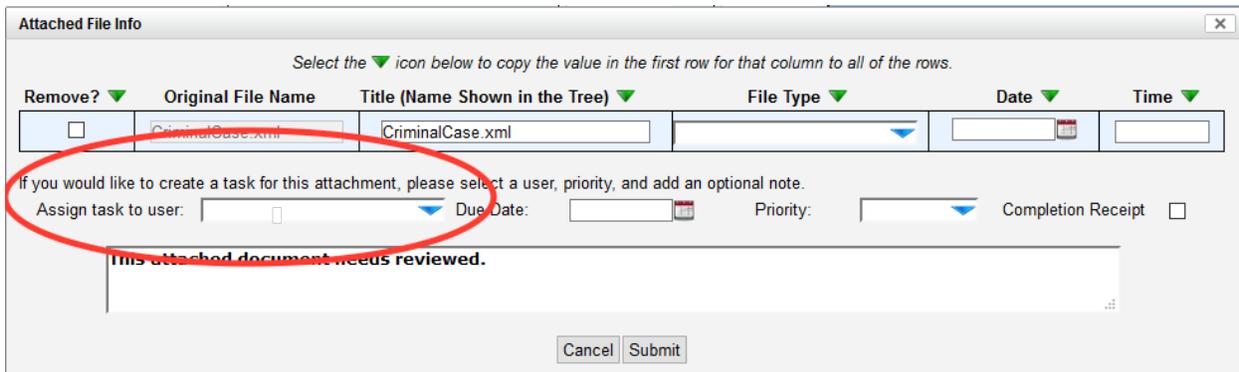
When you create a task, a panel will be displayed so you can fill in the necessary fields.



The screenshot shows a dialog box titled "Create a Task for". It contains the following fields and controls:

- "Assign task to user:" dropdown menu with "Unassigned" selected.
- "Priority:" dropdown menu.
- "Completion Receipt Requested" checkbox, which is unchecked.
- "Due Date" field with a calendar icon.
- A large empty text area for notes.
- "Add Task" button (highlighted in blue) and "Cancel" button.

3. You can create a task when attaching a file to the case. If the "Assign task to user" field is left blank, a task will not be created when uploading the file to the case.



The screenshot shows a dialog box titled "Attached File Info". It contains the following elements:

- Instruction: "Select the ▼ icon below to copy the value in the first row for that column to all of the rows."
- Table with columns: Remove?, Original File Name, Title (Name Shown in the Tree), File Type, Date, Time.
- Row 1: | CriminalCase.xml | CriminalCase.xml | [dropdown] | [calendar] | [calendar]
- Text: "If you would like to create a task for this attachment, please select a user, priority, and add an optional note."
- Form fields: "Assign task to user:" (with a dropdown menu), "Due Date:" (with a calendar icon), "Priority:" (with a dropdown menu), "Completion Receipt" checkbox.
- Text area containing: "This attached document needs reviewed."
- "Cancel" and "Submit" buttons.

A red circle highlights the "Assign task to user:" dropdown menu, which is currently blank.

- You can create a task when uploading a file stamped document from the EFM to the case. If the "Assign task to user" field is left blank, a task will not be created when uploading the file to the case.

Upload File Stamped Document

Document URL:

The document URL will be from the e-mail you received from the EFM.

If you would like to create a task for this document, please select a user, priority, and add an optional note.

Completion Receipt Requested Due Date

This court document for 29D05-1508-CM-006817 needs reviewed.

- When a case is created, there can be a number of actions that a Prosecutor or Paralegal might need to perform. There is built in functionality to define these initial case tasks for your county. When these are defined, you have the ability to assign all of these tasks to a user at once. From the case tab, select the appropriate menu option.

Dashboard

Processes Documents Reports Subsequent E-filing **Tasks**

Open Case 05/10/2016 By: tat

Case Status: * OPEN

Cause Number: * 29D05-1508-CM-006817 Warrant Requested:

Add Task
Assign Case Tasks
 View Case Related Tasks

From there you can select the tasks you would like created for this new case from the set of configured tasks, and assign them to a user or leave them as unassigned.

Assign Case Tasks

[Select all](#) / [Deselect all](#)

Assign task to user: 

Completion Receipt Requested

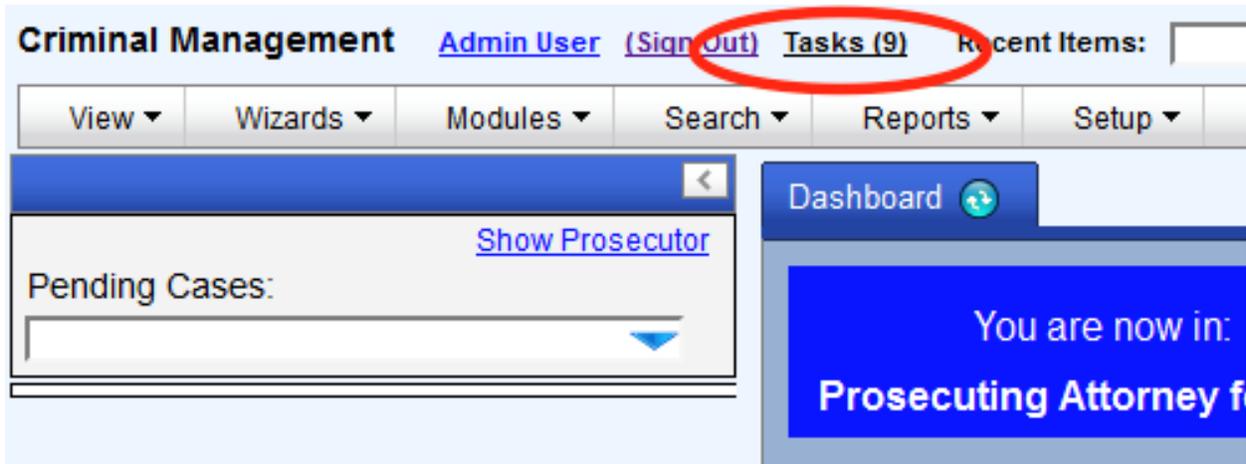
Priority: 

Due Date: 

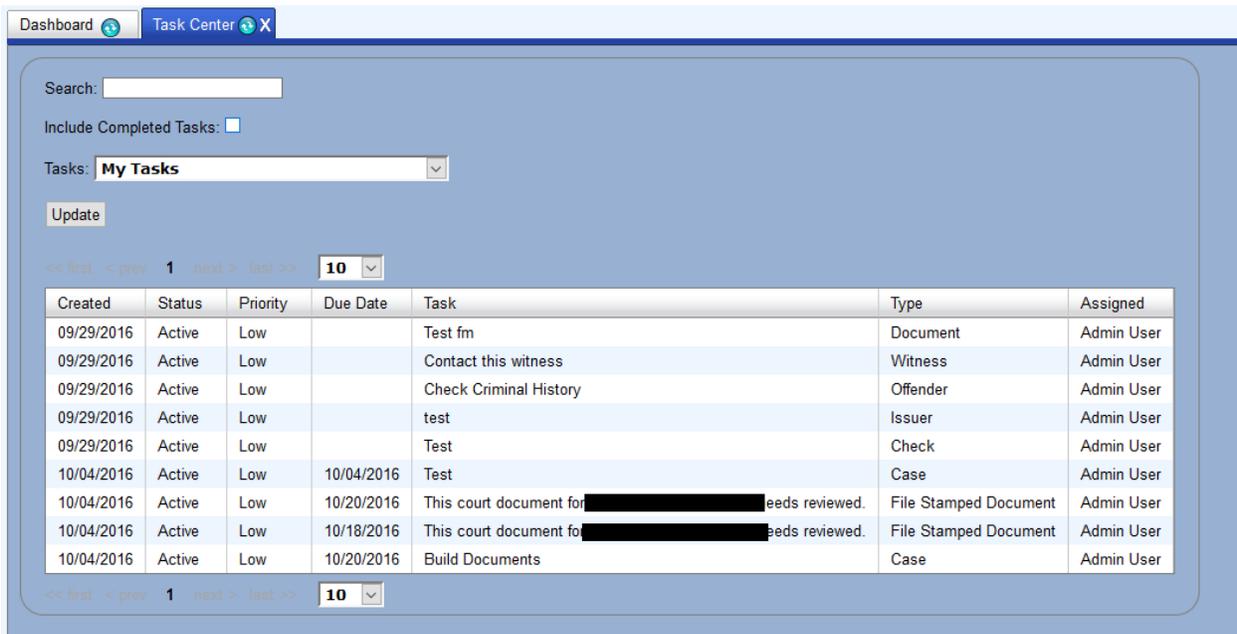
- Build Documents
- Send Notification for Victims
- Check for 911 Calls
- Speak to witnesses
- Gather discovery information

Task Center

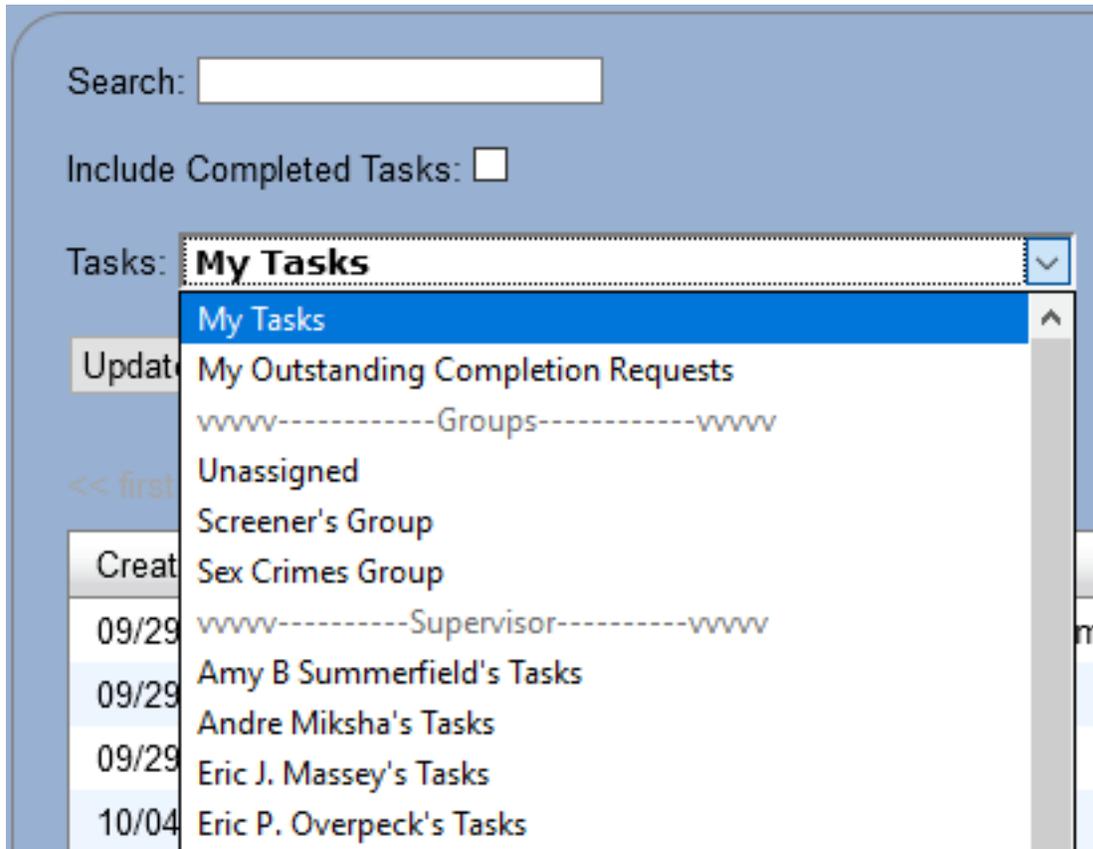
The task center can be accessed by clicking on the “Tasks” link at the top of the application. The number beside the link represents the number of active tasks currently assigned to the user.



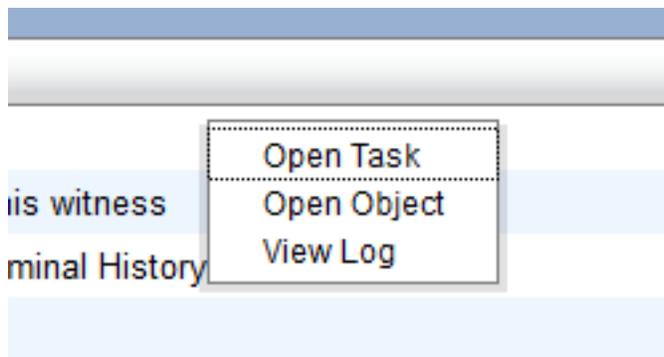
When the task center is open, you will see a table displaying your current active tasks. If you would like to show your completed tasks or search your tasks (you can search on the “Task” column information only), fill in the information and select the update button. Some of the various columns are sortable by clicking on their corresponding header.



While it defaults to your tasks, you have the ability to view the tasks for which you have asked for a receipt upon completion, as well as the ability to view Unassigned tasks and group tasks for which you have been granted access. If you have the appropriate permissions, you will also have access to view active tasks assigned to other users.



If you right click anywhere in the table, you will be prompted with a few options for the task.



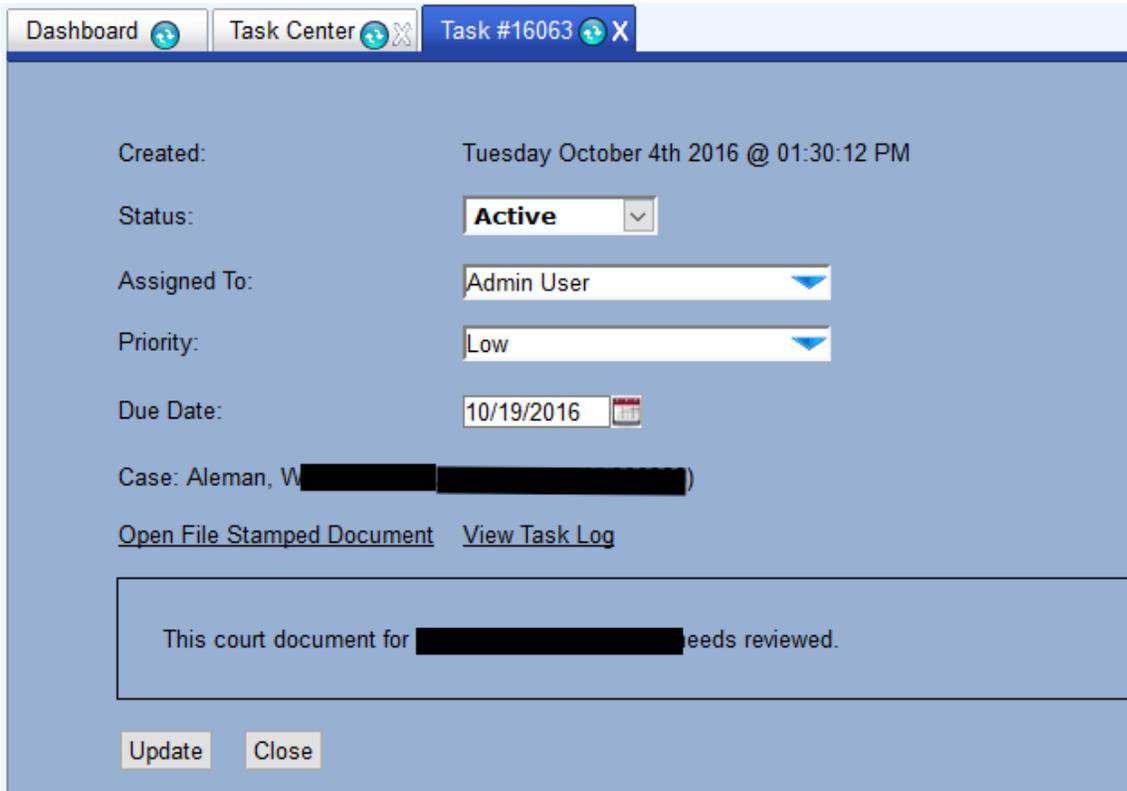
Open Task will open a new tab and allow you to edit the task.

Open Object will open the object for which the task is associated. So a case task will open the case, document task open the document, etc.

View Log will open a panel with a history of the task.

You are also able to double click on one of the tasks to open up the task in a new tab for editing.

If you have the appropriate permissions, you can edit the status, assigned user, priority, and due date of a task. If you do not have the appropriate permissions, you will not be given the option to update the task.



The screenshot shows a web application interface for task management. At the top, there are three tabs: "Dashboard", "Task Center", and "Task #16063". The "Task #16063" tab is active. Below the tabs, the task details are displayed:

- Created:** Tuesday October 4th 2016 @ 01:30:12 PM
- Status:** Active (dropdown menu)
- Assigned To:** Admin User (dropdown menu)
- Priority:** Low (dropdown menu)
- Due Date:** 10/19/2016 (calendar icon)
- Case:** Aleman, W (blacked out)

Below the task details, there are two links: [Open File Stamped Document](#) and [View Task Log](#). A message box contains the text: "This court document for (blacked out) needs reviewed." At the bottom of the form, there are two buttons: "Update" and "Close".

If you are assigning the task to a new user, you will be given the ability to add a note to the original task.

Dashboard Task Center Task #16063 X

Created: Tuesday October 4th 2016 @ 01:30:12 PM

Status: **Active**

Assigned To: 2, Sex Crimes EService (SexCrime)

Priority: Low

Due Date: 10/19/2016

Case: Aleman, W [REDACTED]

[Open File Stamped Document](#) [View Task Log](#)

Additional Information:

[REDACTED]

This court document for [REDACTED] needs reviewed.

Update Close

The task log will show any action that has been performed on the task, including viewing the task.

Date	Assigned User	Action	Action Performed By
2016-10-04 13:30:12	Admin User	Created	Admin User
2016-10-05 10:46:46	Admin User	Viewed Task	Admin User
2016-10-11 22:00:44	Admin User	Viewed Task	Admin User
2016-10-11 22:01:19	Admin User	Viewed Task	Admin User
2016-10-12 13:58:08	Admin User	Viewed Task	Admin User
2016-10-12 13:58:29	Admin User	Viewed Task	Admin User
2016-10-12 13:59:21	Admin User	Viewed Task	Admin User
2016-10-12 14:03:32	Admin User	Changed 10/20/2016 Due Date	Admin User
2016-10-12 14:03:36	Admin User	Viewed Task	Admin User
2016-10-12 14:04:54	Admin User	Viewed Task	Admin User
2016-10-12 14:08:09	Admin User	Viewed Task	Admin User
2016-10-12 14:08:16	Admin User	Viewed Task	Admin User

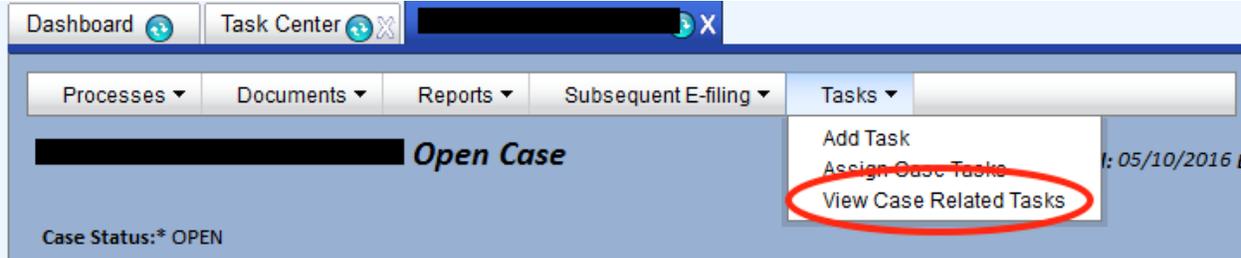
Viewing an Object's Tasks

When you are viewing one of the objects that can have a task associated with it, the tasks will appear in the area defined in your user preferences. The defaults for these are displaying at the bottom of the object, and showing all tasks both active and completed.

The screenshot shows the 'Criminal Management' application interface. On the left is a navigation tree with categories like 'Case Notes', 'Offender', 'Case Counts', 'Pros Witnesses', 'Witnesses', 'Dates', 'Built Documents', 'File Stamped Documents', 'Case Information', 'Related Co-defendant Cases', 'Related Sentencing', and 'Attached Documents and Files'. The main area contains several form sections for case details, including checkboxes for 'FTA', 'Firearm', 'Shoplift', 'Confidential', 'Search Warrant', 'Gang', 'Casino', 'State Police Lab', 'ACE', 'Blood Draw', 'Chemical Test Refusal', 'Domestic Violence', 'Costs Only', 'Costs Suspended', 'Suspended Fines', 'Sexually Violent Predator', 'GPB', and 'E-Service Assigned'. A 'Print' button is visible above a 'Tasks' table. The 'Tasks' table is circled in red and contains the following data:

Created	Status	Priority	Due Date	Assigned	Note
October 11th @ 09:19 PM	Open	Low		Unassigned	Build Documents
October 11th @ 09:19 PM	Open	Low		Unassigned	Send Notification for Victims
October 11th @ 09:19 PM	Open	Low		Unassigned	Check for 911 Calls
October 11th @ 09:19 PM	Open	Low		Unassigned	Speak to witnesses
October 11th @ 09:19 PM	Open	Low		Unassigned	Gather discovery information

If you are in a case tab, you are given the option to view all of the tasks that are associated for the case. So besides the tasks for the case itself, you will also see any tasks assigned to any victims, witnesses, or documents.



Dashboard Task Center [Redacted] X

Processes Documents Reports Subsequent E-filing **Tasks**

[Redacted] **Open Case** : 05/10/2016

Case Status:* OPEN

Add Task
Assign Case Tasks
View Case Related Tasks

Dashboard [Redacted] tasks X

Tasks Related to Case [Redacted]

Created	Status	Priority	Due Date	Task	Type	Assigned
09/29/2016	Active	Low		Contact this witness	Witness	Admin User
10/11/2016	Active			Test attachment	Attached File	Unassigned
10/11/2016	Active			Test victim person	Victim Person	Eric J. Massey
10/11/2016	Active			Test victim entity	Victim Entity	Eric J. Massey
10/11/2016	Active	Low		Build Documents	Case	Unassigned
10/11/2016	Active	Low		Send Notification for Victims	Case	Unassigned
10/11/2016	Active	Low		Check for 911 Calls	Case	Unassigned
10/11/2016	Active	Low		Speak to witnesses	Case	Unassigned
10/11/2016	Active	Low		Gather discovery information	Case	Unassigned
08/26/2016	Completed	Low		Test Task.	Case	Admin User
08/30/2016	Completed				File Stamped Document	Admin User
08/31/2016	Completed	Medium		This is a test task	Case	Admin User
09/02/2016	Completed	Low		Please look at this document.	File Stamped Document	Admin User
09/02/2016	Completed	Low		Test	File Stamped Document	Admin User
09/13/2016	Completed	High		This court document for 29D05-1508-CM-006817 needs reviewed. This has to do with blah.	File Stamped Document	Andre Miksha
09/28/2016	Completed	Low		This court document for 29D05-1508-CM-006817 needs reviewed.	File Stamped Document	Admin User
09/29/2016	Completed	Low		testing the document task	Document	Admin User
09/29/2016	Completed	Low		Tell me when this task is done.	Case	Test Account
10/11/2016	Completed	Low	10/21/2016	Need to send Discovery to Defendant's attorney	Case	testcs
10/11/2016	Completed	Scr - Night Court		Build Documents	Case	Unassigned
10/11/2016	Completed	Scr - Night Court		Send Notification for Victims	Case	Unassigned
10/11/2016	Completed	Scr - Night Court		Check for 911 Calls	Case	Unassigned
10/11/2016	Completed	Scr - Night Court		Speak to witnesses	Case	Unassigned
10/11/2016	Completed	Scr - Night Court		Gather discovery information	Case	Unassigned