

ADMINISTRATIVE OFFICE OF PENNSYLVANIA COURTS

INTRODUCTION TO THE CPCMS REFRESH



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Table of Contents

Project Overview	2
Approach to the CPCMS Refresh.....	2
The Reason for the CPCMS Refresh	2
User Impact.....	2
Functional Changes	3
General Interface.....	3
Navigational Changes.....	3
<i>Toolbar.....</i>	<i>3</i>
<i>Navigation Bar</i>	<i>4</i>
System-Wide Changes	4
<i>Screen layout</i>	<i>5</i>
<i>Application Control Changes.....</i>	<i>6</i>
<i>Grid Function Changes</i>	<i>8</i>
Limited Enhancements	10
Implementation	11
Training Approach and Go-Live	11
Training Opportunities.....	11
Impact of the Roll-out.....	12
Self-Led PowerPoint Presentation.....	12

Project Overview

Approach to the CPCMS Refresh

The CPCMS Refresh is a series of system-wide enhancements designed to modernize, not overhaul, application functionality. The Refresh, the first of a two-phase project for CPCMS, specifically focuses on updating the framework and technology of the application. While some limited enhancements are included in Phase I, most functional enhancements will be completed during the more extensive rewrite of CPCMS in Phase II.

The Reason for the CPCMS Refresh

The rollout of CPCMS began in 2003. Because technology is constantly changing and updating, the typical lifespan of a computer application, before becoming outdated, is ten years. At eight years, CPCMS is reaching its limit of functional ability.

Since the current framework of CPCMS is outdated, enhancements and new functionality cannot be implemented without major coding efforts. Seemingly simple changes require difficult programming which adds complexity to each request.

Furthermore, the lower court case management system (MDJS) and appellate court case management system (PACMS), comparatively, have been upgraded to a new framework that consumes less memory to operate and makes enhancements and new functionality easier to implement. CPCMS currently consumes more memory than the other two applications combined. When more memory is utilized, a slower-running application is the result. In its current state, since CPCMS is not in line with the MDJS or PACMS, communication amongst all three systems is also more difficult.

User Impact

The updated framework of the CPCMS Refresh opens up the possibility of many future enhancements during Phase II, including:

- ◆ A new module for delinquency cases.
- ◆ Addition of new county court divisions.

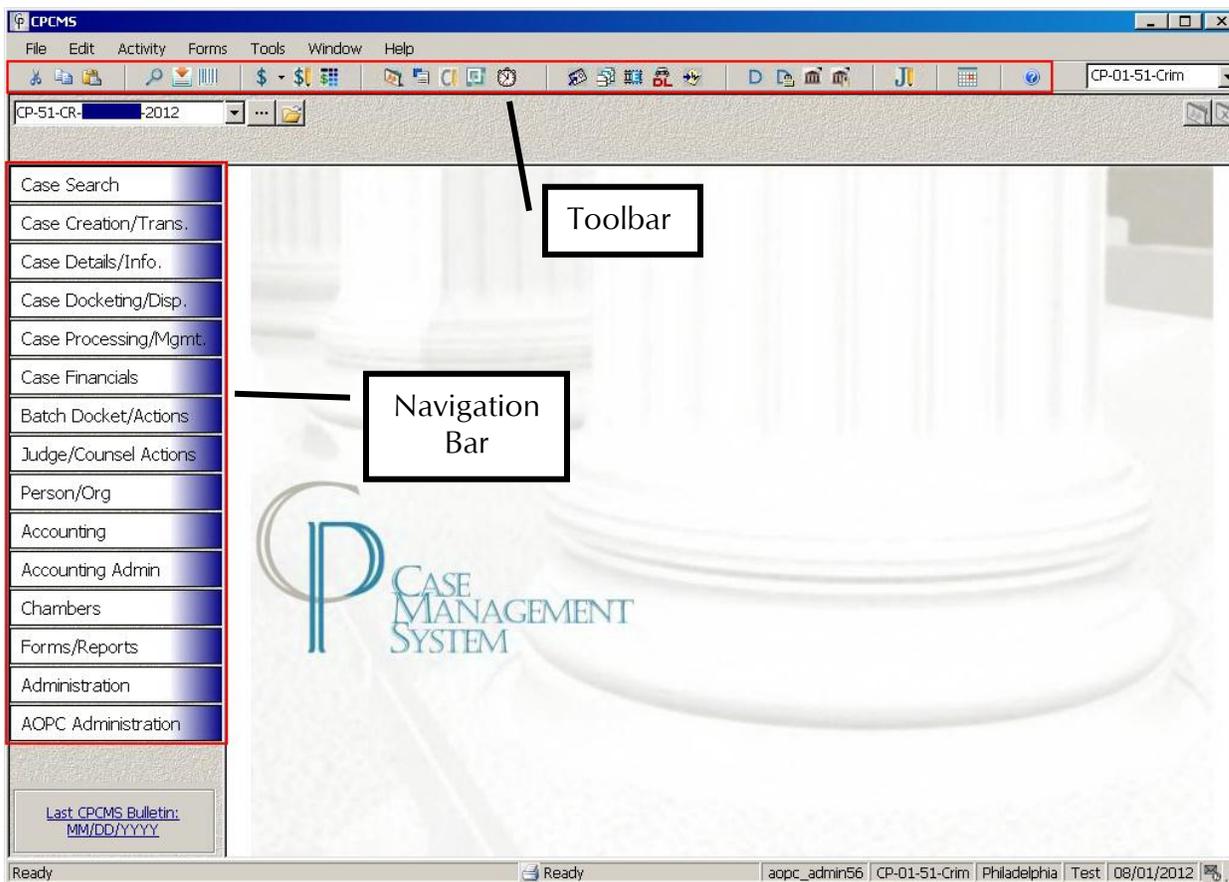
The CPCMS Refresh will also provide a better overall user experience which will be seen in the following:

- ◆ The speed of the application will be improved due to decreased memory consumption.
- ◆ The design of CPCMS will be streamlined to make it smoother and easier to navigate with fewer mouse clicks to complete work tasks.
- ◆ The connectivity between the other court case management systems will be enhanced.
- ◆ The integrated help file will provide more detailed information in a way that is easy to find and navigate.

Functional Changes

General Interface

While there are a number of changes that will be highlighted in this document and future training opportunities, you should have a general sense of familiarity when you open CPCMS to the General Interface screen.



Visually, CPCMS Refresh will use a higher screen resolution of 1024 x 768, as compared to the existing or "Legacy" version of CPCMS, which uses 800 x 600. At this increased resolution, some items, especially smaller elements such as icons, appear more clearly and screens will display more information or fields.

Navigational Changes

Changes made to the toolbar and Navigation Bar will impact movement through CPCMS.

Toolbar

While some of the icons will have an improved appearance, the toolbar remains largely unchanged.



The following summarizes the changes to the toolbar:

- ◆ Icons will be added for Secure and Public Court Summary Reports.
- ◆ The Case Details icon will open the Case Details screen for the open or selected case.
- ◆ A DL Processing icon will be added in order to quickly access DL processing.
- ◆ The new Payment Plan icon will open the Payment Plan – Summary screen for the active case. If a case is not open, the Payment Plan – Search screen will open instead.
- ◆ An icon will be added to access the help page for the currently open screen.

Navigation Bar

While there will be a number of changes to the Navigation Bar, the changes make CPCMS functions easier and quicker to access. For example, Case Search will be moved to the top of the Navigation Bar and includes Find a Case in the menu.

Case processing functions will be broken out into five primary menu items that have been renamed to be more descriptive of the functions accessible within. As a result, there are no longer three levels of cascading menus. Instead all functions can now be accessed with only two clicks.



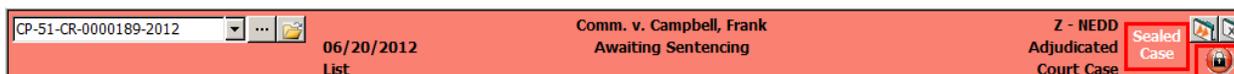
System-Wide Changes

Many of the more noticeable changes will be the differences in screen layout, which impacts the placement of fields and buttons and the overall look of screens. Other changes have been made to improve efficiency in the system. This section will summarize some of these changes in CPCMS Refresh.

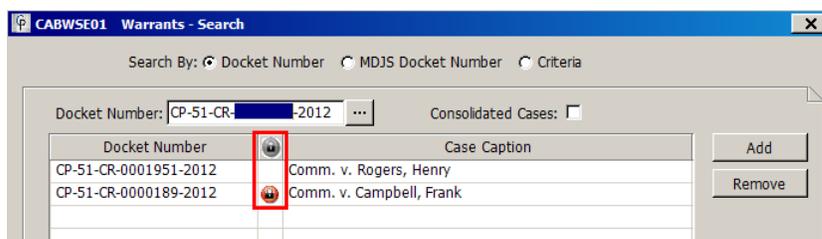
Screen layout

The following changes can be seen on screens throughout the application.

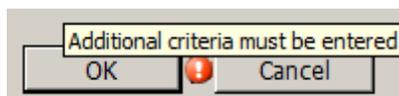
When a sealed case is open, the case bar will display a red background. Sealed case indicators also display in the case bar.



Additionally, all grids with docket number fields will display a sealed case column. These indicators will help to quickly identify sealed cases and act as a reminder that information on the case should be kept confidential.



Many errors that currently display in popup windows will instead display as “soft error messages” which appear as a red dot with an exclamation point symbol. Hovering over a soft error will display a message that describes the reason for the error.



The overall placement of some buttons and fields will change on many screens. These changes will be needed to accommodate additional fields or functions on the screen, upgraded screen design and the use of a higher default screen resolution by the application.

Four columns will be added to grids on additional screens to provide better historical case information: Create User, Create Date, Last Update User and Last Update Date. This information provides additional research tools for you, as well as the AOPC, when issues are reported.

Create User	Create Date	Last Update User	Last Update Date
erhine	03/02/2012	pdiffendall	03/02/2012
kcarey	03/02/2012	pdiffendall	03/02/2012
erhine	03/02/2012	pdiffendall	03/02/2012
meby	03/05/2012	dburkholder	03/05/2012
meby	03/05/2012	dburkholder	03/05/2012

More search screens will include sections of related criteria fields that will be offset on the screen by a light gray border and labeled appropriately.

Lastly, many screens that once displayed as popup screens, such as the Case Details screen, will now be imbedded into the application.

Application Control Changes

Some application controls have been updated to make their functions more apparent and streamline functions in the application.

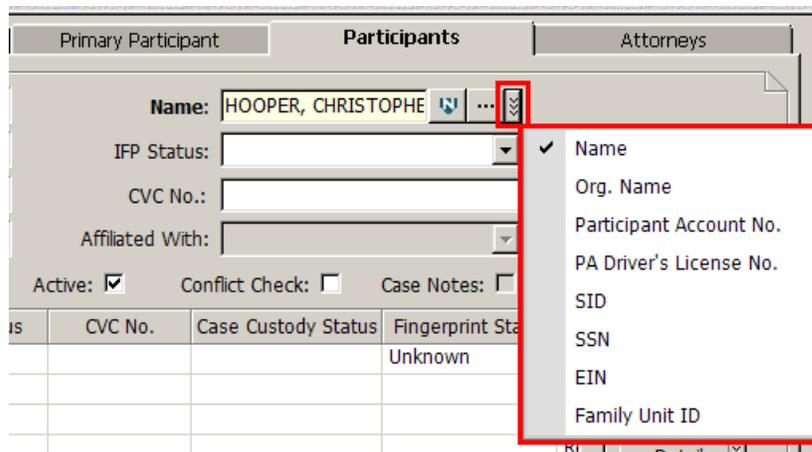
A few labels for fields and buttons will change. Notably, the Select Consolidated Case checkbox on search screens will be changed to Consolidated Cases. Also, CLEAR FIELDS will change to CLEAR.

The functions performed in Legacy CPCMS using the SAVE & CLEAR, SAVE and CLOSE buttons have been changed to APPLY, OK and CANCEL. APPLY will save any changes and leave the screen open. OK will save any changes and close the screen. CANCEL will close the screen without making any changes.

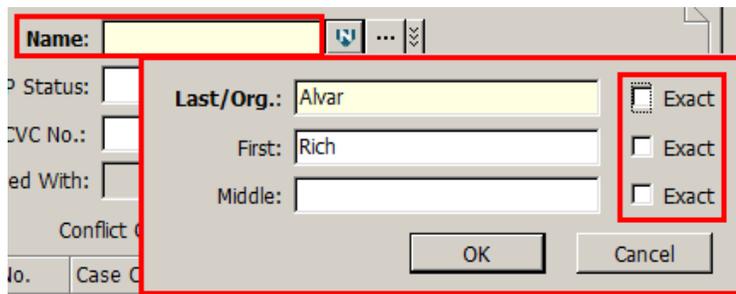
The new toolbar icons will take the place of some functions, and other functions will be consolidated into one button with the use of an expanding menu.



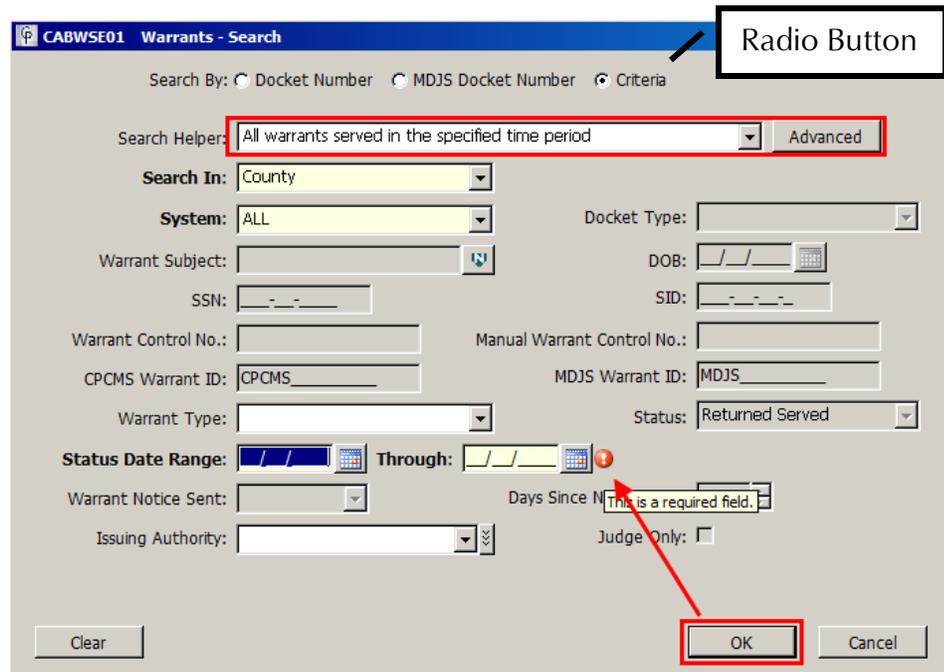
On many screens where a search is performed, multiple search options will be combined into a single field instead of having multiple fields that can be used to perform a search. The type of search can be changed by clicking the chevron next to the search field and selecting the search type from the options menu.



All fields in which a name is entered will automatically display the name helper that must be used to format the name properly. Only a last name or organization name is required. Searches by partial name can be performed by clearing the **Exact** checkbox for the appropriate field, as long as four characters are entered.



You will no longer need to click ADVANCED in order to enable fields on a screen. When a screen opens, all fields will be enabled. If the search screen contains a Search Helper, the ADVANCED button is used when you want to add additional search criteria to the fields used by the selected Search Helper. Also, the OK button will not appear disabled. If insufficient criteria are entered, or a required field is not completed, a soft error message will appear on the screen if you click OK.



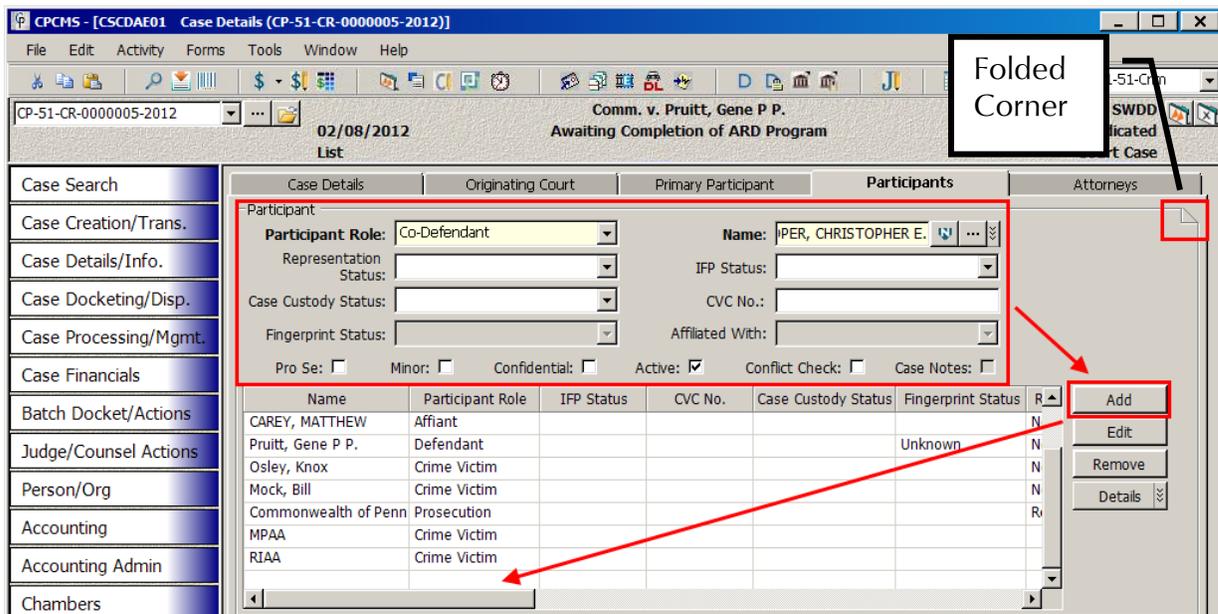
The way that cases can be multi-selected in a grid will be improved. While you will still be able to use the [SHIFT] key to select consecutive records, you will also be able to drag your mouse over all of the rows you want to select. Holding the [CTRL] key can also be used in combination with dragging the mouse to select consecutive sets of records, skipping over those that are not needed, or to add individual records to the selected set.

Screens that use radio buttons to select the type of criteria that will be used for a search will now be consistent and function like other screens that use radio buttons. Instead of having all of the fields and grids related to the different search types display together on a screen, which enable when a specific search type is selected, the fields that appear will change dynamically to match the search type selected.

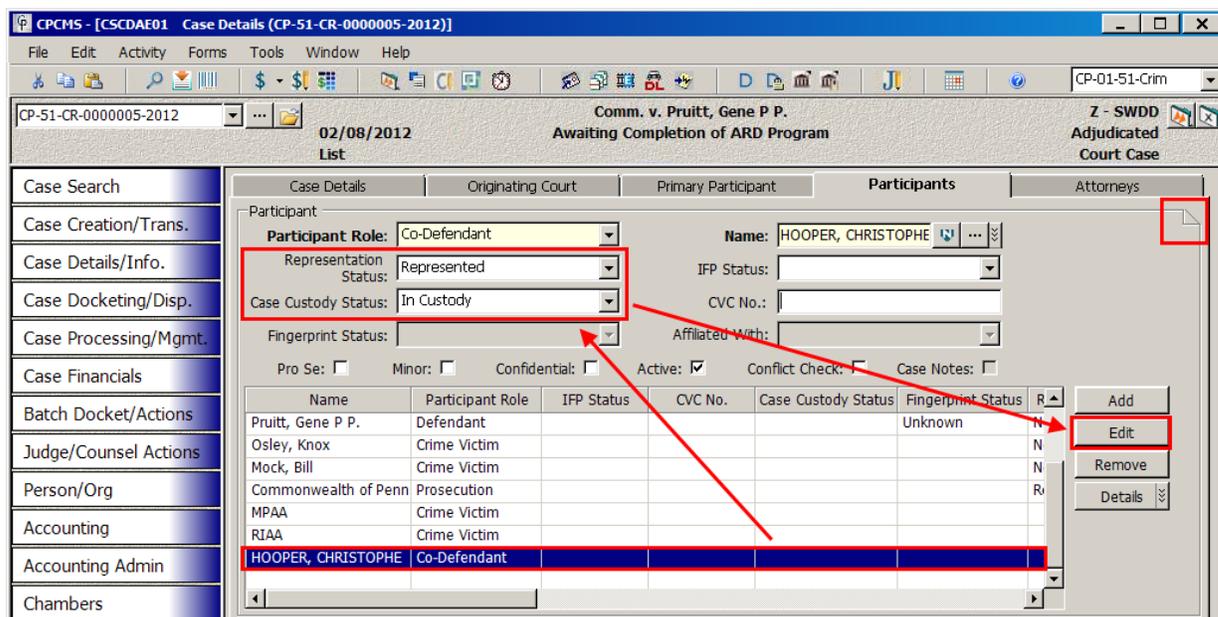
Grid Function Changes

Many functions that used to be performed on a separate screen, where the information was entered and then saved before being added to a grid, have been combined into a single screen. Since the information is added on the same screen as the grid, records can be added, edited and maintained quickly without waiting for screens to open and close. When a screen contains a grid that will functions in this manner, a folded corner will display on the upper right-hand side of the fields used to enter information.

To add information to a grid on a screen with a folded corner, complete the fields above the grid and click ADD. The new record is added to the grid.



To edit a record already displayed in the grid, select the record first. The information saved in the record will populate in the fields above the grid. Change any information needed and click EDIT. The selected record is updated in the grid.



Limited Enhancements

Calls to the Help Desk and recorded in Remedy have been reviewed to determine areas that would benefit from enhancement during Phase I versus Phase II. These enhancements include simplifying the use of some functions, better control over county data and improved case and resource management. The targeted enhancements are summarized as follows:

- ◆ When recording a disposition, you will be able to differentiate between the disposition and disposition filed date so that you will no longer need to open the Docket/Registry Summary screen to record the difference.
- ◆ The application will differentiate case and participant confinement so that county confinement information will no longer be overwritten. Both the case and participant confinement will be displayed on the Case Profile screen.
- ◆ The sentencing screen will provide greater flexibility in recording what the judge has ordered, sentencing conditions and linking.
- ◆ When a DL Form is generated, an official docket entry will automatically be added to the case to indicate the form was produced for mailing.
- ◆ Renaming of a participant on the Case Details screen will be available as a function for more than just the primary participant on the case.
- ◆ The Calendar screens will include improved rules and security in order to accommodate the business processes used by the counties. Added security roles will allow more flexibility in granting control over the calendar.
- ◆ Accounting screens will appear more like a ledger book with negative values displayed in red. Also, more information will display on summary screens and within the Payment Receipt screens.

Additional changes will be featured in future training opportunities.

Implementation

Training Approach and Go-Live

Training will be held regionally and at the AOPC rather than in each county as described below. Since each user will not be able to attend training, it is important to send county personnel that can share what they have learned with other users. It is important that each county be prepared for the transition to CPCMS Refresh by taking advantage of the available training opportunities. Since 65 counties will be going live on the same day, AOPC personnel will not be present in every county on the day of go-live. However, trainers will visit all counties in the weeks following the go-live.

Training Opportunities

The following list presents the training opportunities that will be available for the CPCMS Refresh.

User Reaction Sessions – October 2012

One and a half day sessions providing hands-on training that will be used to gather user insight into the difficulty/ease that can be expected during the Go Live period. Two or three sessions will be conducted, which will include users from counties of various sizes and from a variety of county offices. These sessions, which will be held at AOPC Mechanicsburg, will also be used to assess the effectiveness of new training materials.

Regional Workshops by Function – November and December 2012

Half day, hands-on sessions scheduled at various locations throughout the state (including AOPC Mechanicsburg) for users who are willing and able to share information with others in their region. Anticipated sessions are expected to review the following functional areas: Clerk functions, Sentencing, Fiscal, Calendaring, Dependency, and In-Courtroom processing.

Super User Training – December 2012 and January 2013

This session is tabbed for strong CPCMS users, identified by AOPC, with the intent of providing them with the tools needed to act as local support during the Go Live period. This training will be held at AOPC Mechanicsburg.

Pilot County Training and Go-Live – January and February 2013

Multiple training sessions will be held for all users in a, as yet, undetermined pilot county. Several weeks of training for all users will be followed by the go-live. Live on-site support will be provided by the AOPC for several weeks after the go-live.

Philadelphia Training and Go-Live – January to March 2013

Multiple training sessions will be held for all users in Philadelphia County. Several weeks of training for all users will be followed by the go-live. Live on-site support will be provided by the AOPC for several weeks after the go-live.

Statewide Training and Go-Live – March 2013

Training sessions will be provided for the remainder of all CPCMS users throughout the state and Allegheny County Minute Clerks. Training will be followed by the statewide go-live on April 1st.

Impact of the Rollout

Because the rollout will be partially staggered, with Philadelphia and the pilot county preceding the remainder of the state, there will be two different CPCMS systems running between February 1st and March 31, 2013. During this time, statewide searches will not be complete in either system.

Additionally, users will have two icons to connect to CPCMS in their browsers. Philadelphia and the pilot county will be able to access the legacy system as read-only during this time. All other counties will have a connection to access Philadelphia and the pilot county as read-only.

Down time should be expected prior to each go-live in order to transition all data to the new system.

Lastly, you should ensure that your screen resolution is set to at least 1024 x 768. Legacy CPCMS ran in 800 x 600. If the screen resolution is not increased, screens will not appear properly. If you are unsure of the screen resolution setting of your monitor, check with your IT department in order to have the correct resolution set by April 1, 2013.

Self-Led PowerPoint Presentation

The PowerPoint presentation that you viewed today is being reformatted into a self-led presentation that you can watch at any time. This presentation will be available on August 22nd on the CPCMS Online Learning Library website located at <http://cmstraining.pacourts.us/>.