PC JIMS Imaging

For Judges

This documentation is for PC JIMS version 1.42.35 and PCJ Imaging 2.02. 196.

Revised: 4/1/2018

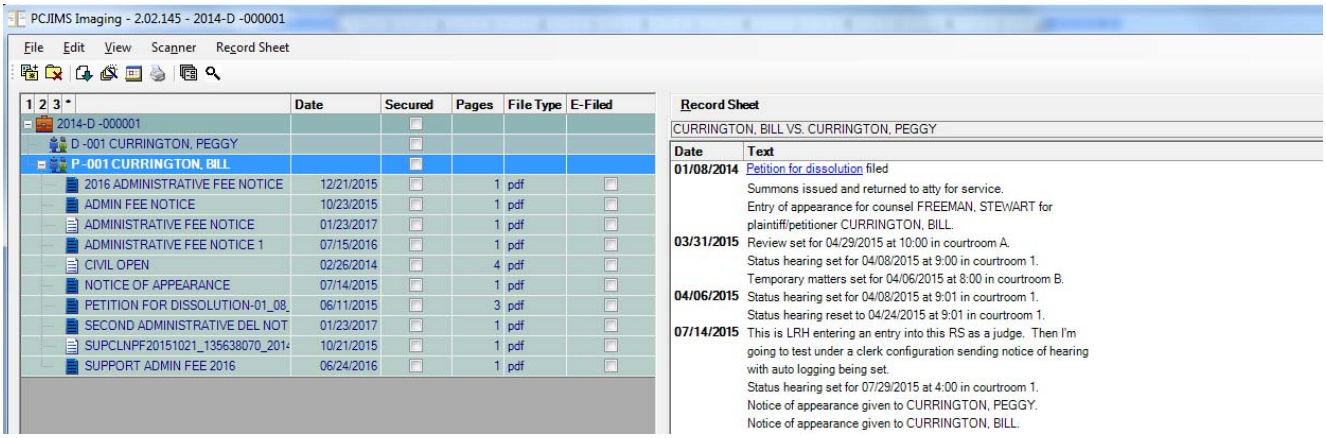
- Page 10 was modified to describe the procedure for a judge to make a ruling on a document that they themselves are efiling to the clerk.
- Page 11 was modified to update the list of annotations that are available to the judge when they are ruling on a proposed order.

OPENING IMAGING

There are a few ways that judges might choose to open Imaging.

- **Case Management Hub--**You will usually go into Imaging from PC JIMS. One way to do this is to simply right-click on a litigant and then left click on Imaging (second to the last option). You can also hit **F12** while on that litigant. You will be in and out of this program a lot so it is strongly recommended that you utilize the F12 option. For civil cases, you will want to be on the litigant that has the record sheet.
- **Record Sheet--**For judges that make their own docket entries, you might occasionally find that you are in the Record Sheet program, and you want to get into Imaging after you make your docket entry. The Record Sheet program therefore offers an Open Imaging on Save checkbox at the bottom of the screen. Checkmark that box if you want Imaging to open when you click Save.
- **Case Viewer**--The Case Viewer program provides access to viewing any of the documents on the Documents Tab. However, at the bottom of that tab, the **Work with Documents** hyperlink takes you into Imaging for full access to all of the Imaging options.

NAVIGATING THE IMAGING SCREEN



View--Folders/Files. At the top left of the screen there is an option titled "View". When you click on that option, two other options appear. If there isn't a checkmark next to "Folders/Files", click on it. For circuit clerk staff and some other users, this will be their preference, as it is the only way to really work with documents. There may be some users, however, that only view documents, and can do so using the hyperlinks from the Record Sheet. Those users might prefer to turn the Folders/Files option OFF.

Left Panel: The document list

When you are set up to view Files and Folders, the panel on the left side shows the document names for all of the scanned documents in this case. These documents can be sorted by name, the date they were scanned, or by the date on the record sheet. To change the how they are sorted, right-click on the litigant name in the left panel, go down to sort, and choose the sort option you want.

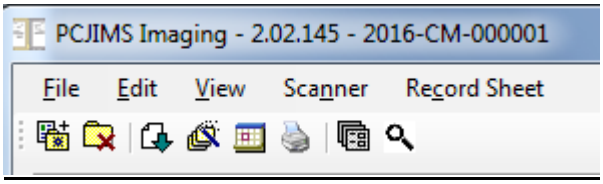
At the top of the panel there are several column headers (Date, Secured, Pages, File Type, and E-Filed).

- **Date** indicates the date the document was scanned.
- **Secured** shows if a document is available to the public.
- **Pages** is simply the number of pages in the document.
- **File Type** is always going to be pdf for scanned documents, but since any type of file can be imported into Imaging, it could be a Word document, a video file, spreadsheet or any number of other file types.
- **E-Filed** indicates if the document was electronically filed or not.

Right Panel--The Record Sheet/Review Documents area

The right panel opens to the record sheet. IF YOU AREN'T SEEING THE RECORD SHEET, you may have come into Imaging from the wrong litigant. Double-clicking the other litigant on the case will probably display it. (Record sheets are always stored on either P001 or D001 on most civil cases, but each county has its preference.) Any document that has been scanned and linked to the record sheet will appear as a hyperlink. If one of those documents is opened, the right panel will show that document instead of the record sheet. You can navigate through all your opened documents and the record sheet using the tabs at the top of the panel.

THE IMAGING TOOLBAR



Options on the Imaging Toolbar can help you navigate Imaging faster. Here's what's available:

View Folders/Files--This icon enables you to quickly turn the View Folders/Files option on and off.

Close all open tabs--As you are reviewing documents, you may end up with a lot of documents open at the same time. This can slow Imaging down and also be hard to know where everything is. Each open document has its own tab at the top of the right panel. To close a tab, click on the X below the tabs while viewing the document. But when you want to close all the tabs at once, click on the Close all open tabs icon. Alternately, you could navigate to the View menu and choose Close Tabs or just hit Ctrl+T.

Default to bottom of record sheet--This button controls the Scroll Record Sheet option under the Record Sheet menu. The Scroll Record Sheet option sets your default to always place you at the end of the record sheet when you come into Imaging. This is probably the preferred setting for users who are reviewing the most recent documents that were filed in a case.

Default to last hyperlink in record sheet-- This button controls the Scroll Last Hyperlink option under the Record Sheet menu. The Scroll Record Sheet option sets your default to always place you at the last hyperlink of the record sheet when you come into Imaging. This option is geared more toward circuit clerk staff who are scanning large quantities of old case files in their entirety.

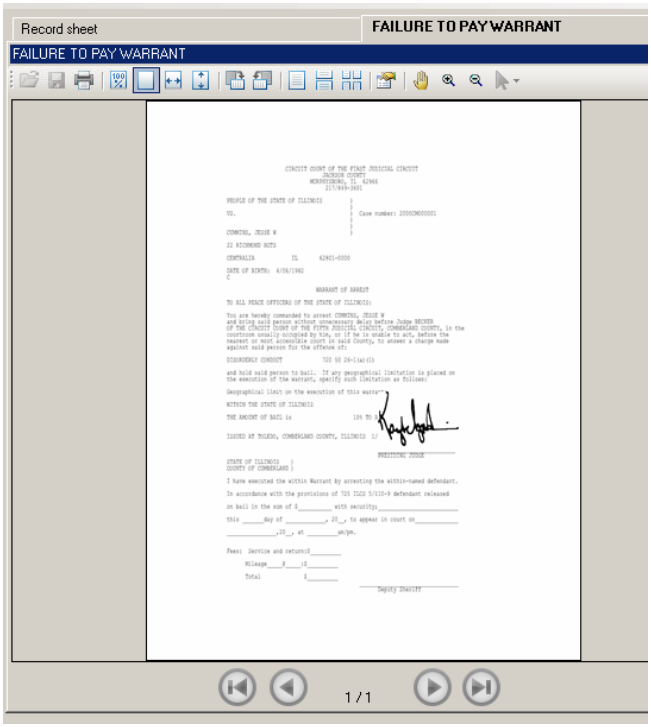
Go to date in record sheet--Select any date and you'll be moved to that specific entry in the record sheet.

Print record sheet--Can be used to print the record sheet, though the format is not the same as the format that PC JIMS prints.

Access the document queue-- This option won't be used by judges.

Search--To search for a specific word or phrase, use this option. You'll be given the option to search your documents list, or the record sheet or all of the documents that you have open.

THE DOCUMENT REVIEW SCREEN: OPTIONS WHILE VIEWING DOCUMENTS



The Document Review screen gives you access to many common functions:

At the bottom of the screen, these arrows will move through the pages to the left or right. Note that the will take you to the beginning of the document and the icon will take you to the end of it.

This toolbar across the top of the screen gives you many different options:

The printer icon is of course what you'll use when you want to print the document.

These icons change the view to show the document at its actual size, , or fit the document to the screen either in its entirety or in its full length or width . These are the fastest ways to enlarge a document.

Should you need to rotate a document, these icons will rotate 90° to the left or to the right.

Hover over these three icons and you'll see that the first one says "Single Page". The second one, "One Column" and the third one, "Two Columns. These are just different ways to view the document. Most recommended is the One Column format, which gives you a scroll-bar on the right for moving through a large document faster. If your view is on Single Page, navigation to the next page must be done using the arrows at the bottom of the screen. There you can also type a particular page number to move to that specific page.

The Properties icon will show you technical details about the size and location of the document.

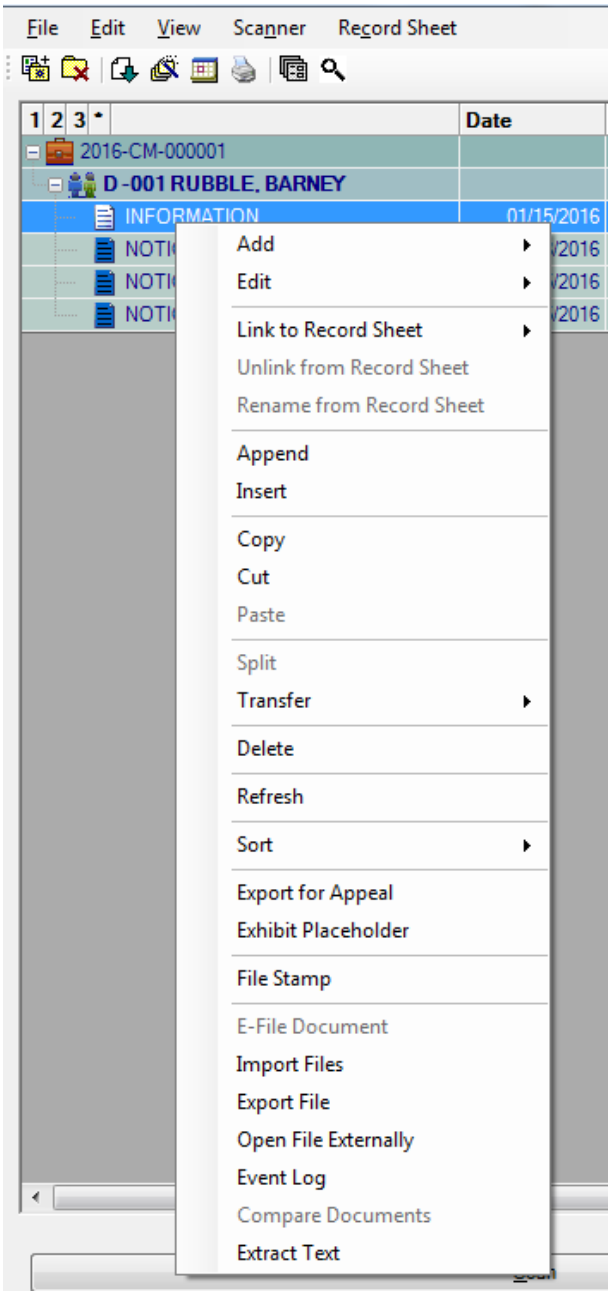
The Mouse Drag icon allows you to move a document up or down if you are zoomed in so much that a sidebar scroll appears.

The Magnifier icons are to zoom in and out of a document.

This icon provides the user access to our Annotations menu.

FILES/FOLDERS--OPTIONS

When you right-click in the Files/Folders area, you'll see a menu of options. What options are available to you depends upon the security options that have been granted to you, but here are some that you might find helpful...



Sort--Big cases end up with lots of scanned documents. This can make it a bit difficult to find a specific document. To make things easier, you can sort all the documents in the left panel. Right-click on the litigant's name in the left panel, hover over "Sort" and select how you want to sort the documents. Sorting by any of these options once will show the documents in ascending order while choosing the same option again will sort them in descending order.

> **Name--**Sorting by name simply sorts all the documents in alphabetical order by the name of the document.
> **Date--**This option will sort the documents in order of the date they were scanned. This is the same date that is displayed in the "Date" column in the left panel.
> **Entry Date--**Choosing to sort by entry date will sort all the documents in order of the date of the record sheet entry it is linked too.

Efile document--This option is for judges, who can upload their own documents and electronically send them to the circuit clerk to be filed. See **Efiling a Document to your Clerk** for more information on this process.

Exporting File--To export a file, right click on the document you want to send in the left panel and click "Export File". A new window pops up where you can choose to have the document stamped copy or confidential. Select a stamp or **None** and click "Ok". Another window pops up allowing you to tell Imaging where to save the document. Choose the file location you want and click "OK". You should then be able to locate the document in the file location you chose.

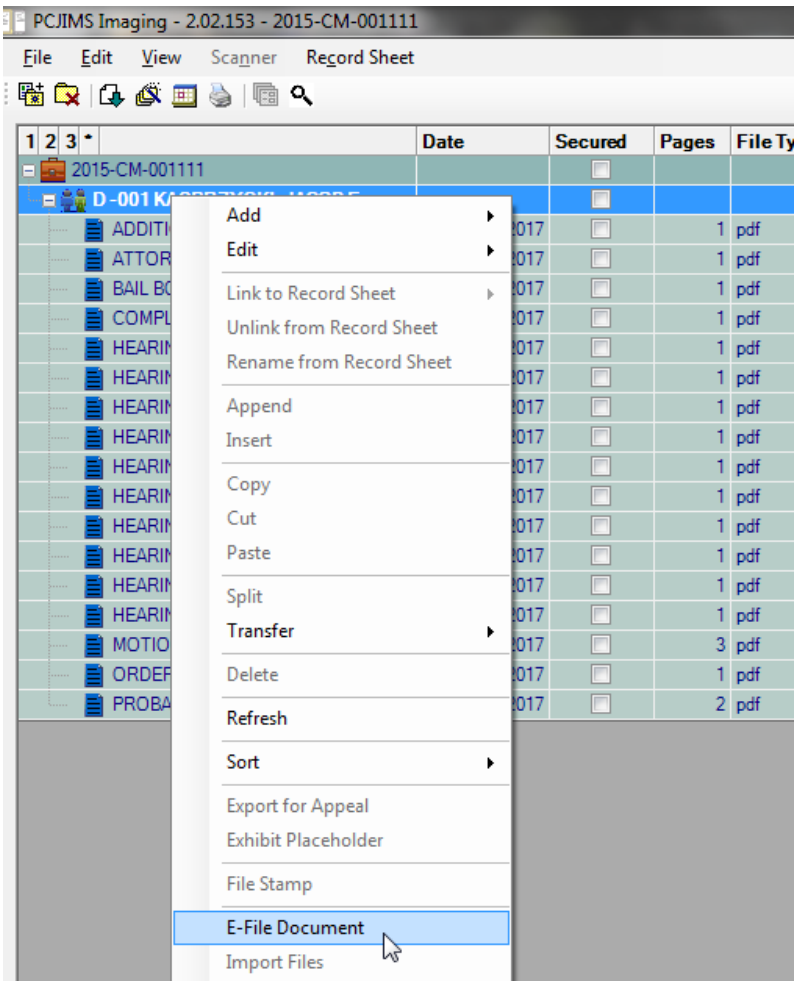
Open File Externally--Similar to exporting, opening the file externally will just open that document with a separate program. There you could save the document, or maybe attach it to an email.

Compare Documents--Sometimes you want to see two documents side by side. The easiest way to do so is by using the Compare Documents tool. Highlight two documents in the left panel. If the documents are right next to each other, click on one and drag to the other. If the documents are not adjacent, hold the Ctrl button and click on both documents. Now, right-click on one of the highlighted documents and select "Compare Documents". This will bring both the documents up, side by side in a new window. You have some viewing and printing options in this window, but you cannot save or edit the documents.

Finding the "Diff" between two documents*--If you have two documents that appear to be the same and you want to find a difference between them, from the Compare Documents screen, navigate to the File menu and choose Diff. This will perform a scan on the two documents and highlight the differences between them. This currently only works with notices and documents received electronically. To get back to Imaging, click on the X at the top right corner.*

Extract Text-- This tool allows you to open the text of a document in a way that can be copied and pasted. This will only work on documents that have been electronically generated and the text will not retain its original format or font. Right-click on the document you are working with and select "Extract Text". In the new window, you can highlight the text you want to copy and right-click or use Ctrl+C to copy the text. Use Ctrl+V or right-click to paste.

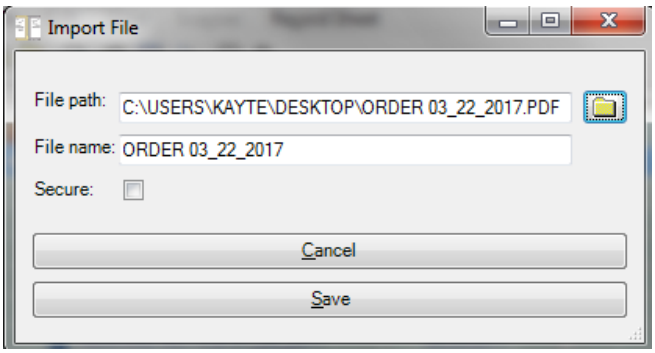
EFILING A DOCUMENT TO THE CIRCUIT CLERK



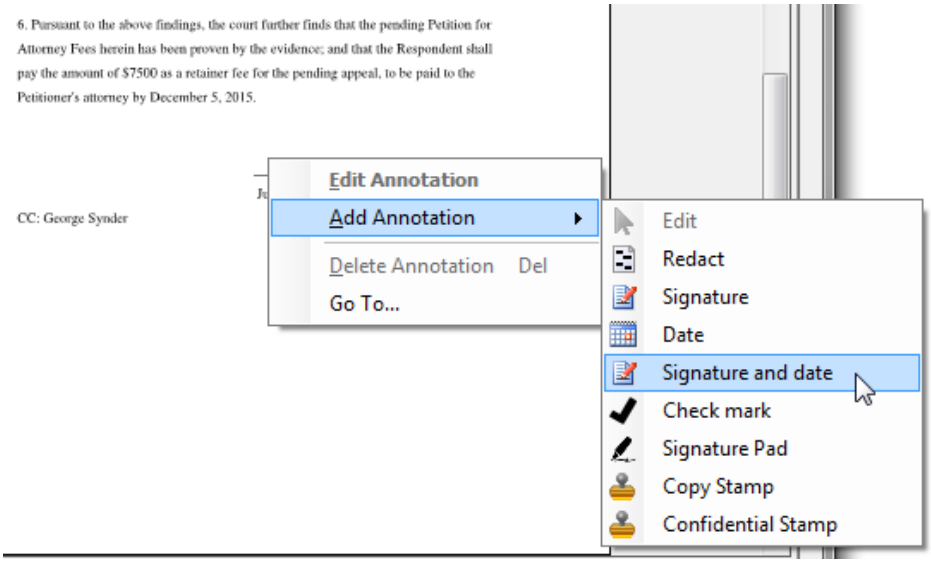
Should you need to file your own order with the circuit clerk, you can do so by using the E-File Document option. To do so, you'll need to pull up that case in th PC JIMS Hub and go into Imaging. Once you are in Imaging, right-click on the litigant's name and choose **E-File Document**.

Click the yellow Browse icon and navigate to the location of the pdf you want to e-file.

If the document should be secured, checkmark the Secure box. Then hit Save.



The next screen to display gives you an opportunity to review the document, and sign it. To apply your signature, right-click and choose either the Signature option, or the Signature and Date option. Then click the document where you would like your signature to appear. You'll be presented with a new sign-in screen. This is to ensure that the person applying your signature and filing this document is really you. Sign in using the same user ID and password that you use for PC JIMS.



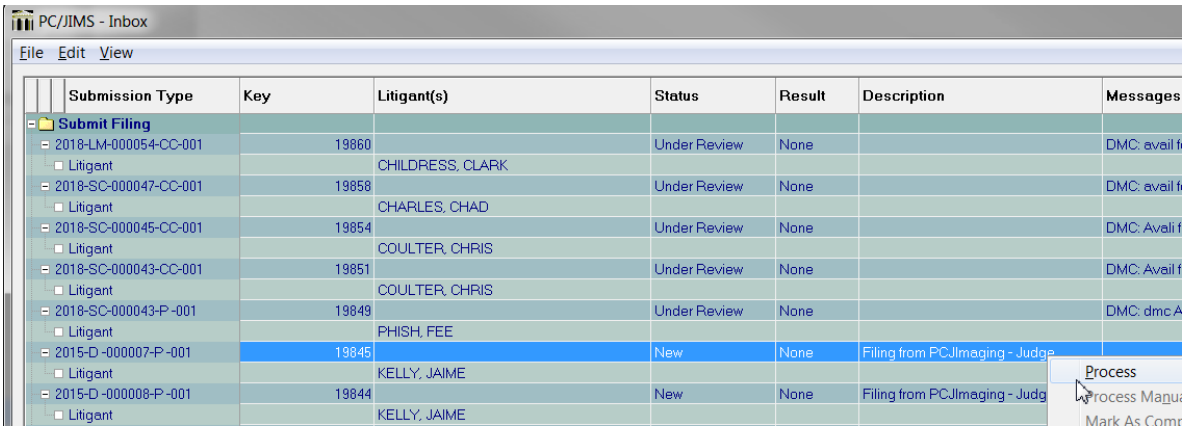
You'll see your signature appear on the document. If it doesn't appear exactly on the signature line, you can click the signature and a box will appear around it.

When you see the icon, you can click that icon and drag the signature box to the place where you want your signature to appear. The same is true for a date annotation or any other annotation you might apply.

Once you have your signature and date applied, click the **Send** button to send the filing to your circuit clerk.

Note: If you want to additionally send a ruling and accompanying docket entry with your document, you can go to your own Inbox and process this inbox submission. You'll be given the usual options to provide a ruling and docket entry and then the filing can be processed by the clerk. You'll want to do this immediately though, less the clerk processes your filing before you've done the ruling.

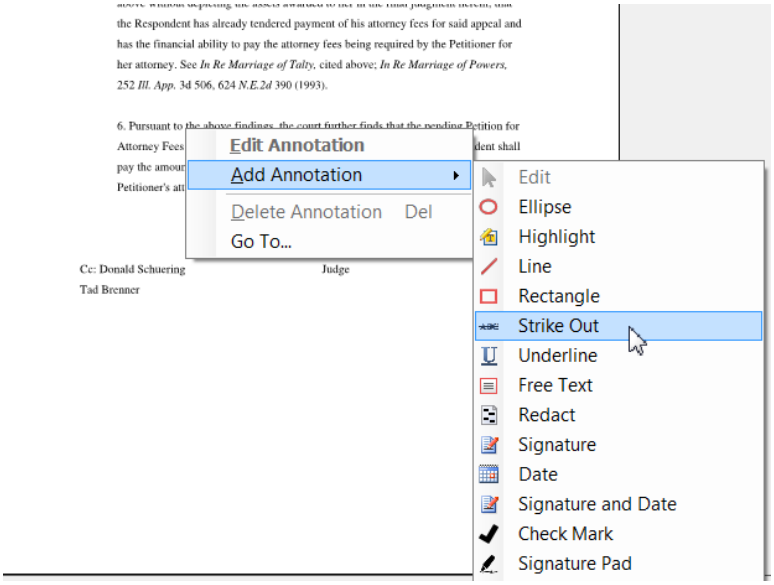
You'll see that the Description for these types of filings says "Filing from PCJ Imaging – Judge".



ANNOTATIONS

Annotations can only be added by judges to documents that have not yet been filed with the circuit clerk. So if, in the process of making a ruling on a proposed order, you need to apply any of these annotations, here are your options...

You can get to the annotations by clicking on the far-right icon or by right-clicking on the document and hovering over "add annotation".



These annotations are fairly straight-forward and simple to use. Choose the annotation you want to use and click on the document where you want to place it. Drag your mouse to accomplish tasks just as ellipses, highlighting, creating lines, rectangles or text boxes.

Ellipe/Highlight/Line/Rectangle/Underline--Use these options to draw attention to a particular section in a document.

Strike Out—To mark through a section of the order, choose this annotation and use your mouse to click and drag over the text that you want to strike through.

Free Text—This is your standard text box option. Use it to add your own language to an order before granting it.

Note that the Date annotation will always note the current date. Should you need to date a document with a different date, a text box can be used.

Redact--This annotation allows you to black out any part of a document. These can be moved and removed at a later date if you need to. To use this follow the same steps you as if you were highlighting the portion of the document.

Signature--The signature annotation is designed for judges to be able to electronically sign a document. Once this is set up (which is done by the circuit clerk), click on the signature icon and then click where you want the signature to go. A login screen will appear. Login and your signature will appear. You can resize and move it where ever you need.

Date--To add a date to a document, click on the date icon and then click where you want the date to appear. Like the signature, this annotation can be moved and resized if necessary. Note that this will only add the date that you are using it and cannot be backdated.

Signature and Date--This option adds your signature and a date at the same time.

Checkmark--To add a checkmark to a document, follow the same steps as you would to add a date. This annotation can be very difficult to move so make sure you are placing it where you want the first time.

Signature Pad--If you have a signature pad in the office, you can use it along with this annotation to electronically sign a document.

Copy and Confidential Stamp--These two annotations are probably used more by circuit clerk staff than judges. They apply a stamp to the document which marks it as a copy of the original, or a confidential document. Note that the Confidential stamp does not set the Secure flag on a document--that has to be done additionally. Place either of these annotations just like you would the date or checkmark annotations.

The Supreme Court's Electronic Filing Statndards and Principles, says on page 7, "Any electronic document submitted for e-filing must be secure from alteration, destruction or corruption." This rule, taken word for word would mean that proposed orders which are submitted for e-filing could not be modified by a judge prior to signing and making a ruling. We held to that rule for quite a while, and judges were informed that the only way to modify a proposed order would be to export the document, modify it outside of the program, and efile the edited version to the clerk. This wasn't easy or practical, but it was in keeping with the rule, which seemed clearly stated. We later learned that the EFM procured by the Supreme Court allows judges to modify proposed orders using annotations that can strike-out language and text boxes that can be used to add language. These capabilities HAD been in PC JIMS Imaging before, but had been disabled based on our understanding of the rule. However, seeing that judges are allowed to use such annotations elsewhere, we restored our complete list of annotations for judges to make such modifications from within PC JIMS.

Judge's annotations cannot be edited or removed after import into Imaging.

PRINTING FROM IMAGING

You can print documents and cases from Imaging. This can save you from making trips to the copy machine or from pulling files which saves time.

Printing a Document--To print a document, open the document in the left panel and click on the "Print" icon.
A new window appears where you can select to have your document printed with a stamp. The stamp will only be on this printed copy and will not remain on the scanned document. Select what kind of stamp (if any) you want on the document and click "Ok". The print screen will come up; here you can select the printer, page range, and number of copies and then click "Print".

Printing a Case--To print an entire case, type Ctrl+P or click on "File" at the top left and select "Print Case". A new window appears where you can select to have your documents printed with a stamp. The stamp will only be on this printed copy and will not remain on the scanned documents. Select what kind of stamp (if any) you want on the document and click "Ok". The print screen will come up; here you can select the printer, page range, and number of copies and then click "Print". The documents will be printed in the order that they appear in the left panel so you may want to sort them in the order you want to have them printed.