

MiFILE Document Management System (DMS)

Feature and Functionality Overview



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Background

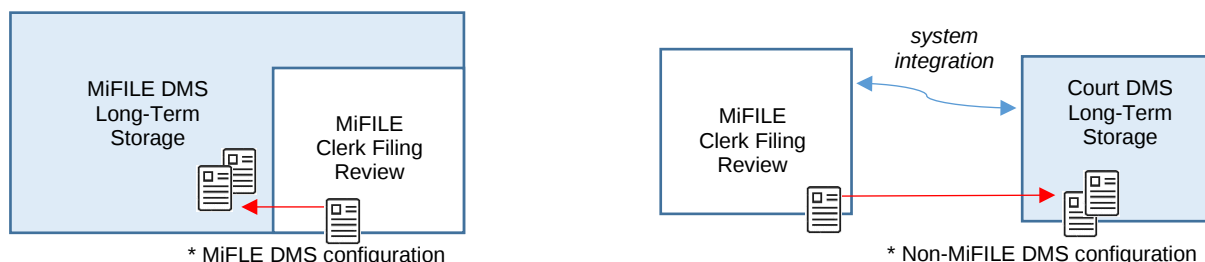
Implementation of the statewide e-Filing solution, MiFILE, will require both filers and courts to adopt new methods of operating for existing business processes. Most significantly for courts, that means using an electronic document management system (DMS) to store, organize, and process filed documents. At time of implementation, each court will be offered the option to use the SCAO-provided cloud-based *MiFILE DMS*, use the court's own existing DMS, or purchase a DMS.

The SCAO-provided *MiFILE DMS* is powered by OnBase®. This document provides an overview of the features and functionality of *MiFILE DMS*. We are very excited to provide this solution to the courts and look forward to working with you to move your court into the era of e-Filing.

If you are unfamiliar with the terminology commonly associated with a DMS or OnBase specifically, please review the terms listed in [Appendix A](#).

MiFILE DMS and MiFILE Filing Review

Regardless of the DMS configuration selected, each court will use the MiFILE Filing Review powered by OnBase to review electronic filings submitted by users. This filing review area is a short-term document storage area used to facilitate clerk review of documents to be accepted or rejected. Upon acceptance, documents are transmitted to the DMS for long-term storage. For courts using *MiFILE DMS*, the long-term storage area is included within MiFILE's OnBase application. However, for courts using a different DMS, the documents will be transmitted to the separate DMS application configured by the court, which will require integration with MiFILE.



Document Storage and Retrieval in a DMS

Moving from a paper-based file management system to a DMS requires a shift in thinking about how documents are stored and retrieved.

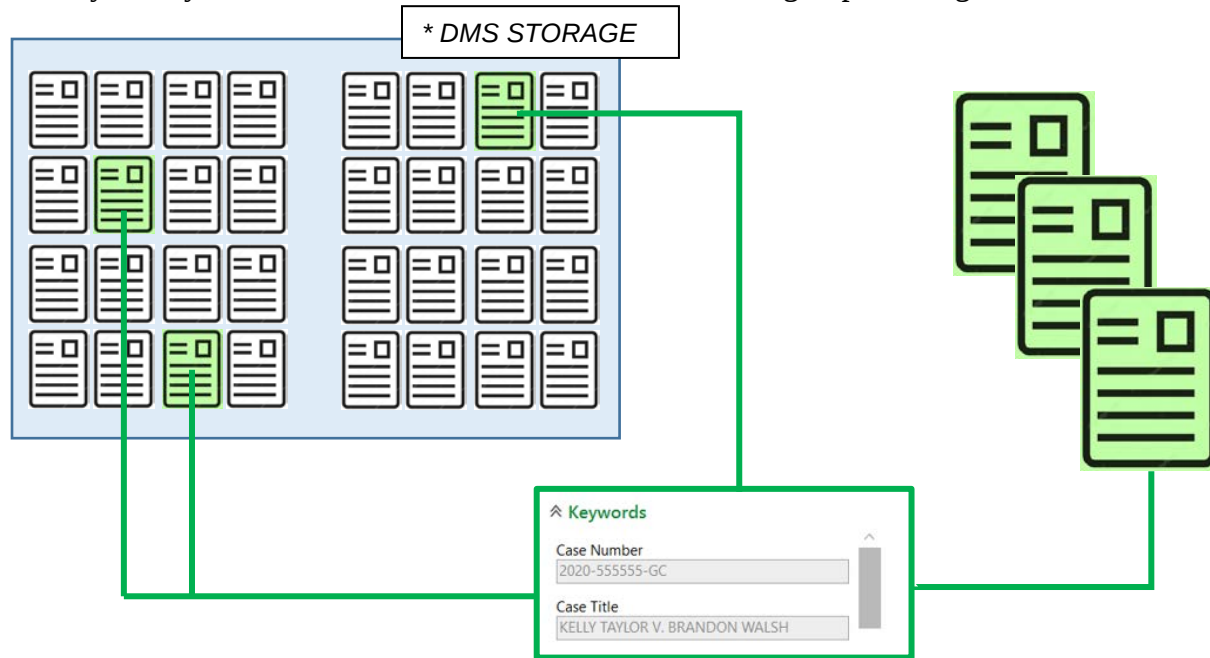
Traditional Paper-Based Documents

The traditional model of paper-based file storage and retrieval is a linear approach in which an individual accesses the one container and flips through the file to find the desired document. Finding documents in this manner can be slow and ineffective.



Documents Stored in the DMS

Although documents are stored in an electronic document system, a DMS does not rely on the typical electronic file folder structure you use on your personal computer. Instead, a DMS relies heavily on keywords—such as Case Number—to associate, group, and organize documents.



While a user will still be able to access files and documents in a traditional file cabinet approach, the use of keywords enables more dynamic file handling, as well as quick and easy access to desired information as discussed below.

MiFILE Document Management System Overview

The information outlined below provides an overview of the system configurations, features, and functionality of *MiFILE DMS*. Since *MiFILE DMS* is a cloud-based solution, except where local configuration is explicitly addressed, the configurations, features, and functionality will be the same for each implemented court. This also means that as *MiFILE DMS* is upgraded with new features and functionality, implemented courts will also receive those upgrades.

JusticeTech and System Administration

Within *MiFILE DMS*, designated local court system administrators will have access to the court configuration tool, JusticeTech. Within JusticeTech, the administrator can locally configure many of the settings and features that power *MiFILE DMS*, including:

- court user account management;
- lists of judicial officers (e.g. judges, magistrates, and referees);
- local court document catalog with document codes and CMS descriptions;
- hearing event codes and descriptions;
- courtroom locations;
- custom court dockets;
- court seal image configuration; and

- court holidays.

User Roles and Permissions in MiFILE DMS

Using the JusticeTech user account management tool, the local court system administrator can set the roles and permissions for each user to control the levels of access that the user has within *MiFILE DMS*. The administrator can control user access to:

- lifecycle queues;
- case types;
- confidential documents;
- sealed documents; and
- system tasks and tools by assigning role permissions.

MiFILE DMS System Integrations

MiFILE DMS will provide available integrations to all court CMS vendors. The following is a brief overview of the system integrations. Please see the [MiFILE Integration Guide](#)¹ for additional details.

- **CMS Case Data (Required Integration)**
This is a CMS to MiFILE integration that sends case level data from the court's CMS to MiFILE. Case data is sent for those cases in the CMS that are currently open or have been closed within the last 12 months. This is an asynchronous integration sent at designated intervals; it is not real-time. This integration allows MiFILE users to find and file into the case.
- **CMS Case Party Data (Optional Integration)**
This is a MiFILE to CMS integration that will allow courts to pass new party information from MiFILE to the court's CMS. This integration may be implemented at the court's discretion. Courts that want party data integration, but do not maintain multiple parties or attorneys, must enable one-way integration from MiFILE to the CMS. Courts that do maintain multiple party and attorney information in their CMS, can have two-way integration.
- **Record Filing Information (Optional Integration)**
This is a MiFILE to CMS integration that will allow courts to pass information regarding the filed documents received and coded to the court's CMS, such as register of actions information.
- **Court Docketing Information (Optional Integration)**
This is a CMS to MiFILE Integration that passes information from the court's CMS to MiFILE, letting MiFILE know when it has completed the requested write of record information to the court's CMS. If the court chooses to implement the record filing integration, the court docketing integration must also be implemented.

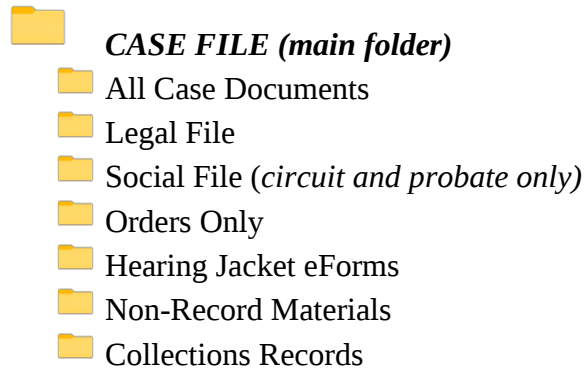
¹ As of 10/27/20, MiFILE Integration Guide version 3.3 is available.

Case File Organization and Status

As mentioned above, the DMS leverages keywords to group and organize documents. While this allows users to dynamically access individual documents when desired, *MiFILE DMS* also provides users with a traditional case “folder” experience.

Case File Folder Structure

The folder structures for each case file are fixed at a system level and cannot be locally configured. The following is the default file folder structure for each case file:



All Case Documents

This subfolder enables users to view all documents that are associated with the case number assigned to the case file. This folder is a compilation of the documents found in each of the subfolders.

Legal File

This subfolder contains all documents that have been designated for filing in the case’s legal file, such as pleadings, notices, and orders.

Social File (*circuit and probate only*)

This subfolder contains the confidential documents designated to be filed in the social file, such as MDHHS or other treatment provider reports. This subfolder will be available only to the probate and circuit courts.

Orders Only

This subfolder presents users with only case file documents that have been coded as orders. While the orders will also be available for viewing in the legal file folder, this subfolder exclusively returns order documents for the case.

Hearing Jacket eForms

This subfolder presents users only with [hearing jacket eForms](#) that have been created during the life of the case. This will enable users to easily view a hearing document history for the file.

Non-Record Materials

This subfolder presents users with those materials that are non-records. These are items such as those identified on the record retention schedules² as correspondence, information items, reference materials, etc.

Collections Records

This subfolder presents users with documents used for collections-related activities.

Filing Documents into a Sub-Folder

When a clerk user reviews and codes a document in MiFILE Filing Review, they will be able to select the appropriate sub-folder for filing the document. Documents will be assigned a default folder when setting up the court's document catalog. A selection by the clerk user will only be necessary when there is a need to override the default selection.

Case File Status

Each case file will have two status keywords, which can be set by the user: "case status" and "public status."

- **Case Status**

Each case file will have a case status keyword that can be set to a value of open (default), closed, or re-opened. This case status will be visible to users during a case search, or may be used for reporting purposes. The user will set this value by clicking the available task button.

- **Public Status**

Each case file will be set with a status indicating whether it is publicly accessible. Unless the case type is nonpublic, this nonpublic status is set by a user clicking on the available task button.³ The setting of the nonpublic status of a case is usually in response to some case activity, such as an order assigning to consent calendar, HYTA, or some other deferral option. When setting the nonpublic status of the case, the user will also select the reason the case is nonpublic from a dropdown list. This value will be available for case search and report generation.

Family Identification Number (FID) Tracking

In order to adhere to the "One Family, One Judge" principle, many circuit and probate courts assign cases a Family Identification Number (FID). *MiFILE DMS* will also allow for the assignment of a FID. In addition to simply associating the cases to individuals of the same family, as discussed below, the use of the FID will allow users to quickly and easily access the other case files and documents.

Case File Notes eForm

For each case file, users have the ability to store case level notes in a manner similar to what may have been written on the inside of a file jacket. These notes can be created and accessed by

² See record retention record series 15.400 ([Circuit](#)), 14.400 ([Probate](#)), and 13.400 ([District](#)).

³ Integration between the *MiFILE DMS* and court's CMS for the setting of the public status of the case is not currently available. When processing the case and setting the status in the CMS, the user will also perform this process in the DMS to ensure the statuses remain synced.

clicking a task button within the application. These case level notes will be accessible to those who can access the case file itself.

Judicial Case File Notes eForm

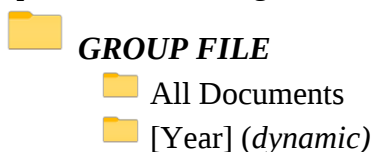
In addition to the case file notes, judges have the ability to create and view judicial case notes. These notes may be created and accessed by the judicial officer and designated users only. These notes will be created and accessed by clicking a task button within the application.

Group Files

Courts currently use group files to store documents that they are required to keep, but may not be part of a case file record series. *MiFILE DMS* will provide group file functionality. Courts will be able to create their own group files using JusticeTech; however, some group files will be created for the court by default.

Group File Folder Structure

The group file folder structure will be different from the default case file folder structure. Each group file will be configured with the following folder structure:



All Documents

This subfolder contains all of the documents that have been filed in the specified group file.

[Year]

A subfolder will be dynamically created for each calendar year during which a document was filed into the group file. A subfolder of 2019 would return those documents from the group file that were filed in 2019.

Accessing Files

MiFILE DMS users may access group and case file documents in three primary ways: search, direct access in the file cabinet, and within workflow.

Case Search Query

Users may use a case file search custom query to search for a desired case file based on specified criteria such as case number or title. Users may specify exact search criteria or use wildcard* searching.

File Cabinet

Like a traditional file room, users can directly access the file cabinet area of *MiFILE DMS* and access a file based on case number or case title. Users may specify exact search criteria or use wildcard* searching.

Workflow

When a user is processing a document within workflow, they will have quick and easy access to many other documents that are related to the document within workflow. As discussed below, there are several configured related-item portfolios, including a case file portfolio. Accessing the case file via the related-item portfolios will not require the user perform any search.

Accessing Related Documents

Use of keywords in *MiFILE DMS* enables users to quickly and easily find other documents related to the one the user is actively working with. There are two primary ways in which users can access related documents in *MiFILE DMS*: cross-referenced documents and related-item portfolios.

Cross-Referenced Documents

MiFILE DMS leverages document keywords to cross-reference related documents. Users can quickly and easily access these cross-referenced documents with the touch of a button. Examples of cross-referenced documents would be connected documents (i.e. attachments) and payment receipts for filed documents. Users may use the cross-reference feature both while working in workflow or in the file cabinet workspace.

Related Item Document Portfolios

MiFILE DMS leverages the use of keywords to enable users to find desired information quickly and easily while in workflow by providing related item portfolios. Within the workflow area of *MiFILE DMS* there is a “related items” [user pane](#). When selected, the user can access several portfolios of documents that are related to the item the user is working on within workflow. These portfolios are not configurable at the court level; however, the following portfolios are provided with *MiFILE DMS*:

-  Bundle Files
-  Connected Documents
-  Criminal Plea Packet (*district and circuit only*)
-  Filings by Case Number
-  Hearing Jackets for Case
-  Linked Documents
-  Orders by Case
-  Pending with Clerk by Case
-  Rejected Documents by Case in Last [XX] Days
-  Related Family Division Cases (*circuit only*)
-  Service History for Case
-  Social File (*circuit and probate only*)
-  Transcripts by Case

Bundle Files

This portfolio displays the case file documents that were filed at the same time, and therefore in the same bundle, as the selected document in workflow.

Connected Documents (i.e. Attachments)

This portfolio displays all documents that were filed as an attachment,⁴ along with the selected document in workflow. This allows users to quickly and easily view document attachments without endless scrolling through a document.

Criminal Plea Packet

This portfolio displays documents commonly used at time of criminal plea taking.

Filings by Case Number

This portfolio displays all of the documents in the legal file for the case number associated with the document selected in workflow. This will enable users to quickly and easily access the desired contents of the legal file.

- ***Delinquency and Child Protective Cases***

Although this portfolio returns all documents in the legal file for the associated case number, users may easily [group](#) those documents together based on the assigned petition number in juvenile cases.

Hearing Jackets for Case

This portfolio displays all [Hearing Jacket eForms](#) that have been created for the case number associated with the selected document in workflow. Users can use this portfolio to quickly access and view the hearing history for the case.

Linked Documents

This portfolio works specifically with Hearing Jacket eForms and [Routing Slips](#). When selected, this portfolio returns all documents linked to the hearing jacket or routing slip that was selected in workflow.

Orders by Case

This portfolio displays all documents that have been coded as an order and filed in the case number associated with the document selected in workflow.

Pending with Clerk by Case

This portfolio displays any documents that are currently pending with the clerk's office, awaiting acceptance or rejection, that are associated with the case number of the document selected in workflow.

Related Family Division Cases (Circuit Only)

This portfolio returns the circuit court's legal files for any and all cases with the FID associated with the document selected in workflow. The portfolio will automatically [group](#) and organize documents returned by case number. This will enable users to quickly and easily access and view information for related cases.

⁴ [Electronic Document Preparation Standards](#) have been issued that direct users to file attachments as a connected documents.

Service History for Case

This portfolio returns all filer-generated and filer-filed proof of service documents that have been filed for the case number associated with the document selected in workflow.

Social File (*Circuit and Probate Only*)

This portfolio returns all documents stored in the social file for the case number associated with the document selected in workflow. For circuit court juvenile cases, the documents will be grouped and organized by petition number.

Transcripts by Case

This portfolio returns any transcripts that have been filed for the case number associated with the document selected in workflow.

Working with Files and Documents

While users are working with documents in workflow, they have access to several tools to assist with document review and processing.

Document Annotations

In *MiFILE DMS*, several document annotations are available to the user. All annotations applied to the document are visible on the document, as well as the document information panel:

- **Sticky Notes**
MiFILE DMS provides users access to one of the most powerful communication tools in the courthouse, the sticky note! Users can apply notes to documents, hearing jackets, and routing slips. Access to the applied sticky notes is controlled through the roles and permissions assigned to the user. A judicial sticky note may be applied, which can only be accessed by the judge and other users with permission.
- **Redaction**
Users can apply either a black or white redaction to a document.
- **Highlights**
Users can apply highlighting to any portion of the document.
- **Stamps**
Several stamp annotations are available that enables a user to stamp preset information onto a document. The following stamps are available:
 - ***Custom Court Stamps***
Each court using *MiFILE DMS* will have the ability to configure up to five custom stamps that may be applied to any desired area of the document.

- o **Case Number**
This stamp will apply the case number associated with the document the user is working with to any desired area of the document.
- o **Date**
This stamp will apply the current date to the desired area of the document
- o **Dynamic**
This stamp will allow the user to type any desired text onto the desired area of the document.
- o **Judge**
This stamp will apply the name of the judge assigned to the case associated with the document the user is working with.
- o **Strike**
This stamp will apply a resizable slash mark “/” to the document in the desired area.
- o **X**
This stamp will apply an “x” to the document in the desired area.

Signing Documents within MiFILE DMS

Users have the ability to sign documents from anywhere within *MiFILE DMS* workflow. Each user will have access to a signature stamp, allowing them to apply their own signature only. The signature can be applied with the click of button. There are three different signatures options available to the user:

- **Signature with Seal**
This signature stamp will apply the user’s signature and the current date, with the court’s seal watermarked overtop of it.
- **Signature without Seal**
This signature stamp will apply the user’s signature and the current date only.
- **Signature On Behalf Of (O/B/O)**
This signature stamp is available only to judge users and will apply the judge’s signature and the current date, with the notation “OBO <<NAME OF ASSIGNED JUDGE HERE>>.” The name of the assigned judge will be affixed automatically, but can be edited by the signing judge.

Workflow within MiFILE DMS

Users actively work on documents in the workflow area of *MiFILE DMS*. This may include activities like reviewing recently accepted documents, preparing for upcoming hearings, or scheduling. There are two primary workflow areas (LifeCycles) in *MiFILE DMS*: Case Processing and Judicial Hearings. Both probation and friend of the court operations workflow areas will be added after the initial release of *MiFILE DMS*.

Getting Documents into Workflow

There are several ways in which users can pull documents into *MiFILE DMS* workflow so that users may actively work on them:

- **MiFILEd Documents**

Documents that have been electronically filed thru the MiFILE system will automatically appear in the MiFILE Filing Review for processing. Once the clerk accepts the documents for filing, the documents will flow to *MiFILE DMS* for further processing, if necessary.

- **Scanning Paper**

The court can configure a local scanner to scan paper documents into *MiFILE DMS* or MiFILE Filing Review for clerk processing.

- **File Browsing – Local or Network**

Users can import documents into *MiFILE DMS* or MiFILE Filing Review using a traditional browse and upload feature.

- **Virtual Print Drivers**

If installed, a user can leverage the OnBase virtual print driver to print a document directly to *MiFILE DMS* or Filing Review. This enables a user to easily print a document while in the courtroom and quickly import the document into *MiFILE DMS*.

- **Retrieval from MiFILE DMS File Cabinet**

After a document has already been processed and filed in the *MiFILE DMS* file cabinet, users can select a file to bring back into workflow for further processing with the click of a task button.

Case Processing

The Case Processing lifecycle is the default destination for documents that the clerk has accepted for filing, but require additional processing. Much like the courthouse inbox in which individuals or processing areas receive documents, the Case Processing workflow area has several designated workspaces called queues. *MiFILE DMS* will provide the following workspaces (queues) in the case processing workflow:

- **ADA Requests**

This queue workspace is used to receive and process requests for ADA accommodations. Access to this queue will be limited to the ADA coordinator and other users with specified permissions.

- **Language Access Requests**

This queue workspace is used to receive and process requests regarding foreign language interpreters. Access to this queue will be limited to the court's language access coordinator and other specified users.

- **Bench Warrant and LEIN Processing**

This queue workspace is used to facilitate the entry and removal of warrants. Documents will be placed in this queue for courts processing their own LEIN entry or when further communication with law enforcement is necessary, if the court does not do their own LEIN entry.

- **Clerk Workbox**

This queue workspace is a general workspace to accommodate a variety of document processing needs.

- **Custom Court Queues**

MiFILE DMS will provide courts with three additional queue workspaces that may be turned on when needed. These additional queues will provide courts with the flexibility to customize their case processing workflows.

- **Jurist Signing**

Although a jurist can sign documents in other areas of workflow, there are two queue workspaces to facilitate the jurist signing inbox that is commonly found at the courthouse. Both a Jurist Sign and a Return from Jurist Sign queue workspace are provided to easily set items aside that need a simple review and signature from the jurist.

- **Personal Workbox**

This queue workspace is used to review and process documents that have been specifically set aside for a specified user. This queue will be used in conjunction with the [Tag User](#) functionality discussed below.

- **Scheduling**

This queue workspace is used to accommodate any necessary case scheduling activities.

Hearing Process

The Hearing lifecycle in *MiFILE DMS* is the workspace used to accommodate the preparation and review of case files ahead of hearings, as well as the docket management on the day of the hearings. Each court will configure available hearing officers, event codes, and courtroom locations within JusticeTech. These configurations will provide the data necessary to leverage Hearing Jacket eForms throughout the Hearing lifecycle.

Hearing Jacket eForms

The Hearing lifecycle process utilizes Hearing Jacket eForms, which provide hearing details and allow for easy management of documents necessary for the hearing. A Hearing Jacket eForm is easily created with the click of a button, which would typically occur as part of the scheduling process.

- **Hearing Jacket Information**

There are three sections of information on the Hearing Jacket eForm:

- **Case Details**

The case details section includes information such as case number, case title, and the assigned judge, magistrate, or referee. The case detail information will be auto-populated when the hearing jacket is generated.

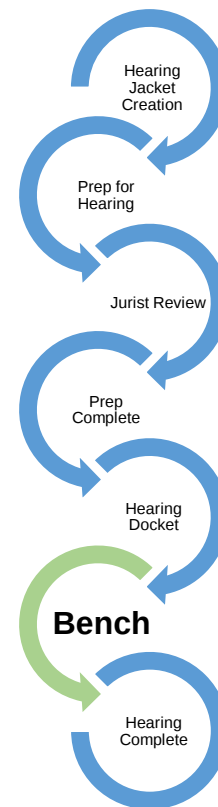
- **Hearing Details**

The hearing detail information will be filled-in by court staff and includes information such as the hearing type, date and time, location, the presiding hearing officer, and any identified interpreter needs. The information available for selection (e.g. hearing event codes) is configured in JusticeTech.

- **Party Information**

The party information section contains party type, names, and attorney information. Users can manage and track party and attorney check-in status using the hearing jacket, if desired.

* Hearing Workflow LifeCycle



- **Hearing Jackets and Document Management**

In addition to containing hearing details, the hearing jackets can be used to easily organize and manage documents necessary for the upcoming hearing. When preparing for the hearing, users can link desired documents to the hearing jacket to be referenced later. The linking of documents is essentially a digital paperclip. These linked documents can be quickly and easily accessed using the cross-references feature, or the linked documents portfolio while in workflow.

Queue Workspaces

The hearing process lifecycle was established based on the typical flow for a case hearing event. Users are not restricted to moving hearing jackets sequentially through the process, and may use any of the queues in any order and at any time. The following queue workspaces are configured for the hearing process:

- **Hearing Jacket Init**

This queue workspace holds hearing jackets that have been created and are awaiting further preparation.

- **Prep for Hearing**

This queue workspace is used when court staff users are ready to perform hearing preparation activities. These activities may include linking necessary documents, making notes for the jurist, or document preparation.

- **Jurist Hearing Review**

This queue workspace holds those hearing jackets that court staff have prepared for further review by the appropriate jurist in advance of the upcoming hearing.

- **Prep Complete**

This queue workspace is used to keep prepared and reviewed hearing jackets in workflow and easily accessible until the day of the hearing.

- **Hearing Docket**

This queue workspace holds all hearing jackets that have a hearing date set for the current date. The system will automatically place the hearing jackets into this queue for the day's scheduled hearings.

- **Bench**

Court staff will move hearing jackets into this queue workspace when cases are ready to be called and provided to the hearing officer. This is akin to handing the jurist files while on the bench. Where there are multiple items in the queue, specific hearing jackets may be marked as priority for the hearing officer. While in this workspace, the hearing officer can review linked documents, make notes, and sign any necessary documents.

- **Hearing Complete**

This queue workspace holds hearing jackets for completed hearings or for those cases that need further processing, such as document preparation or scheduling activities.

Probation (*District and Circuit Only*)

The *MiFILE DMS* will have a lifecycle and queue workspaces to accommodate the activities of the district court and circuit court-family division. The details of this functionality are still being compiled and will be provided when complete.

Friend of the Court (Circuit Only)

The *MiFILE DMS* will have a lifecycle and queue workspaces to accommodate the activities of friend of the court. The details of this functionality are still being compiled and will be provided when complete.

Changing the Queue Workspace Displays

While users are in *MiFILE DMS* workflow, they have the ability to dynamically change how the documents are visualized in the queue workspace. Users can accomplish this through the use of grouping and filtering.

Grouping

This feature enables the user to organize the documents in the queue workspace in discrete groups, such as by judge, case type, or court docket. This enables users to organize their work in the way that is most relevant and effective.

Dynamic User Filtering

Users may leverage dynamic user filtering to restrict the number of items that are visible in the queue workspace using specified filter criteria. This filtering feature is similar to the column filtering experience in Microsoft Excel.

Preset Filtering

In addition to dynamic user filtering, *MiFILE DMS* provides several preset filters that can be applied to the queue workspace to change the manner in which the document information is displayed in the queue, such as changing the columns displayed.

Moving Multiple Documents with Routing Slips

MiFILE DMS allows users to route (i.e. move) documents in the workflow from one queue workspace to another. Users desiring to move multiple documents at once will use a Routing Slip eForm, which acts as a digital paperclip. The user can create the routing slip with the touch of a button and link the desired documents. The routing slip can then be moved through the workflow for ease reference to a group of multiple documents.

Tagging a Specific User to a Document

When it is necessary to get documents to a specific individual for review or further processing, users can use the Tag User feature. With the click of a button, a user can tag another user, thereby sending the document to the personal workbox queue of the tagged user for further processing or review. When necessary, the users can add a sticky note providing further information or instruction. This feature enables users to quickly and easily access documents that are in need of their specific attention.

Organizing Work Using Court-Created Court Dockets

MiFILE DMS provides each court with the flexibility to create and manage their own custom court dockets in JusticeTech. This feature allows courts to create court dockets such as show cause, personal protection, or drug court to which the court can assign cases. This enables users to organize documents within workflow based on the court docket when desired. Users can quickly and easily modify or assign a case to a court docket with the click of a button.

Document Creation and Preparation within MiFILE DMS

MiFILE DMS will allow users to generate documents such as court forms using templates and case data stored in *MiFILE DMS*. Implementation of this functionality is anticipated as a future enhancement to *MiFILE DMS*.

eNoticing/eServicing of Documents

Court eNoticing / eServicing

MiFILE DMS enables court users to easily send electronic notice or serve documents on parties and attorneys on the case that are MiFILE registered users. A report is available to review the electronic notice of service details.

Retrieving eService History

MiFILE DMS users can quickly and easily access the electronic service history for any filer-served document by clicking the appropriate task button. The user will be given the e-mail addresses of the MiFILE users that were e-served and the time of service.

MiFILE DMS Personal Page Workspace

MiFILE DMS allows each user to save shortcuts to queues, files, documents, or custom queries to their personal workspace for easy access. When saved to the personal workspace, frequently accessed items are available at the click of a button.

MiFILE DMS Local Court Dashboards

For local court system administrators, *MiFILE DMS* provides several preconfigured informational dashboards listed below. The data from these dashboards can be copied, printed, or exported to Excel. See [Appendix B](#) for additional details.

- **CMS Integration Overview**
This dashboard provides the status of documents that are being sent to the CMS.
- **CMS Integration Status**
This dashboard provides the current status of all documents that are pending in the MiFILE system integration layer.
- **Court Statistics**
This dashboard provides the number of currently pending filings by queue workspace and date.
- **Document Import Report**
This dashboard provides the number of documents that have been imported into *MiFILE DMS* via scanning or browsing features discussed above.
- **Filing Review Report**
This dashboard provides court user actions within the filing review lifecycle.
- **Financial Information**
This dashboard provides the fees collected for the filings received by the court.
- **Financial Summary**
This dashboard provides aggregate collected fees over a specified time.

- **Hold for Payment Status**

This dashboard provides the filings that MiFILE has received from the user, but that are awaiting further processing by the payment processor before being sent to the court.

- **Signed Documents**

This dashboard provides the documents that have a judicial signature applied.

- **Locked Documents**

This dashboard provides the documents that have been locked due to incorrect user behavior.

- **Processing Times**

This dashboard provides the time it takes to perform various application system processes, such as how long it takes for documents to move from filer submission to the court's filing review for processing.

- **Processing Times – OnBase to NDC**

This dashboard provides the time it takes for *MiFILE DMS* to receive a response from the court's CMS that information was successfully transmitted.

- **Reconciliation Report**

This dashboard provides the filings that were accepted by the court during a particular time. Information provided includes case details, filing fees, and CMS codes.

- **Workflow Status Report – Clerk View**

This dashboard provides documents that are currently in filing review queues waiting to be accepted or rejected by court staff.

- **Workflow Status Report – Judicial View**

Like the clerk view dashboard, this dashboard provides documents that are currently in the filing review queues. However, this dashboard information may be filtered based on the assigned judge.

Record Retention of Court Documents in MiFILE DMS

MiFILE DMS will adhere to all SCAO-established record retention and disposal schedules.

Public Access to Court Documents in MiFILE DMS

MiFILE DMS will be configured to permit public users to search and access the court's files that are publicly accessible.

Appendix A – DMS and OnBase Terminology

Bundle: A group of filings that have been submitted together in a single transaction via MiFILE.

Coding: The OnBase activity typically performed by court clerks whereby a document to be accepted into the case file is assigned a set of attributes, like Document Type and CMS Code, to be passed to the CMS and EDMS.

Custom Queries: Custom queries are saved searches that you can easily go back and execute as needed. The custom queries available to the court are part of the solution and cannot be edited by court users.

Document Composition: This is a process within OnBase that permits the automated creation of documents based upon existing keyword/court data and clerk entry. The templates used for Document Composition are maintained by SCAO.

Document Type: Document types are the lowest level of category for a document in OnBase. In the MiFILE solution, the document types are the names of the filing types that come across, like *CC-Garnishment* (CC stands for circuit court) or *CC-Subpoena*.

Document Type Group: Document type groups are the highest level for categorizing documents in OnBase. In MiFILE, court types comprise the main document types, e.g. Circuit Court Case File Documents, District Court Case File Documents, and Probate Court Case File Documents. There is another document type group – Filing Review Documents – for documents that are currently in filing review, but have not officially been filed into the case.

Dynamic Stamp: This is a special stamp within OnBase that court staff can use to directly annotate documents with additional text.

e-Notice: For documents that are directly imported into OnBase by court staff, an electronic notice (or e-Notice) can be sent by court staff to alert case parties to a case filing.

JusticeTech: The administrative application is available in OnBase to court system administrative users and allows for the creation of users, configuration of roles, workflow routing, and numerous other configurable features.

Keywords: Keywords are special values associated with a document that can be used for easier searching, filtering, and document identification. In MiFILE, dozens of keywords are available for use. Some of the most commonly used are: Case Number, Case Title, and Judge.

LifeCycle: A logical grouping of queues and tasks designed to perform a business process.

OnBase: The portion of the MiFILE solution that court staff interact with; OnBase is a software product created by [Hyland Software](#).

Queue: A container where documents wait for work to be performed on them. Clerk Review, Judicial Clerk Review, and the items beneath them (within the Filing Processing lifecycle) are queues where documents can be worked with or routed.

Route: A path between one queue/lifecycle and another. For example, routing a document from the Clerk Review queue to the Judicial Clerk Review queue. This would be akin to a clerk walking a filing over to a judicial clerk's desk and dropping it into the inbox in a paper-based court.

TrueFiling: The portion of the MiFILE solution that filers interact with on the web to submit filings to the court and make payments.

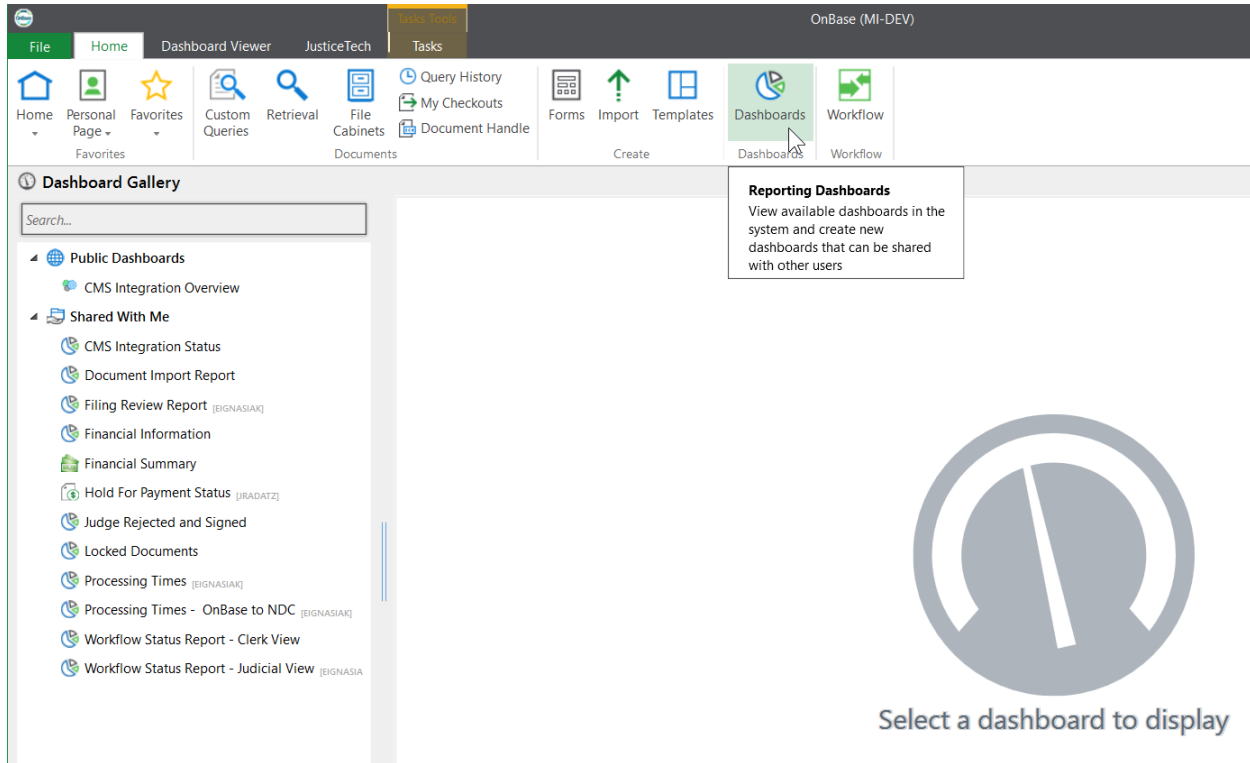
Unity Indexer: The electronic form displayed when viewing a document within a bundle in OnBase. The Unity Indexer form is where clerks specify whether to accept, reject, or route a document, and to code it as necessary for transmission to the Case Management System (CMS) or the Document Management System (DMS).

Virtual Print: An OnBase feature that allows documents to be imported into the system directly from Microsoft Word, Adobe Reader, or other applications by way of a standard Print process. Instead of sending the document to a physical printer, the document is sent into OnBase.

Workflow: Workflow is where the interaction with recently submitted documents takes place. The workflow feature allows us to route, reject, approve, and process documents submitted to a case.

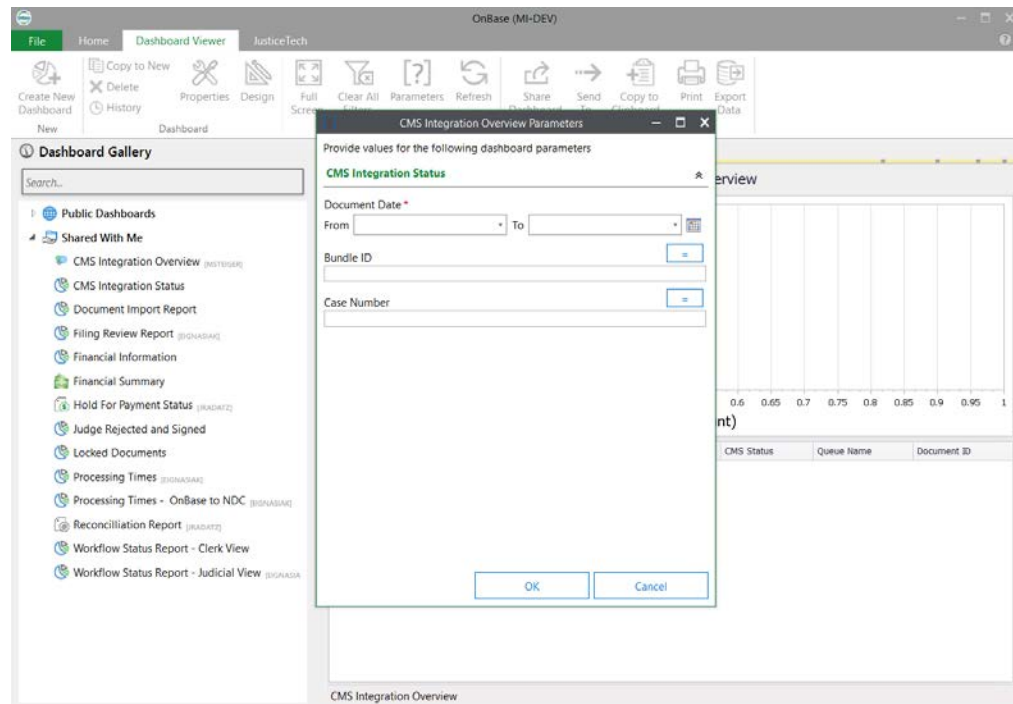
Appendix B – MiFILE DMS Local Court Dashboards

A series of reports have been preconfigured within MiFILE for court administrators to use. These are found behind the Dashboards icon in the ribbon of OnBase's Home tab.



CMS Integration Overview

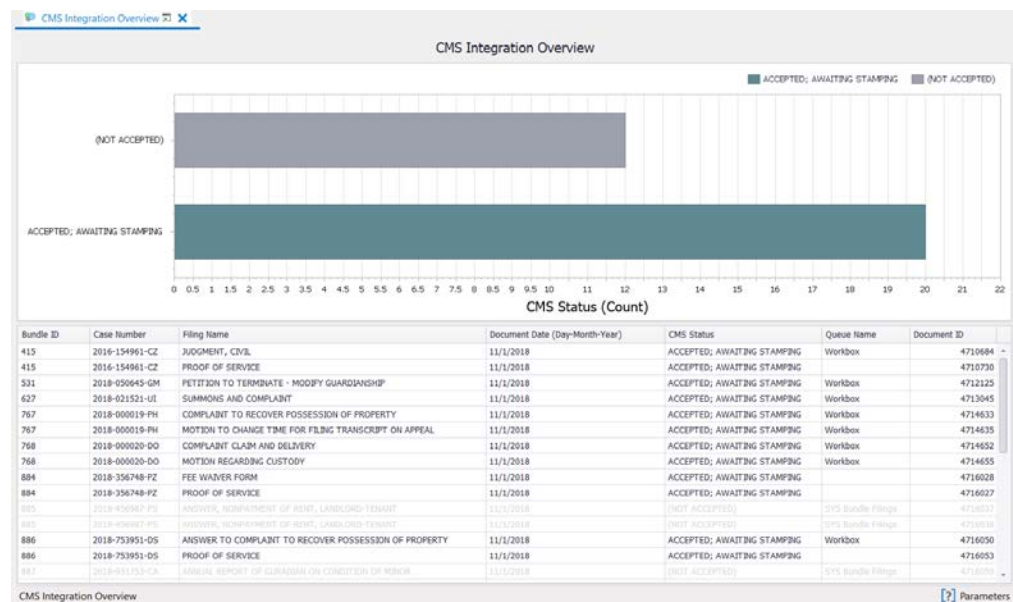
The CMS Integration Overview dashboard provides information about the status of documents being sent to the CMS. The report allows you to filter by case number and/or a date range, so this dashboard is useful for troubleshooting issues in the past.



The screenshot shows the OnBase (MI-DEV) application window. The 'Dashboard Viewer' tab is active, displaying the 'Dashboard Gallery'. A 'CMS Integration Overview Parameters' dialog box is open, prompting the user to provide values for the following dashboard parameters:

- Document Date: From [] To []
- Bundle ID: []
- Case Number: []

The dialog box has 'OK' and 'Cancel' buttons at the bottom. The background shows the 'Dashboard Gallery' with a search bar and a list of public dashboards, including 'CMS Integration Overview', 'CMS Integration Status', 'Document Import Report', 'Filing Review Report', 'Financial Information', 'Financial Summary', 'Hold For Payment Status', 'Judge Rejected and Signed', 'Locked Documents', 'Processing Times', 'Processing Times - OnBase to NDC', 'Reconciliation Report', 'Workflow Status Report - Clerk View', and 'Workflow Status Report - Judicial View'.



CMS Integration Status

The CMS Integration Status dashboard shows the current status of all documents currently being processed by MiFILE's integration layer, and how long they are residing in the various queues involved in the CMS integration.



Note: If all integration items have been successfully sent to the CMS, this report will be empty.

Court Statistics

The Court Statistics dashboard displays, in a cascading format, the bundles and filings that are currently in progress per queue. Use the (▼) icon to expand each level.

Note: The results are cascading in the following format:

- > Queue
 - > Document Name
 - > Document Handle

Filings that need to be completed

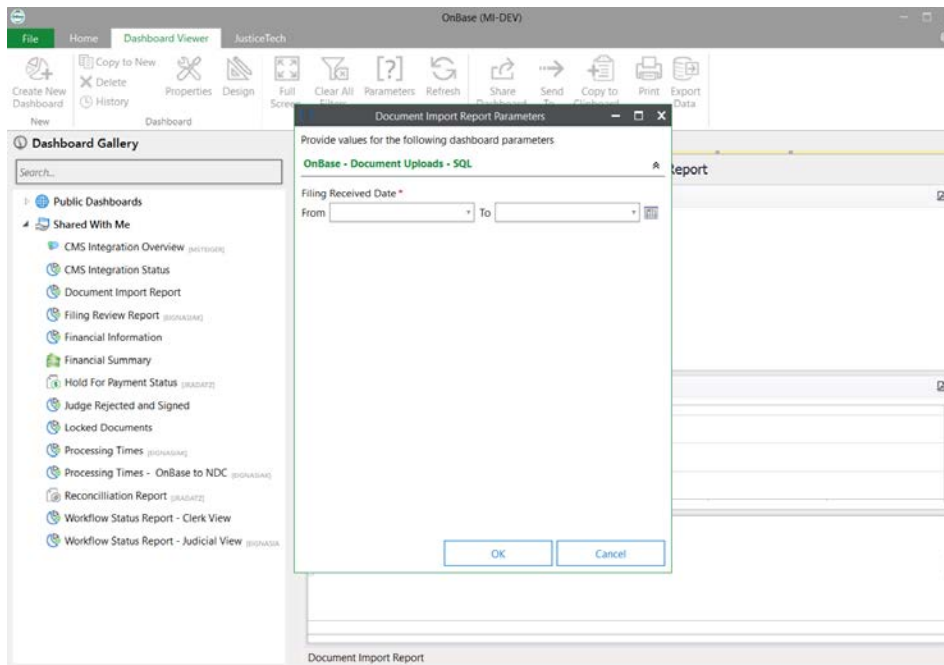
	12/3/2019	12/4/2019	12/23/2019	1/21/2020	Grand Total
SYS Bundle Filings Total	1	1	1	2	5
▶ 2007-123456-XX - TEST - PAID - - - 12/4/...		1			1
▼ 2007-123456-XX - TEST FILING - PAID - - ...			1		1
15337551			1		1
▶ 2007-123456-XX - TESTING 3 FOR RAN - P...	1				1
▶ 2018-444100-CZ - MOTION AND, OR ORD...				1	1
▶ TrueFiling Proof of Service - OAKLAND CO...				1	1
▼ SYS Hold for New Case Total				1	1
▶ TEMP-CMDCCDRX - COMPLAINT (REQUEST...				1	1
Grand Total	1	1	1	3	6

Bundles that need to be completed

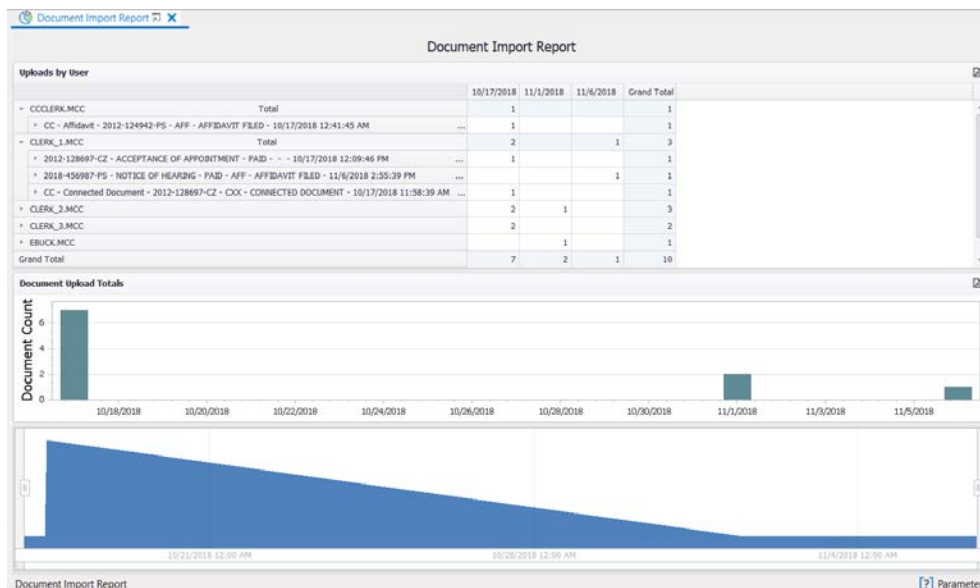
	12/3/2019	12/4/2019	12/23/2019	1/21/2020	Grand Total
Clerk Review Total	1	1	1	1	4
▶ Bundle for Case 2007-123456-XX; PEO...			1		1
▼ Bundle for Case 2007-123456-XX; PEO...	1				1
15334847	1				1
▶ Bundle for Case 2007-123456-XX; PEO...		1			1
▶ Bundle for Case 2018-444100-CZ; - S...				1	1
▼ New Case Total				1	1
▶ Bundle for Case TEMP-CMDCCDRX; SA...				1	1
Grand Total	1	1	1	2	5

Document Import Report

The “Document Import Report” dashboard displays a summary of instances where a document was imported into OnBase. Court system admins can search based upon the date of import:

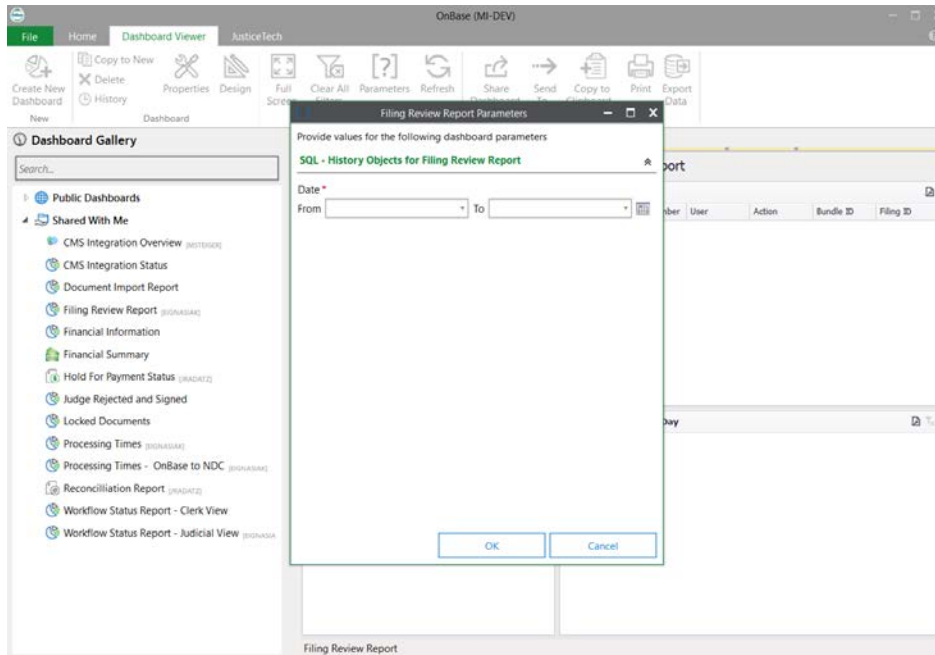


The report shows when a document was imported into OnBase, which user imported it, and document metadata like the case it is associated with, the document type, etc.

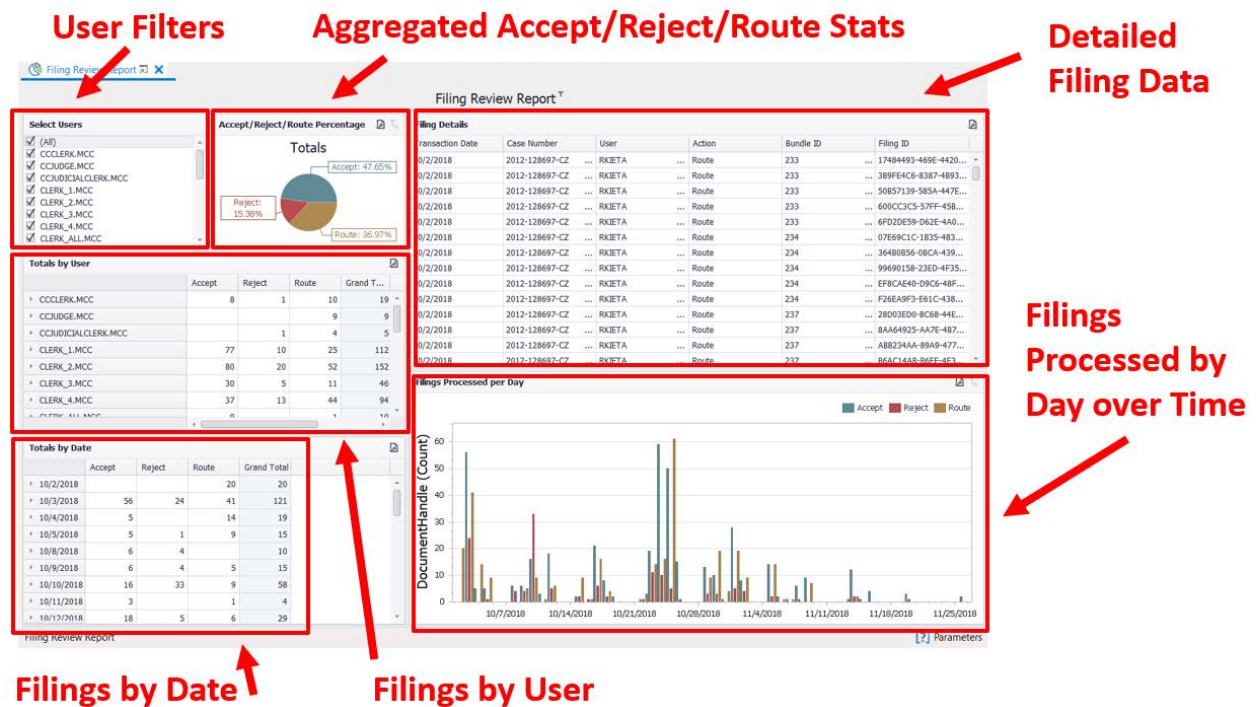


Filing Review Report

The Filing Review Report dashboard is an extremely comprehensive look at user actions within the Filing Review lifecycle. All accept, reject, and route actions are shown here, and can be filtered by user and/or date range.

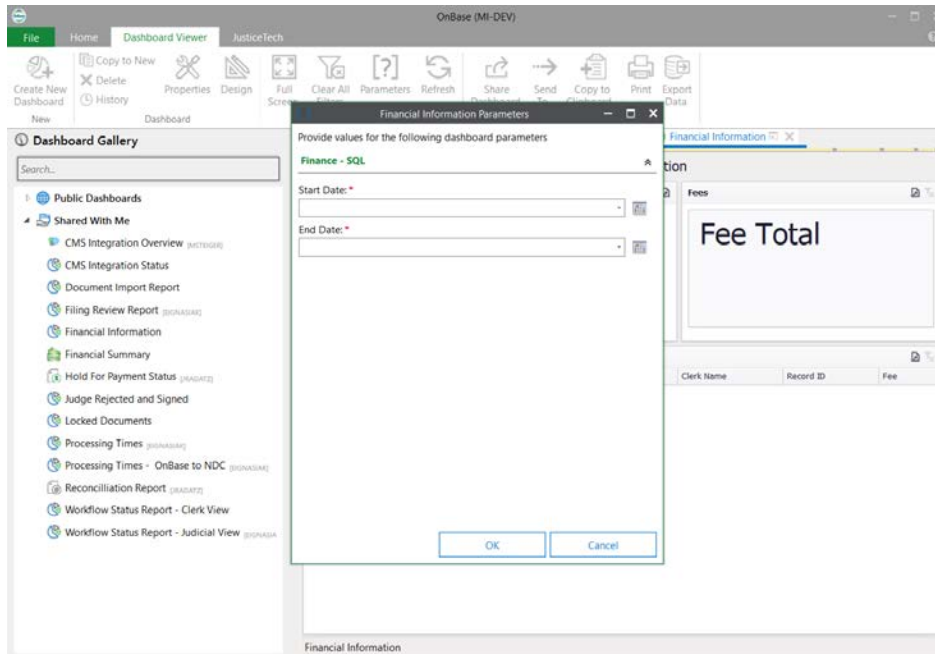


The dashboard shows a variety of aggregated statistics and filters for data.



Financial Information

The Financial Information dashboard allows you to see the fees collected on every filing coming into the system during a specified date range.



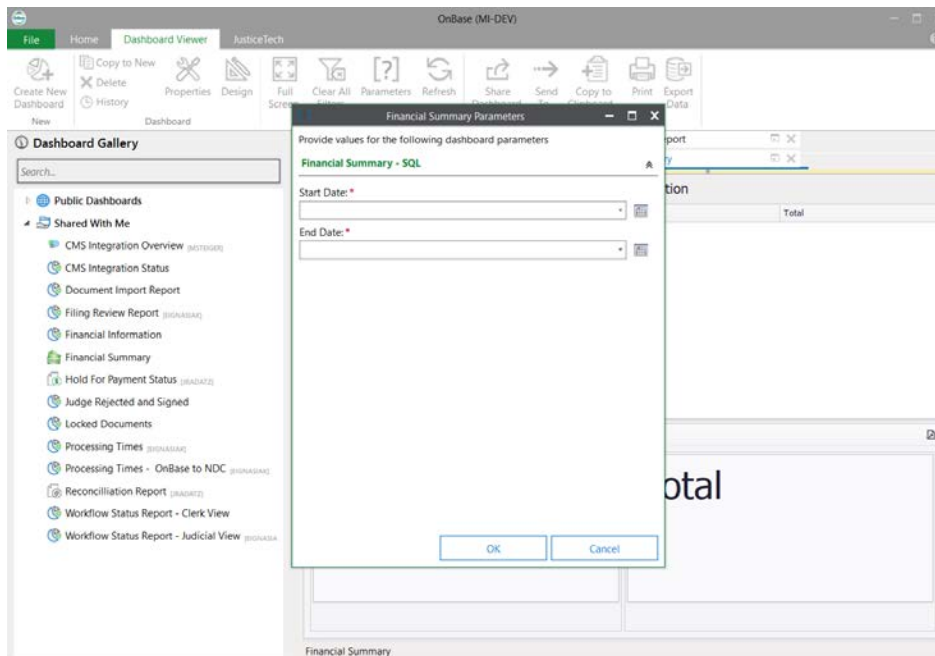
Information can be filtered down by date over a given date range.

The screenshot shows the OnBase (MI-DEV) Financial Information dashboard. The 'Select Date(s)' section is set to '2018'. The 'Fees Pivot' table shows a total fee of \$175 for the year 2018. The 'Fees' table shows a total fee of \$175. The 'Fees Details' table lists the following data:

Date	Filing Type	Act Ref Code	Case No	Clerk Name	Record ID	Fee
10/22/2018	TRUEFILING PROOF OF SERVICE	...	1012-001056-CA	...	E7168525-0713-4945-B4BC-7A402D014500	\$0
10/22/2018	TRUEFILING PROOF OF SERVICE	...	1012-001056-CA	...	E7168525-0713-4945-B4BC-7A402D014500	\$0
10/22/2018	NEW CASE FILING	...	1012-001056-CA	Rebekka Kieta	809F3599-4EA0-400B-A0FE-750AF78765E7	\$175
10/22/2018	NEW CASE FILING	...	1012-001056-CA	Rebekka Kieta	809F3599-4EA0-400B-A0FE-750AF78765E7	\$175
10/23/2018	TRUEFILING PROOF OF SERVICE	...	1012-001056-CA	...	E7168525-0713-4945-B4BC-7A402D014500	\$0
10/23/2018	TRUEFILING PROOF OF SERVICE	...	1012-001056-CA	...	E7168525-0713-4945-B4BC-7A402D014500	\$0
10/23/2018	OTHER	...	2018-000001-05	Clerk_2	0860C356-1716-401A-A66C-21909EC8120	\$0
10/23/2018	APPEAL FROM CIRCUIT WITH COPY OF CLAIM/APPLICATION	...	2018-000001-05	Clerk_2	9160AF3C-6448-4C18-9288-24A3A92A002E	\$25
10/23/2018	OTHER	...	2018-000001-05	Clerk_2	9872C930-06E7-4292-8E49-036E74D1F745	\$0
10/23/2018	NEW CASE FILING	...	2018-000002-N5	Clerk_2	7180F15A-1CA7-4F00-AC72-C800F6812662	\$175
10/23/2018	ADDITIONAL MOTION	...	2018-000002-N5	Clerk_2	9081531D-C3FA-485D-BA84-59357A515018	\$0
10/23/2018	OTHER	...	2018-000002-N5	Clerk_2	904E18AE-1809-4475-A791-9506442C2F2F	\$0
10/23/2018	NEW CASE FILING	...	2018-000004-NP	Clerk_2	87C81CB5-E218-42C4-8904-8E658E29FAC	\$175
10/23/2018	NEW CASE FILING	...	2018-010225-N2	Clerk_4	C54980D0-5CAC-4A10-63C2-8BF76817A1CA	\$175
10/23/2018	NEW CASE FILING	...	2018-000006-NC	Clerk_2	8E31D2C1-E79C-4D3B-A71C-0867647CD259	\$175
10/23/2018	NEW CASE FILING	...	2018-000007-NI	Clerk_2	466A3880-CA40-4281-8819-4386A1FADFF4	\$175
10/23/2018	OTHER	...	2018-000008-NH	Clerk_2	655E7CCE-7F4E-4E3A-86E1-C88E88F603F8	\$0

Financial Summary

The Financial Summary dashboard is a very basic report that aggregates all fees collected over a specified date range.



Filing fees collected are broken up based on Cash Code, which is configured on the TrueFiling filing types tab in the JusticeTech configuration.

Financial Information		
Product Type	Quantity	Total
	6	\$745.08

Totals	
Quantity	Total
6	\$745.00

Hold for Payment Status

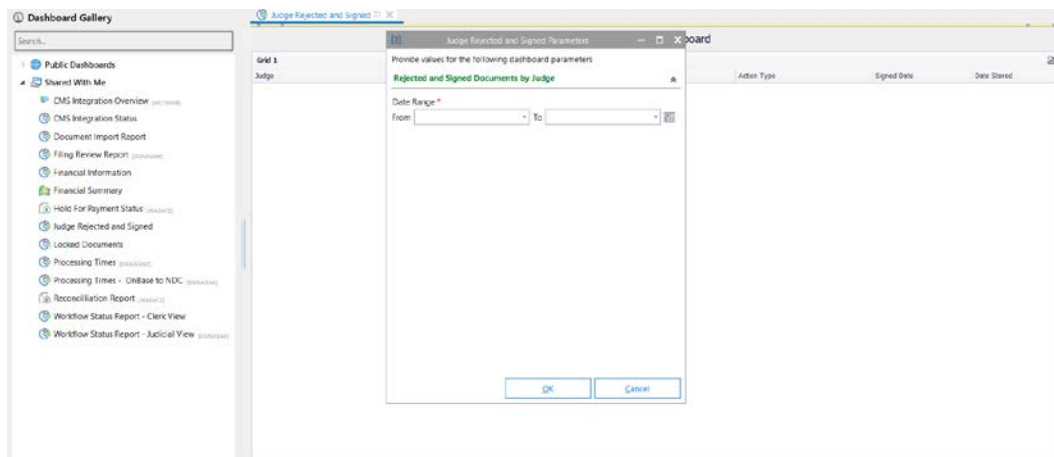
Once a filing is received, OnBase puts it into the Hold for Payment Status queue and waits for a status update from the payment processor before the filings are allowed into Filing Review. The dashboard provides metrics on any filings currently in this state and how long they've been there, which is effective information for diagnosing payment-related problems.

Hold For Payment Status						
Document...	Case Number	Bundle ID	Filing Name	Entry Date	Waiting for (Minutes)	Filing Received Date
4716364	TEMP-VOY9LCH9	914	CASE INITIATION FORM	11/7/2018 2:34 PM	67.5K	11/1/2018 3:16 PM
4717141	2016-154961-CZ	998	EOS-ORGANIZATIONAL-CHECKUP	11/7/2018 5:15 PM	67.4K	11/7/2018 5:12 PM
4717204	2018-032564-DC	986	PROPOSED MOTION REGARDING CUSTODY	11/7/2018 5:50 PM	67.4K	11/7/2018 2:21 PM
4717209	2018-032564-DC	986	MOTION AND/OR ORDER TO SHOW CAUSE	11/7/2018 5:51 PM	67.4K	11/7/2018 2:20 PM
4717211	2018-032564-DC	986	BRIEF	11/7/2018 5:51 PM	67.4K	11/7/2018 2:20 PM
4717214	2018-032564-DC	986	NOTICE OF HEARING	11/7/2018 5:50 PM	67.4K	11/7/2018 2:21 PM
4717218	2018-121218-CR	967	TEST STAMP	11/7/2018 5:51 PM	67.4K	11/6/2018 3:35 PM
4717220	2018-121218-CR	981	JUDGMENT, CIVIL	11/7/2018 5:51 PM	67.4K	11/7/2018 1:14 PM
4717224	2018-121214-AN	988	14-DAY NOTICE, TRAFFIC	11/7/2018 5:51 PM	67.4K	11/7/2018 2:23 PM
4717250	2018-121215-PP	991	AFFIDAVIT AND ORDER FOR RESTRICTED DRIVER'S LICENSE	11/7/2018 5:52 PM	67.4K	11/7/2018 2:44 PM
4717251	TEMP-7H0GW698	989	SUMMONS AND COMPLAINT	11/7/2018 5:52 PM	67.4K	11/7/2018 2:38 PM
4717252	TEMP-7H0GW698	989	MOTION REGARDING CUSTODY	11/7/2018 5:53 PM	67.4K	11/7/2018 2:38 PM
4717253	TEMP-7H0GW698	989	PROPOSED ORDER REGARDING PARENTING TIME	11/7/2018 5:52 PM	67.4K	11/7/2018 2:38 PM
4717255	TEMP-7H0GW698	989	NOTICE OF HEARING	11/7/2018 5:52 PM	67.4K	11/7/2018 2:38 PM
4717257	2016-154961-CZ	997	EOS-ORGANIZATIONAL-CHECKUP	11/7/2018 5:53 PM	67.4K	11/7/2018 4:25 PM
4717290	2016-154961-CZ	999	MOTION AND, OR ORDER TO SHOW CAUSE	11/8/2018 8:41 AM	66.5K	11/8/2018 8:37 AM
4717291	2016-154961-CZ	999	GARNISHEE DISCLOSURE	11/8/2018 8:41 AM	66.5K	11/8/2018 8:37 AM
4717292	2016-154961-CZ	999	COMPLAINT OR MOTION AND AFFIDAVIT TO REVOKE ACKNOWLEDGMENT OF PARENTAGE	11/8/2018 8:41 AM	66.5K	11/8/2018 8:38 AM
4717305	2016-154961-CZ	1002	MOTION AND, OR ORDER TO SHOW CAUSE	11/8/2018 8:47 AM	66.5K	11/8/2018 8:44 AM
4717316	2016-154961-CZ	1004	FINANCIAL AFFIDAVIT	11/8/2018 9:00 AM	66.4K	11/8/2018 8:57 AM
4717323	TEMP-41RRZ823	1008	COMPLAINT CLAIM AND DELIVERY	11/8/2018 10:25 AM	66.4K	11/8/2018 10:23 AM
4717324	TEMP-41RRZ823	1008	MOTION FOR ALTERNATE SERVICE	11/8/2018 10:26 AM	66.4K	11/8/2018 10:23 AM
4717331	2018-032564-DC	1010	MOTION REGARDING CUSTODY	11/8/2018 10:49 AM	66.3K	11/8/2018 10:46 AM
4717332	2018-032564-DC	1010	PROPOSED CUSTODY ORDER	11/8/2018 10:50 AM	66.3K	11/8/2018 10:46 AM
4717340	TEMP-C700P1 M7	1012	COMPLAINT	11/8/2018 10:56 AM	66.3K	11/8/2018 10:53 AM

Documents	Oldest (Minutes)	Average Wait ...
34	67.5K	66.8K

Signed Documents

This dashboard displays any instances of a judge using the Reject Case ad-hoc task or using the e-signature note type on a document (e.g. when signing an order) over a provided date range. While this feature is available, judges should not be rejecting cases.



This dashboard displays the judge's user ID, the case number, the document, the action, and the date the action took place.

Signatures Dashboard						
Judge	Case Number	Document Name	Action Type	Signed Date	Date Stored	
CCJUDGE.MCC	1012-001056-CA	1012-001056-CA - GARNISHEE DISCLOSURE - REJECTED - GSR - GARNISHME...	Reject	12/24/2018	12/24/2018	

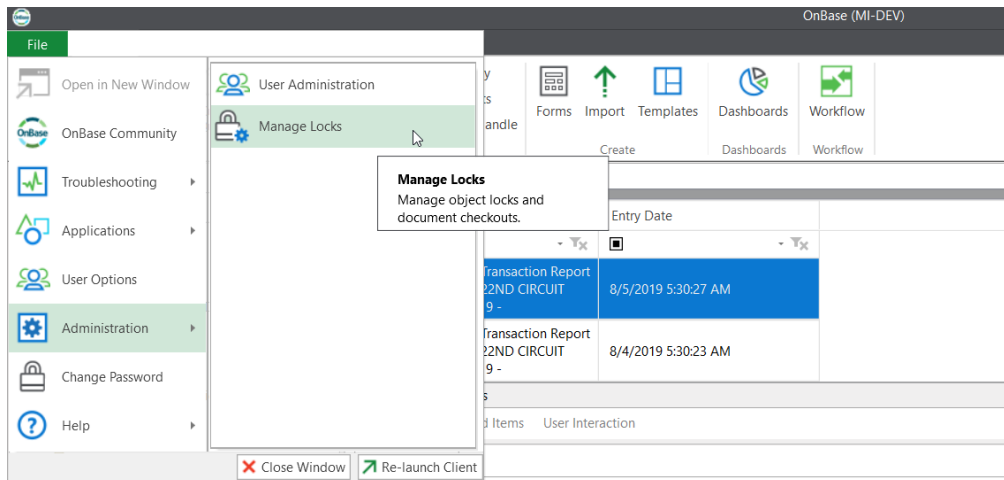
Locked Documents

Occasionally, a user incorrectly closes out of OnBase while a document is open, or some other issue occurs that results in a lock remaining on a document long after the user stopped interacting with it. The Locked Documents dashboard is a good place to troubleshoot any issues with locked documents.

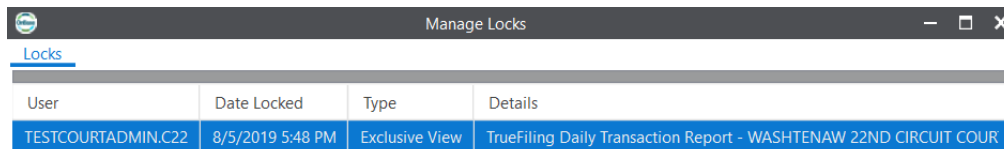
Locked Documents CCCOURTADMINISTRATOR.MCC						
Users		Documents				
		Username	Date Locked	Lock Type	Document Title	Item Number
☒ (All) ☒ CCCOURTADMINISTR		CCCOURTADMINISTRATOR.MCC	12/24/2018 1:03:21 PM	Document	2016-154961-C2 - AD-HOC PAYMENT - PAID - - - 10/12/2018 2:48:25 PM	4710855

Unlocking Locked Documents

Court administrators do not have permissions to remove the locks directly, but they can prompt the user to remove the lock themselves via the Manage Locks screen under File > Administration.



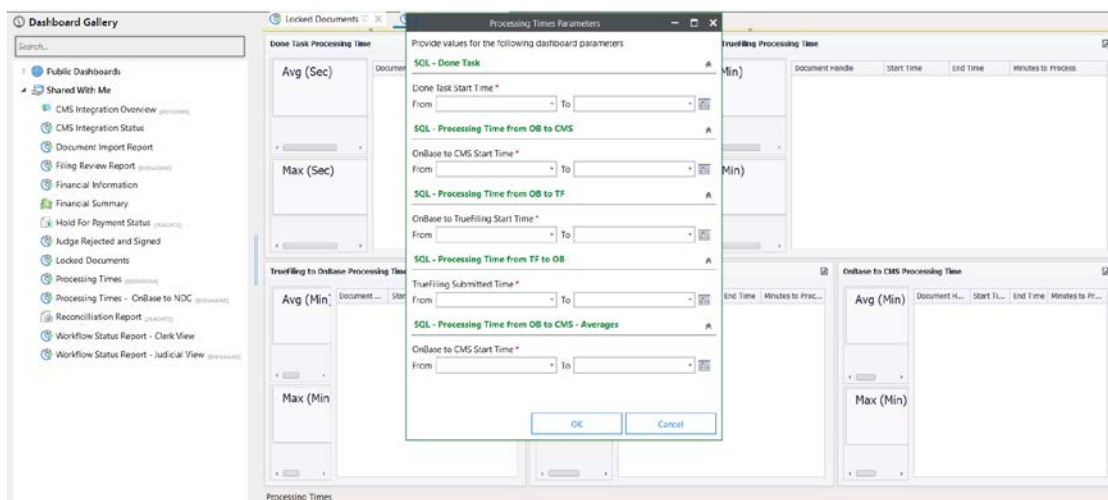
By clicking on the lock and hitting the Remove Selected button, a lock can be removed so other users can access the document.



Note: In situations where a user cannot remove the lock themselves, the court administrator can temporarily reset the user's password, log in as them, and remove the lock themselves.

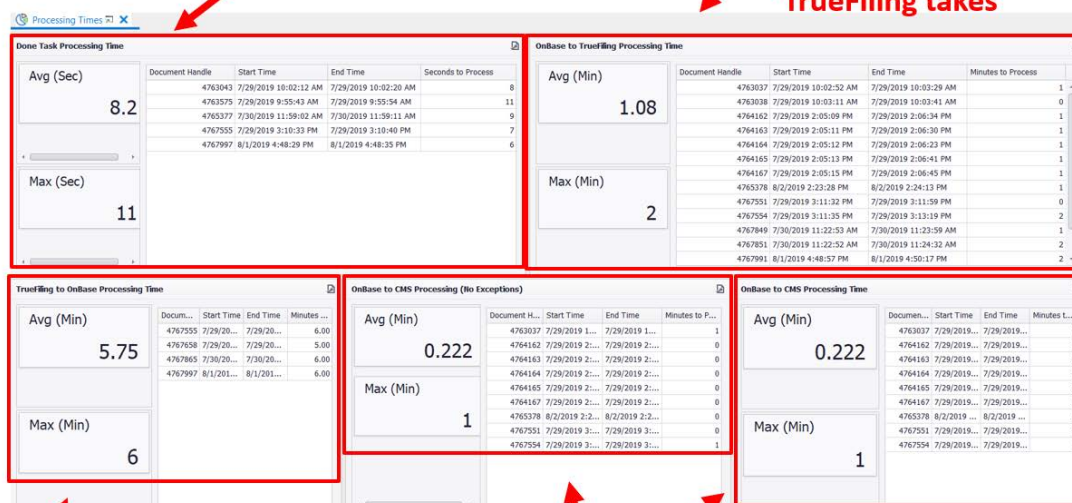
Processing Times

The Processing Times dashboard contains metrics around various filing-related events: how long the Done task takes to execute on a bundle; how long items take to make it into the Filing Review lifecycle from TrueFiling; how long filings coming from OnBase take to get updated in TrueFiling; and how long it takes OnBase to complete the updates it does with the CMS. It takes five sets of dates:



How long all “behind the scenes” processing takes when the Done task is executed

How long integration between OnBase and TrueFiling takes

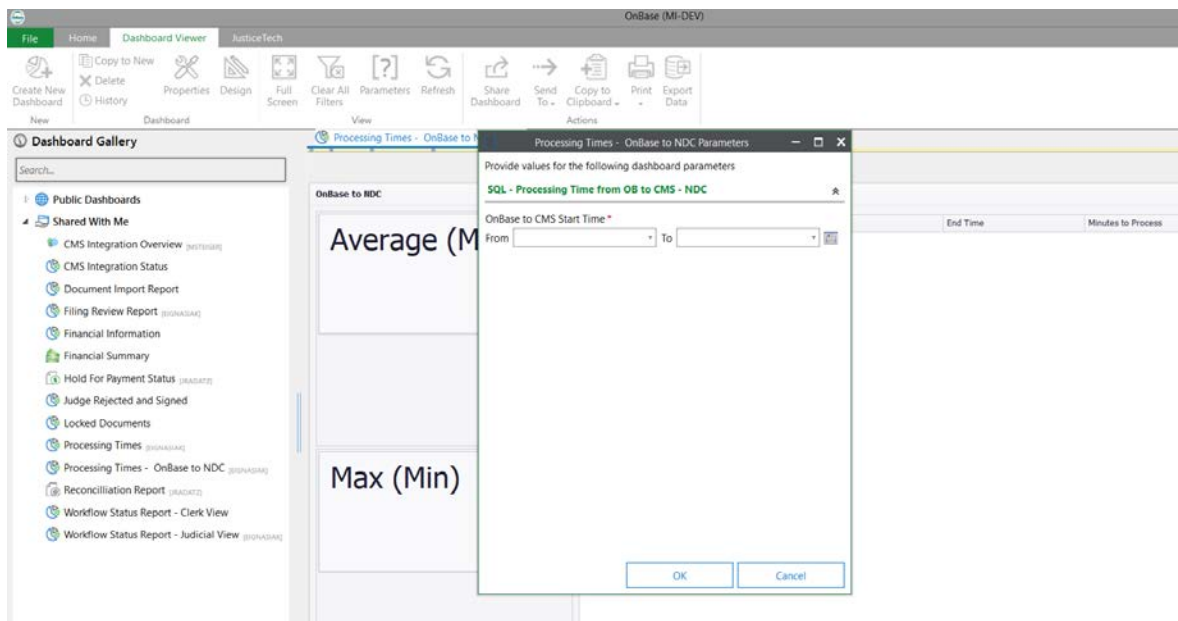


How long items from TrueFiling take to get into OnBase

How long data takes to go from OnBase to the CMS (not counting exceptions)

Processing Times – OnBase to NDC

The OnBase to NDC Variation of the Processing Times dashboard is used to gauge the amount of time it takes OnBase to receive a Notify Docketing Complete (NDC) response from the CMS indicating that the filing was successfully received and processed. A date range for the transmission to the CMS can be provided.



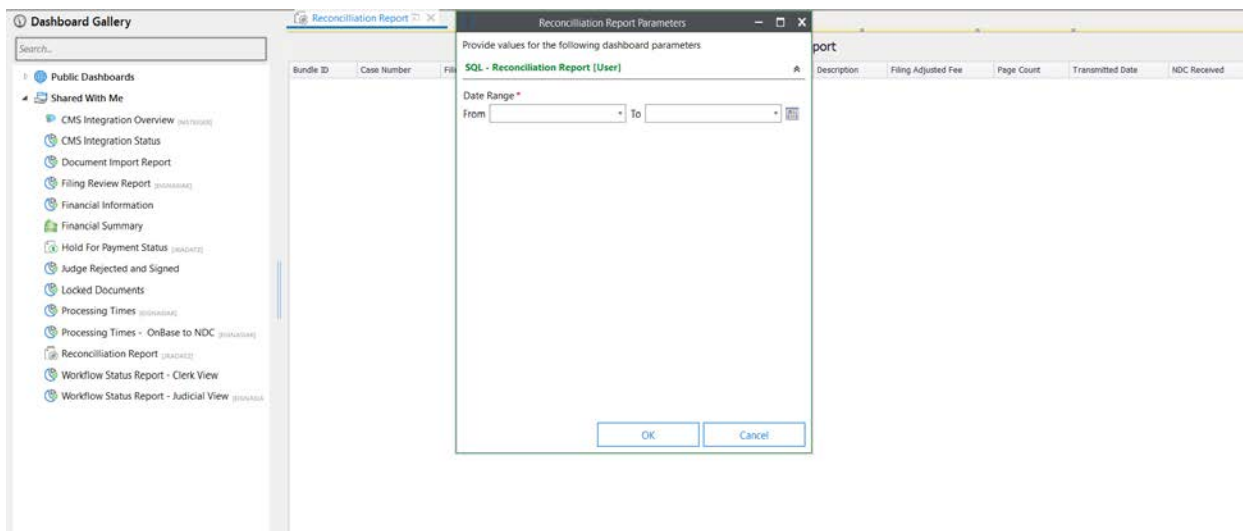
For each CMS transaction during the provided date range, the Start Time, End Time, and length (minutes to process) is shown, along with aggregated statistics over the entirety of the range.

The screenshot shows the 'Processing Times - OnBase to NDC' dashboard. On the left, there are two large boxes displaying aggregated statistics: 'Average (Min)' with a value of 0.222 and 'Max (Min)' with a value of 1. On the right, there is a table with the following columns: 'Document Handle', 'Start Time', 'End Time', and 'Minutes to Process'.

Document Handle	Start Time	End Time	Minutes to Process
4763037	7/29/2019 10:02:52 AM	7/29/2019 10:03:25 AM	1
4764162	7/29/2019 2:05:09 PM	7/29/2019 2:05:19 PM	0
4764163	7/29/2019 2:05:11 PM	7/29/2019 2:05:19 PM	0
4764164	7/29/2019 2:05:12 PM	7/29/2019 2:05:27 PM	0
4764165	7/29/2019 2:05:13 PM	7/29/2019 2:05:22 PM	0
4764167	7/29/2019 2:05:15 PM	7/29/2019 2:05:47 PM	0
4765378	8/2/2019 2:23:28 PM	8/2/2019 2:23:51 PM	0
4767551	7/29/2019 3:11:32 PM	7/29/2019 3:11:52 PM	0
4767554	7/29/2019 3:11:35 PM	7/29/2019 3:12:07 PM	1

Reconciliation Report

The Reconciliation Report produces information about all filings that were accepted by the court during a particular date range.



The Reconciliation Report displays several attributes for each accepting filing, including the Bundle ID, Case Number, Filing Fee, CMS Code, and whether transmission to the CMS was successful.

The image shows a screenshot of the 'Reconciliation Report' dashboard. On the left is a 'Dashboard Gallery' with a search bar and a list of public dashboards, including 'CMS Integration Overview', 'CMS Integration Status', 'Document Import Report', 'Filing Review Report', 'Financial Information', 'Financial Summary', 'Hold For Payment Status', 'Judge Rejected and Signed', 'Locked Documents', 'Processing Times', 'Processing Times - Onbase to NDC', 'Reconciliation Report', 'Workflow Status Report - Clerk View', and 'Workflow Status Report - Judicial View'. The 'Reconciliation Report' is selected. The main area displays a table with the following columns: Bundle ID, Case Number, Filing Record ID, Parent Record ID, Filing Received, CMS Code, Description, Filing Adjusted, Page Count, Transmitted, and NDC Received. The table contains 20 rows of data, showing various filing records with their respective IDs, dates, and statuses.

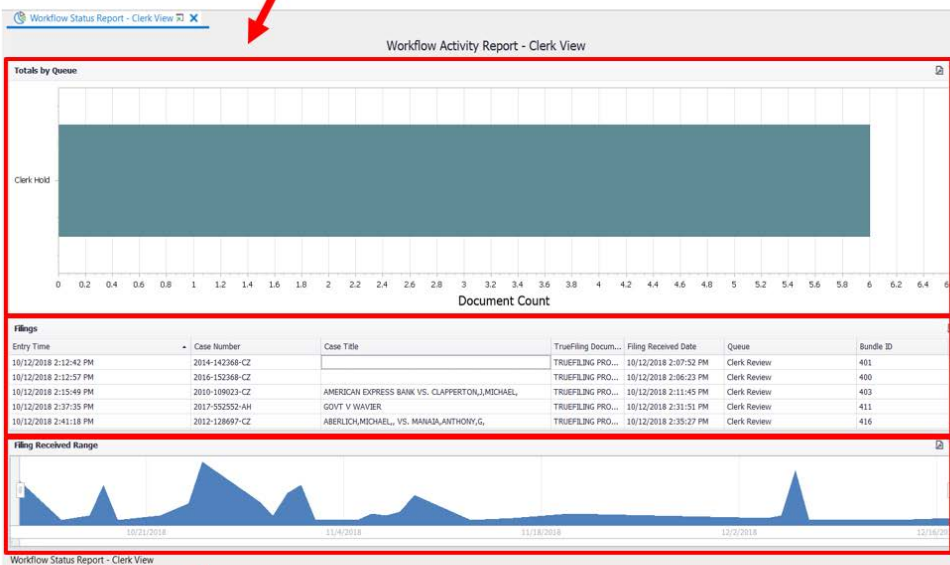
This report is useful for reconciling financials with the CMS.

Workflow Status Report – Clerk View

The Workflow Status Report – Clerk View dashboard contains information regarding all filings currently in Filing Review queues, including when they entered the current queue and when they first entered OnBase. This report is helpful for determining any bottlenecks impacting the processing of filings.



Total documents in each queue

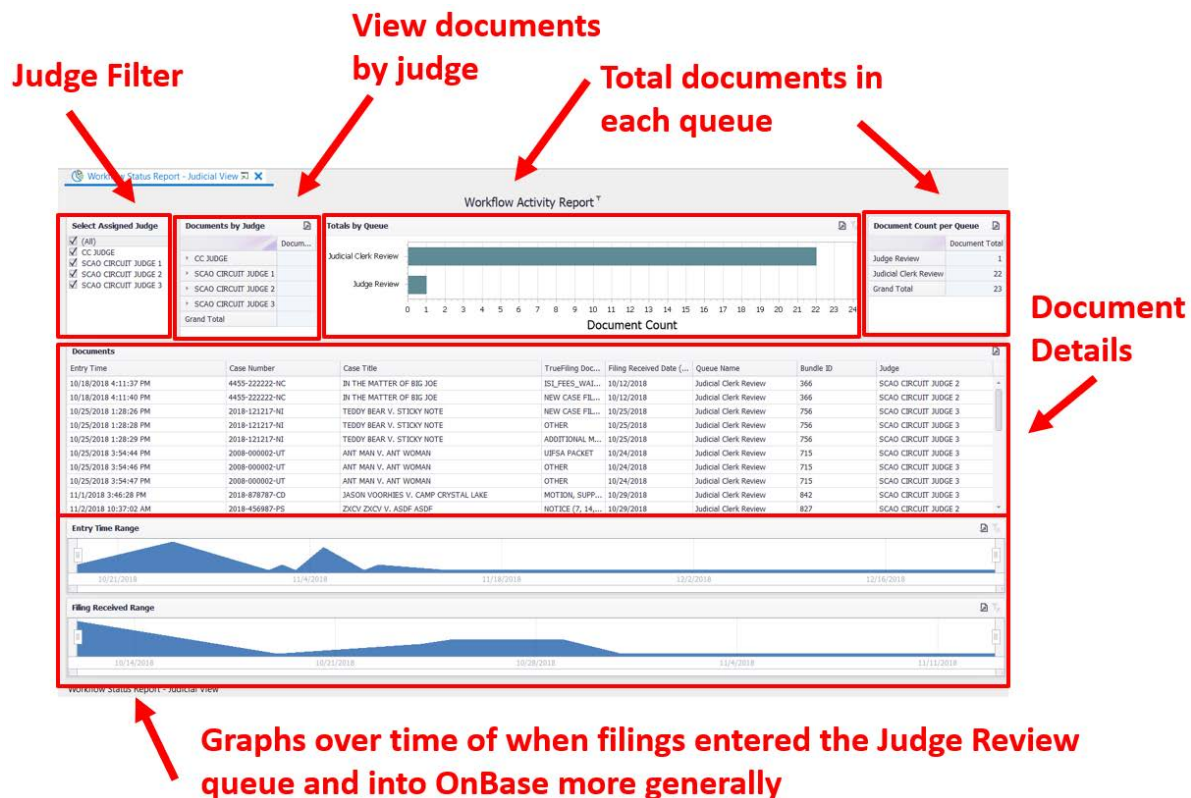
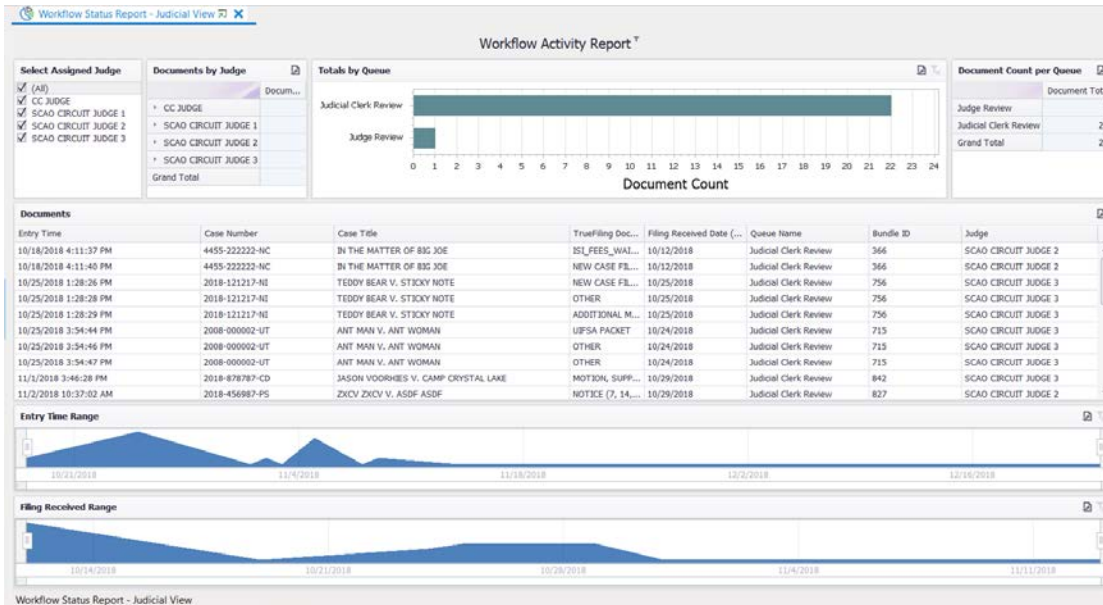


All filings in the Clerk Review or Clerk Hold queues

Graph over the date range of number of filing received per day

Workflow Status Report – Judicial View

The Workflow Status Report – Judicial View is useful to judges since it focuses on documents residing in the Judicial Clerk Review and Judge Review queues. The documents can be filtered by judge, allowing for a narrow view into filings impacting a certain judge's cases.



Appendix C – Example OnBase User Panes Layout

MiFILE DMS is powered by the OnBase. Within OnBase, the user may arrange the various user pane areas in a manner they desire. The following layout example is for illustration purposes only. The labels and information displayed may not appear in the *MiFILE DMS*.

LifeCycles and Queue Workspaces

The shaded area below displays the area in which the user will find the available lifecycle and queue workspaces. Upon selection, the documents in queue will load into the inbox user pane area.

The screenshot shows the OnBase interface with a sidebar on the left containing a 'Life Cycles' pane. This pane is highlighted with a red box and contains a search bar and a list of categories and sub-items. The main area displays the 'Inbox' table with columns for Icon, Case Number, Case Title, Filing Name, Description, and Filing Received Date. Below the inbox table, there is a 'Judge' section with a 'User Interaction' button and a 'Related Items' section with a 'Connected Filings' button. The 'Connected Filings' section displays a table with columns for Icon, Filing Received Date, Filing Name, Description, Bundle ID, and TrueFiling Document.

Icon	Case Number	Case Title	Filing Name	Description	Filing Received Date
	2018-001238-LT	PHIL WENNECK V. ALAN GARNER	BRIEF	BACKFILE	5/16/2019 12:55:53 AM
	2019-123456-LT	TYLER MUSCAT V. DANIEL MOSTEK	MOTION FOR POSSESSION PENDING JUDGME	MOTION TO SET ASIDE POSSE	5/1/2019 12:09:04 PM
	2020-555555-GC	KELLY TAYLOR V. BRANDON WALSH	MOTION TO SUPPRESS EVIDENCE	MOTION TO AMEND COMPLA	4/26/2019 10:16:51 AM
	2019-123452-LT	SNOOP DOGG V. LA LAKERS	MOTION_01	ADJOURNMENT REQUEST FIL	3/26/2019 1:39:18 PM
	2018-610044-GC	JAX TELLER V. CLAY MORROW	MOTION FOR ALTERNATE SERVICE	MOTION FOR INSTALLMENT F	11/9/2018 10:47:51 AM

Icon	Filing Received Date	Filing Name	Description	Bundle ID	TrueFiling Document
	10/19/2018 11:02:35 AM	CASE INITIATION FORM		615	ISL_CASE_INIT_FORM
	10/19/2018 11:02:39 AM	COMPLAINT, NONPAYMENT C	COMPLAINT FILED	615	NEW CASE FILING - C
	5/16/2019 12:54:00 AM	AFFIDAVIT	BACKFILE	3479	OTHER
	5/16/2019 12:54:04 AM	AFFIDAVIT - CONNECTED		3479	CONNECTED FILING

Inbox User Pane

The Inbox user pane is the area in which all of the documents in a selected queue workspace will be displayed. Each document item in the queue will display as a row of data, which may be selected for further viewing.

The screenshot shows the OnBase interface with a sidebar on the left containing a 'Life Cycles' pane. The main area displays the 'Inbox' table with columns for Icon, Case Number, Case Title, Filing Name, Description, and Filing Received Date. Below the inbox table, there is a 'Judge' section with a 'User Interaction' button and a 'Related Items' section with a 'Connected Filings' button. The 'Connected Filings' section displays a table with columns for Icon, Filing Received Date, Filing Name, Description, Bundle ID, and TrueFiling Document.

Icon	Case Number	Case Title	Filing Name	Description	Filing Received Date
	2018-001238-LT	PHIL WENNECK V. ALAN GARNER	BRIEF	BACKFILE	5/16/2019 12:55:53 AM
	2019-123456-LT	TYLER MUSCAT V. DANIEL MOSTEK	MOTION FOR POSSESSION PENDING JUDGME	MOTION TO SET ASIDE POSSE	5/1/2019 12:09:04 PM
	2020-555555-GC	KELLY TAYLOR V. BRANDON WALSH	MOTION TO SUPPRESS EVIDENCE	MOTION TO AMEND COMPLA	4/26/2019 10:16:51 AM
	2019-123452-LT	SNOOP DOGG V. LA LAKERS	MOTION_01	ADJOURNMENT REQUEST FIL	3/26/2019 1:39:18 PM
	2018-610044-GC	JAX TELLER V. CLAY MORROW	MOTION FOR ALTERNATE SERVICE	MOTION FOR INSTALLMENT F	11/9/2018 10:47:51 AM

Icon	Filing Received Date	Filing Name	Description	Bundle ID	TrueFiling Document
	10/19/2018 11:02:35 AM	CASE INITIATION FORM		615	ISL_CASE_INIT_FORM
	10/19/2018 11:02:39 AM	COMPLAINT, NONPAYMENT C	COMPLAINT FILED	615	NEW CASE FILING - C
	5/16/2019 12:54:00 AM	AFFIDAVIT	BACKFILE	3479	OTHER
	5/16/2019 12:54:04 AM	AFFIDAVIT - CONNECTED		3479	CONNECTED FILING

Related Items User Pane

The Related Items user pane provides users access to configured related item document portfolios. When selected, these portfolios will return specified documents that are related to the document that has been selected in the Inbox.

The screenshot displays a software interface with a top menu bar (File, Home, Workflow, Autocatch, Document) and a toolbar with various icons. On the left, a 'Life Cycles' sidebar lists categories like Case Processing, Judicial Assistant, and Clerk Review. The main area is divided into an 'Inbox' and a 'Related Items' pane. The 'Inbox' table lists cases with columns for Case Number, Case Title, Filing Name, Description, and Filing Received Date. The 'Related Items' pane, highlighted with a red box, shows a table of related documents with columns for Icon, Filing Received Date, Filing Name, Description, Bundle ID, and TrueFiling Document. A red double-headed arrow connects a selected case in the 'Inbox' to the 'Related Items' table.

Icon	Case Number	Case Title	Filing Name	Description	Filing Received Date
	2019-101238-1T	PHIL WENAWEC V. ALAN GARNER	SRER	BACKFILE	5/16/2019 12:55:11 AM
	2019-133456-1T	TYLER MUSCAT V. DANIEL MOSTEK	MOTION FOR POSSESSION PENDING JUDGME	MOTION TO SET ASIDE POSSE	5/1/2019 12:09:04 PM
	2019-555555-GC	KELLY TAYLOR V. BRANDON WALSH	MOTION TO SUPPRESS EVIDENCE	MOTION TO AMEND COMPLA	4/24/2019 10:16:51 AM
	2019-133453-LT	SNOOP DOGG V. LA LAKERS	MOTION 01	ADJOURNMENT REQUEST FR	3/26/2019 1:39:18 PM
	2018-610049-GC	JAX TELLER V. CLAY MORROW	MOTION FOR ALTERNATE SERVICE	MOTION FOR INSTALLMENT	11/5/2018 10:47:51 AM

Icon	Filing Received Date	Filing Name	Description	Bundle ID	TrueFiling Document
	10/19/2018 11:02:35 AM	CASE INITIATION FORM	COMPLAINT FILED	615	05 CASE INIT FORM
	10/19/2018 11:02:39 AM	COMPLAINI, NONPAYMENT C	BACKFILE	615	NEW CASE FILING - C
	5/16/2019 12:54:00 AM	AFFIDAVIT	CONNECTED FILING	3479	OTHER
	5/16/2019 12:54:08 AM	AFFIDAVIT - CONNECTED		3479	CONNECTED FILING