



# *Canonical*

Enterprise Tribunal Case Management System

## **Application Overview Guide**

Version 2.0 / Revision 2.5

**Publication Date:**

May 18, 2005

**NO PART OF THIS MATERIAL OR ANY TRIBUNAL SYSTEMS MATERIAL AND WORK MAY BE REPRODUCED OR TRANSMITTED IN ANY FORM OR BY ANY MEANS, ELECTRONIC, MECHANICAL, PHOTOCOPYING, RECORDING OR BY ANY INFORMATION STORAGE SYSTEM WITHOUT THE EXPRESS WRITTEN CONSENT OF TRIBUNAL SYSTEMS INCORPORATED EXCEPT AS FOLLOWS: ALL MATERIAL MAY BE CIRCULATED TO ANY DIOCESE, ARCHDIOCESE, TRIBUNAL APPELLATE TRIBUNAL OR CANONIST OR CANONIST ORGANIZATION OF OR AFFILIATED WITH THE CATHOLIC CHURCH. UNDER NO CIRCUMSTANCE MAY ANY MATERIAL BE CIRCULATED TO ANY COMPETITOR OR POTENTIAL COMPETITOR OF TRIBUNAL SYSTEMS. BY VIEWING/DOWNLOADING ANY OF THIS MATERIAL, YOU AGREE TO THESE TERMS.**

**ALL CASE INFORMATION SHOWN IN ANY PROMOTIONAL MATERIALS IS PURELY FICTIONAL AND WAS CREATED SOLELY FOR THE DEMONSTRATION OF TRIBUNAL SYSTEMS SOFTWARE. ANY RESEMBLANCE TO LIVING OR DECEASED INDIVIDUALS IS PURELY COINCIDENTAL.**

Address inquires to:

Tribunal Systems, Incorporated  
37239 N. 33<sup>rd</sup> Ave  
Desert Hills, AZ 85086  
Web: <http://www.TribunalSystems.com>  
Email: [info@tribunalsystems.com](mailto:info@tribunalsystems.com)

## Table Of Contents

### Chapter 1 – Introduction

Purpose	5
Scope	5
Server Runtime Requirements	6
User Runtime Requirements	6
Benefits	7
Portals	9

### Chapter 2 – Menu System

Purpose	12
Methodology	12
Menu Navigation Example	13
Menu Examples	14

### Chapter 3 – Case Entry

Purpose	18
Petitioner Examples	18
Respondent/Other Party Examples	21
Grounds Example	23
Proposed Marriage Example	25

### Chapter 4 – Queues

Purpose	26
Personal Home Queue Example	26
Notary Manager Queue Example	27
Administrative Case Queue Examples	28
Personnel Caseload Queue Examples	31

### Chapter 5 – Event & Path System

Purpose	34
Methodology	34
Canon Law Adherence	35
Event Timing	35
Event and Path Examples	37

## **Chapter 6 – Record Maintenance**

Purpose	41
Methodology	41
Required Fields	41
Usage Example	42
Record Maintenance Functions	43
Search Function Example	45
Edit Existing Record Example	46
Required Fields Example	47

## **Chapter 7 – Document Rendering System**

Purpose	48
Document Print Link Example	48
Document Spooling Window	49
Activating Print Queue	49
Print Queue	50

## **Chapter 8 – Evidence System**

Purpose	51
Evidence Scanning	51
Evidence Interface Examples	51
Evidence Viewing Example	52

## **Chapter 9 – Export Case Data**

Purpose	54
Case Data Location	54
Decision Definitions	54
Data to Include	56
Exporting Data	57

## **Chapter 10 – User Security Definitions**

Purpose	59
Tribuser Definitions	59

## **Chapter 11 – Canonical Help System**

Purpose	65
Activating Help	65
Main Help Page	66
Search Results Page	67
Help Category Page	68

## **Chapter 1 – Introduction**

### **Purpose**

The Canonical™ Case Management system enables Catholic Diocese to have a definitive structure for the management of Tribunal cases in accordance with Canon Law. Canonical was designed from the ground up by a team of Software Architects, Engineers, Canonists and other Church officials. The end result was Canonical - the most comprehensive product of its kind.

Canonical allows personnel to manage virtually every aspect of the Tribunal Case process – from origination to archiving. Tribunal staff members can easily review the number of cases that are being processed, know the status of each, print documents, attach evidence and fulfill the requirements in order to move them forward. Tribunal Administrators can view personnel caseloads, assign case staff, monitor case progress, produce reports and facilitate more productivity with less cost. Decision makers can do Canon research, archival searches and view evidence from the comfort of their primary locations.

Canonical is easy to use and with the exception of common office software (Microsoft Word and Adobe Acrobat Reader) it requires no extraneous hardware or software on the part of the user. Parishes can submit cases from afar and case personnel can manage their duties while on sabbatical.

By using Canonical, a Diocese is able to ease the workload of staff, ensure case quality and accuracy, manage its personnel, better follow the provisions of Canon Law and save the Diocese thousands of dollars per year or more in processing costs.

### **Scope**

The scope of this document is to ‘discover’ the abilities of the Canonical system and to provide information as to the nature of the system. The information, in general, is meant to purvey knowledge of Canonical without burdening the reader with technical verbiage.

For more detailed information about the Canonical system please ask a Tribunal Systems Representative or visit us online at <http://www.tribunalsystems.com>.

## **Server Runtime Requirements**

The Canonical system is designed to run as an Intranet/Internet, server based application. This allows for the greatest amount of user flexibility (points of contact, distance, requirements) coupled with the greatest amount of cost savings (hardware, software, version control, maintenance).

For best performance and efficiency we would prefer that you use the 'recommended' specifications. Canonical will run using the 'minimum' specifications, however document delivery times, searches, case event movement, number of users and other CPU intensive operations will be impacted.

## **Server Specifications**

<b>Detail</b>	<b>Minimum</b>	<b>Recommended</b>
Number of CPU's	1	2 (500+ cases/yr)
CPU Speed	1 ghz	2.8 ghz+
Memory	1 gb	3 gb
Hard Drive Storage	40 gb	40 gb
Operating System	Win 2000 Server	Win 2003 Server
Bandwidth (internal: LAN/external: DSL)	128 kbs	128 kbs+
Document Management	Office 2000	Office 2003
Document Rendering	Active PDF	Active PDF

## **User Runtime Requirements**

The User Runtime portion of the Canonical system is designed as a 'thin client' Intranet/Internet portal. Although a simple Personal/Desktop or Laptop/Notebook computer will suffice the greater the CPU speed the greater the performance.

For best performance and efficiency we would prefer that you use the 'recommended' specifications.

## **User Specifications**

<b>Detail</b>	<b>Minimum</b>	<b>Recommended</b>
Number of CPU's	1	1
CPU Speed	233 mhz	1.8 ghz +
Memory	128 mb	512 mb
Hard Drive Storage	10 mb Free	10 mb Free
Operating System	Win 98	Win 2000 +
Bandwidth (internal: LAN/external: Web)	56 kbps	128 kbps +
Browser	IE (Latest)	IE (Latest)
Document Rendering	Adobe Acrobat Reader	Adobe Acrobat Reader
Document Viewing	Microsoft Word	Microsoft Word

## **Benefits**

The benefits received from the Canonical system are many:

- **10 Tribunal Case Types**
  - Formal Annulment (includes Documentary and Collegiate)
  - Formal Appellate
  - Appellate by Ratification (Second Instance)
  - Marriage Dispensation/Permission
  - Absence of Canonical Form
  - Pauline Privilege
  - Petrine Privilege
  - Frater-Soror
  - Sanatio
  - Presumed Death
  
- **Canonically Correct Case Processing**

Each case type is crafted to follow Canon Law. As a case progresses from one stage or 'event' to the next the fulfillment information required changes as well. The case information that is required to be gathered or sent out (documents) explicitly follows the steps and procedures as laid down by Canon Law.
  
- **Case Management**

Canonical allows Tribunal administrative staff the ability to view their entire caseload, case status, all assigned personnel and more. Canonical makes users more efficient by showing them their own case loads as well as immediately taking them to the processing event where a particular case may be.
  
- **Document Management**

The Canonical Document Processing Engine has over 700 documents defined. Each document can be tailored to the particular needs of the Tribunal and can be rendered stand-alone or within a case process.
  
- **Evidence Attachment**

Each case processed could require the collection of dozens of pieces of evidence. Each time decision makers need to peruse the evidence of a case, personnel needs to be tasked, files found, documents checked-out, time allotted to receive the documents, etc. Canonical makes this process simple and immediate. The Case Evidence Attachment portal allows the proper personnel to attach, remove and update evidence within, and to, a specific case. Each piece of evidence attached to a case can be called upon and viewed with just one click.

- **Canon Law Research**  
Canonical includes a Canon Law Research portal to help decision makers read through/research the law. The Canons can be updated as needed and are linked directly to Case Grounds. Canon Laws can be searched by keyword and viewed in their entirety.
- **Remote Tribunal Gathering**  
The nature of Canonical is to be network able so it is now possible to serve the Tribunal without leaving the confines of your Parish. Canonical allows for Tribunal members/personnel to work remotely and fulfill their duties remotely. This greatly reduces the cost and scheduling inconsistencies of 'out-of-area' members as well as those that may be on sabbatical or vacation. Tribunals can now conference together, review the same information and include other time commitments as well.
- **Personnel Management**  
Canonical includes a Personnel Management tool that allows Tribunal administrators to view their staff's caseload. Each member's caseload can be scrutinized allowing for discovery of number of cases, status, scheduling and progress.
- **Reporting**  
Canonical has all of the information to produce all of your year-end reports. The Canonical System tracks all of your case activity: Pending, Accepted, Reactivated, Changes, Decisions, Transferred, Judges, Associates, Defenders, etc. Canonical provides an error free way of processing your reporting data.
- **Archiving**  
Canonical can hold every case that your Tribunal has ever done. If you need to find a specific case or do searches based upon Petitioner or Respondent, the Canonical Case Archiving System makes it simple. With Canonical you can see all of the information associated with an archived case so there is no need to search for the 'old' case file.
- **Customization**  
Canonical can be customized to fit your Tribunal's needs. Our engineers can include/exclude stages of a case, allow or disallow certain documents to print/be available, change, revamp, and/or completely disassemble the way in with the cases unfold. Canonical allows us to customize every aspect of the Tribunal process and sub-processes.



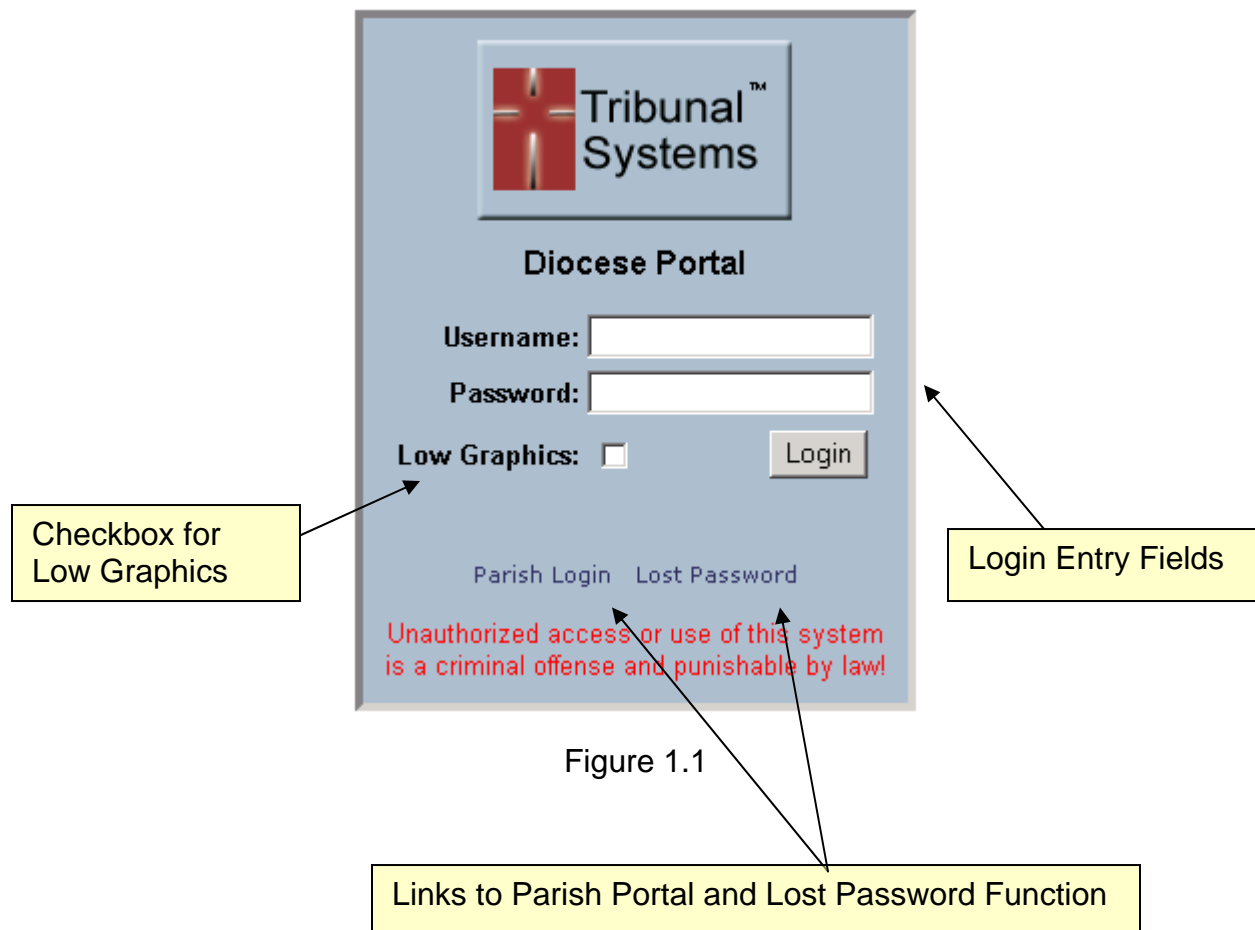
## Portals

The Canonical system comes with three (3) access portals. Each portal is secured via username, password and (if applicable) identifying information. Each portal has a separate identity and purpose.

### **Diocese Portal**

The Diocese Portal (figure 1.1) allows access to the main Diocese/Tribunal functions of the Canonical system. This portal and its functions are designed to be accessed by Tribunal personnel to fulfill their case role duties on a daily basis. All functions required for case and data maintenance can be accessed through this portal.

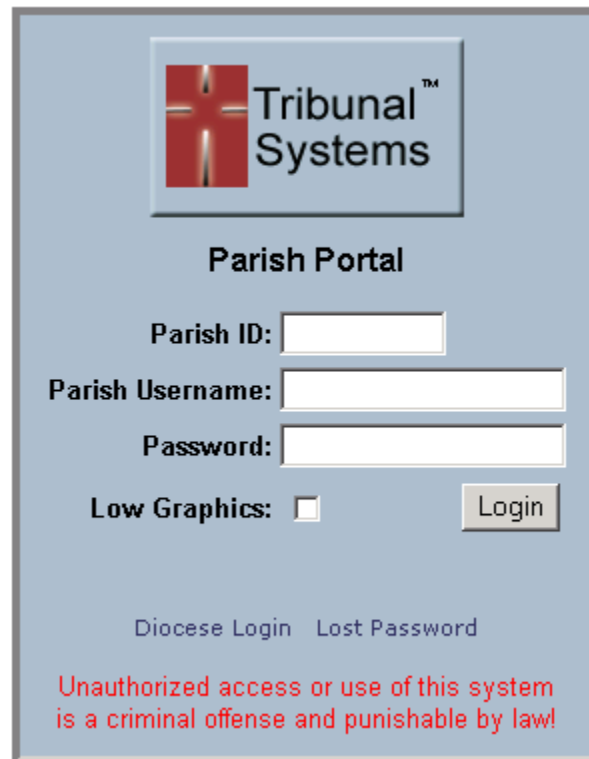
Figure 1.1 illustrates the aspects of the Diocese Portal. The Login Fields are for data entry in order to identify each Tribunal staff member. The Low Graphics Checkbox allows personnel with low bandwidth/dialup connections to view the system with as little system overhead as possible. Hyperlinks to the Parish Login as well as the Lost Password function allow personnel to easily navigate to other locations.



## Parish Portal

The Parish Portal (figure 1.2) has limited uses and only includes those functions necessary for parish personnel to enter cases, view status and print initial documents.

Figure 1.2 illustrates the aspects of the Parish Portal. This portal is similar in design and function as illustrated in figure 1.1.



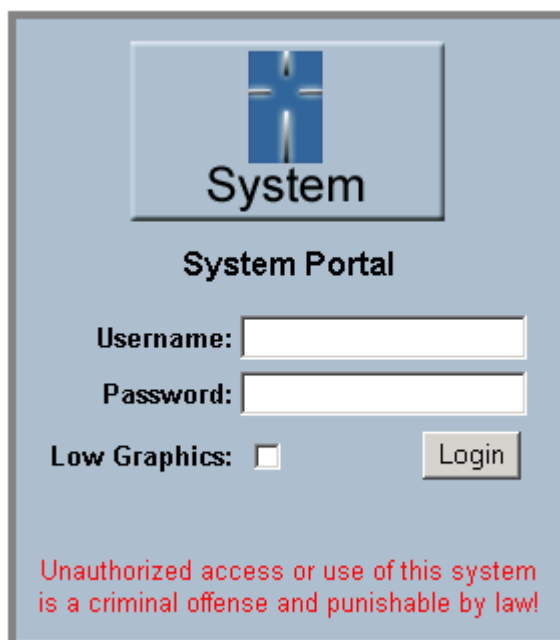
The image shows a screenshot of the Parish Portal login interface. At the top, there is the Tribunal Systems logo, which consists of a red cross icon and the text "Tribunal Systems™". Below the logo, the title "Parish Portal" is centered. The login form includes three input fields: "Parish ID:" with a text box, "Parish Username:" with a text box, and "Password:" with a text box. Below these fields is a "Low Graphics:" checkbox, which is currently unchecked. To the right of the checkbox is a "Login" button. At the bottom of the form, there are two links: "Diocese Login" and "Lost Password". At the very bottom, a red warning message reads: "Unauthorized access or use of this system is a criminal offense and punishable by law!"

Figure 1.2

## System Portal

The System Portal (figure 1.3) allows administrative personnel access to the 'behind-the-scenes' system administrative functions that drive the Canonical system.

Figure 1.3 illustrates the aspects of the System Portal. This portal is similar in design and function as illustrated in figure 1.1.



The screenshot shows a login window with a light blue background. At the top center is a logo consisting of a blue cross-like symbol above the word "System". Below the logo is the title "System Portal". There are two input fields: "Username:" followed by a text box, and "Password:" followed by a text box. Below the password field is a "Low Graphics:" label with an unchecked checkbox. To the right of the checkbox is a "Login" button. At the bottom of the window, there is a red warning message: "Unauthorized access or use of this system is a criminal offense and punishable by law!"

Figure 1.3

## **Chapter 2 – Menu System**

### **Purpose**

Users of the three (3) login portals will arrive at the Canonical Menu System. This system provides access points for Tribunal, Parish and administrative staff members to make selections from a collection of functions to accomplish their assigned tasks.

The functionality or ‘functional access’ of the Menu System rendered can change depending upon the user’s security level, access portal and case role. Functions can be added, changed and/or removed by the administrator as needed and as required by their particular case role.

Any aspect of the Canonical Menu System can be customized to fit the needs and requirements of the Diocese.

### **Methodology**

The Canonical Menu System is a collection of user functions that allow access to certain areas of data or are points of execution for certain commands. All menu functions are grouped by user security code privilege and menu interface type.

As an example: each group within the Diocese Menu System has its own Tribunal case role requirements for fulfilling its caseload duties. This methodology ensures that no unauthorized personnel can access case functions not assigned to them by their case role.

Canonical endeavors to provide the greatest amount of security, with the least amount of maintenance that also allows users to interface with only their given tasks or duties.

**Menu Navigation Example**

Figure 2.1 shows a Diocese Menu System with Administrative Privileges.

Highlighted below are the various areas of the Menu System. Navigation, Caseload, Record Maintenance and group-based functions are located on the left hand side of the screen. Static Menu and User Functions such as: User Code, Case Retrieval, Queue, Home and Logout are located at the top of the screen.

Static Menu/User Functions

Case Type	Current Status	Case Number	Case Name	Queue Days
Frater-Soror	Case Submitted	Pending	Jones/Minton	15
Frater-Soror	Ready to Archive	2003-0109	Buford/Lake	9
Absence of Canonical Form	Case Submitted	Pending	McGregor/Howard*	19
Absence of Canonical Form	Case Submitted	Pending	Olander/Sullivan	19
Absence of Canonical Form	Case Submitted	Pending	Sheldon/Dixon	85
Absence of Canonical Form	Case Submitted	Pending	Ford/Perez	19
Absence of Canonical Form	Accept or Reject	2003-0089	White/Wilson	26
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1996-0431	Phelps/Dixon	12
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0240	Kelley/Olander	34
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0510	Grundie/Wilson	36
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0743	Kerwood/Rabb	19
Absence of Canonical Form	Print Transmission Cover Letter	1997-0271	Buford/Sheldon*	19
Absence of Canonical Form	Print Transmission Cover Letter	2003-0096	Hofmann/Blackwell	26
Absence of Canonical Form	Print Transmission Cover Letter	2003-0097	Bartock/Williams	40
Formal Annulment	Case Submitted	Pending	Phelps/McGregor*	18
Formal Annulment	Case Submitted	Pending	Earnst/Lightle	9
Formal Annulment	Case Submitted	Pending	Howard/Lawson*	11
Formal Annulment	Case Submitted	Pending	Nicholson/Hatch	5
Formal Annulment	Case Submitted	Pending	Eastwood/Piccioli	11

Figure 2.1

Navigation, Caseload and Administrative Functions

## Menu Examples

### Diocese Menu System – Administrative Privileges

Figure 2.2 illustrates the Diocese Menu System with Administrative Privileges.

Please Note: The red circle highlights the difference in available functions between a user with Administrative privileges and a user with Judicial privileges (next page figure 2.3).

Case Type	Current Status	Case Number	Case Name	Queue Days
Frater-Soror	Case Submitted	Pending	Jones/Minton	15
Frater-Soror	Ready to Archive	2003-0109	Buford/Lake	9
Absence of Canonical Form	Case Submitted	Pending	McGregor/Howard*	19
Absence of Canonical Form	Case Submitted	Pending	Olander/Sullivan	19
Absence of Canonical Form	Case Submitted	Pending	Sheldon/Dixon	85
Absence of Canonical Form	Case Submitted	Pending	Ford/Perez	19
Absence of Canonical Form	Accept or Reject	2003-0089	White/Wilson	26
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1996-0431	Phelps/Dixon	12
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0240	Kelley/Olander	34
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0510	Grundie/Wilson	36
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0743	Kerwood/Rabb	19
Absence of Canonical Form	Print Transmission Cover Letter	1997-0271	Buford/Sheldon*	19
Absence of Canonical Form	Print Transmission Cover Letter	2003-0096	Hofmann/Blackwell	26
Absence of Canonical Form	Print Transmission Cover Letter	2003-0097	Bartock/Williams	40
Formal Annulment	Case Submitted	Pending	Phelps/McGregor*	18
Formal Annulment	Case Submitted	Pending	Earnst/Lightle	9
Formal Annulment	Case Submitted	Pending	Howard/Lawson*	11
Formal Annulment	Case Submitted	Pending	Nicholson/Hatch	5
Formal Annulment	Case Submitted	Pending	Eastwood/Piccioli	11

Figure 2.2

Available Functions for the Administrative Group

## Diocese Menu System – Judicial Privileges

Figure 2.3 illustrates the Diocese Menu System with Judicial Privileges.

Please Note: The red circle highlights the difference in available functions between a user with Administrative privileges (previous page figure 2.2) and a user with Judicial privileges.

The screenshot shows the Tribunal Systems interface. The top navigation bar includes the Tribunal Systems logo, Canonical v2.0, a user ID 'testuser10', and buttons for 'Retrieve', 'Help', 'Home', and 'Logout'. Below this is a 'Home Page Queue' section containing a table of cases. On the left sidebar, a red circle highlights the 'Case Maintenance' and 'User Functions' menu items. An arrow points from this circle to a yellow box labeled 'Available Functions for Judicial User'.

Case Type	Current Status	Case Number	Case Name	Queue Days
Formal Appellate	Print Decree of Conclusion	2003-0077	Brown/Gregg	23
Frater-Soror	Case Submitted	Pending	Jones/Minton	15
Frater-Soror	Ready to Archive	2003-0109	Buford/Lake	9
Absence of Canonical Form	Case Submitted	Pending	McGregor/Howard*	19
Absence of Canonical Form	Case Submitted	Pending	Olander/Sullivan	19
Absence of Canonical Form	Case Submitted	Pending	Sheldon/Dixon	85
Absence of Canonical Form	Case Submitted	Pending	Ford/Perez	19
Absence of Canonical Form	Accept or Reject	2003-0089	White/Wilson	26
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1996-0431	Phelps/Dixon	12
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0240	Kelley/Olander	34
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0510	Grundie/Wilson	36
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0743	Kerwood/Rabb	19
Absence of Canonical Form	Print Transmission Cover Letter	1997-0271	Buford/Sheldon*	19
Absence of Canonical Form	Print Transmission Cover Letter	2003-0096	Hofmann/Blackwell	26
Absence of Canonical Form	Print Transmission Cover Letter	2003-0097	Bartock/Williams	40
Formal Annulment	Case Submitted	Pending	Phelps/McGregor*	18
Formal Annulment	Case Submitted	Pending	Earnst/Lightle	9
Formal Annulment	Case Submitted	Pending	Howard/Lawson*	11

Figure 2.3

Available Functions for Judicial User

## Parish Menu System

Figure 2.4 illustrates a typical Parish Menu System. This Menu System provides only the functionality required by Parish users to fulfill their case entry, document print and relationship duties.

Please Note: The red circles highlight the difference in available functions between a Diocese user (figure 2.2) and a Parish user.

No Case Retrieval Functions Available for Parish Users

Case Type	Current Status	Case Number	Case Name	Print Documents
Formal Appellate	Print Evidence Gathering Documents	03/04-0022	Kincade/Hatch*	<a href="#">Print</a>
Formal Appellate	Print Evidence Gathering Documents	2003-0085	Ventner/Richmond*	<a href="#">Print</a>
Formal Appellate	Awaiting Decision from Rome	03/04-0011	Howard/Lawson*	<a href="#">Print</a>
Formal Appellate	Print Ending Documents	03/04-0020	McGregor/Rochelle	<a href="#">Print</a>
Frater-Soror	Case Submitted	Pending	Jones/Minton	<a href="#">Print</a>
Frater-Soror	Ready to Archive	2003-0109	Buford/Lake	<a href="#">Print</a>
Absence of Canonical Form	Case Submitted	Pending	Tucker/Washington	<a href="#">Print</a>
Absence of Canonical Form	Case Submitted	Pending	McGregor/Howard*	<a href="#">Print</a>
Formal Annulment	Case Submitted	Pending	Phelps/McGregor*	<a href="#">Print</a>
Formal Annulment	Case Submitted	Pending	Smith/Rivers	<a href="#">Print</a>
Formal Annulment	Approve Court	2004-0011	Lawson/Wilson*	<a href="#">Print</a>
Formal Annulment	Print Opening Documents	2002-0251	Ventner/Brown	<a href="#">Print</a>
Formal Annulment	Print Opening Documents	2002-0423	Samolitis/Bailey	<a href="#">Print</a>
Formal Annulment	Evidence Gathering	2000-0318	Albert/Welch	<a href="#">Print</a>
Formal Annulment	Collect Briefs/Votums	1998-0282	Williams/Tucker	<a href="#">Print</a>

Figure 2.4

Available Functions for a Typical Parish User



## System Menu System

Figure 2.5 illustrates the System Menu System. The functions located within this Menu System are for the sole purpose of administering back-end processes. This Menu System is to be accessed by trained individuals only and can do damage to Canonical system if not properly managed.

Please Note: The red circles highlight the difference in available functions between a Diocese user (figure 2.2) and a System user.

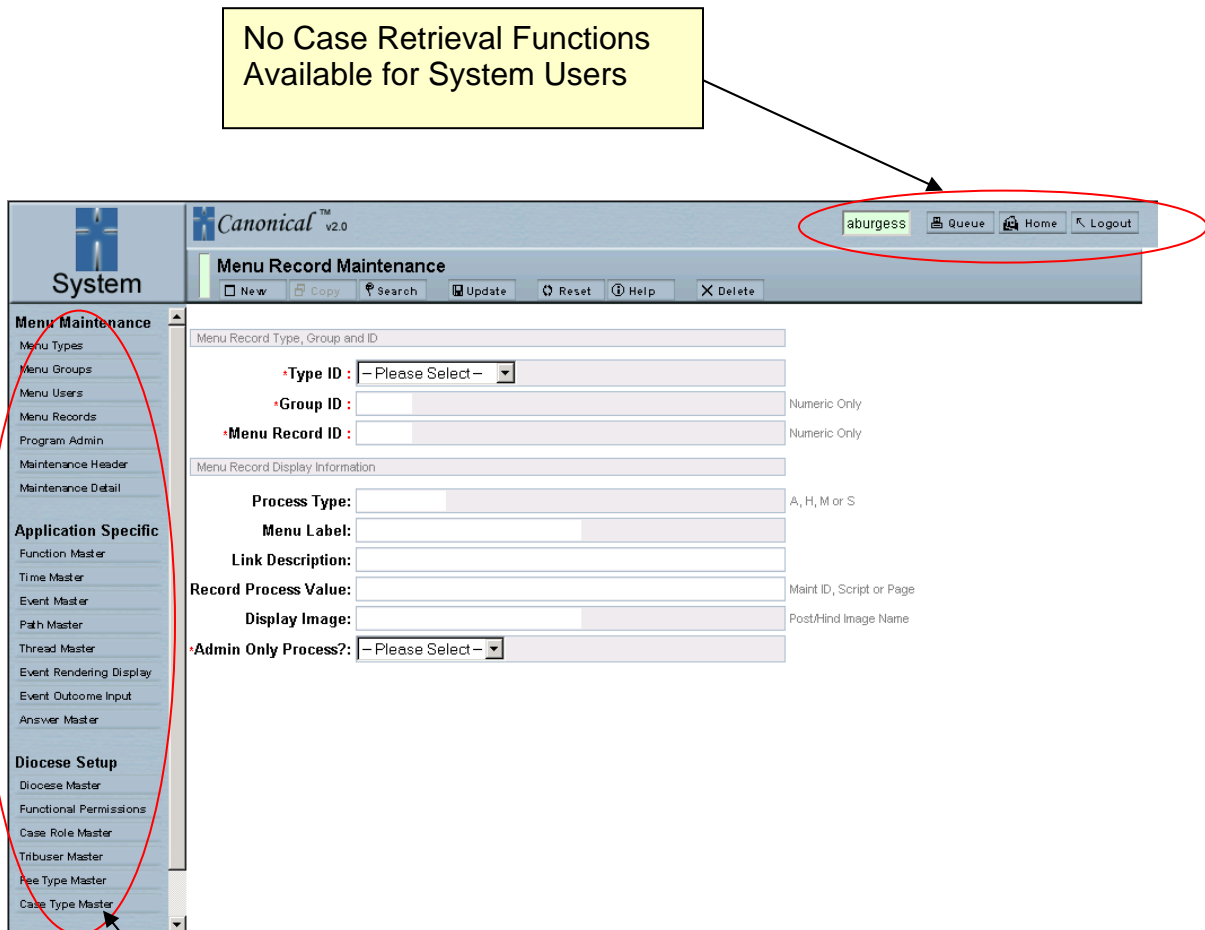


Figure 2.5

## Chapter 3 – Case Entry

### Purpose

The Canonical system allows case entry from the Parish portal as well as the Diocese portal. Case entry at the parish level is limited to one (1) case per parish. Case entry from within the Diocese portal is limited to one (1) case per Tribunal user. By using this methodology Canonical ensures that users fully complete one case entry before moving onto or attempting the next.

Depending on the particular Tribunal configuration, parish case entry may also be limited to certain case types. Canonical automatically saves data entered until the entire case has been complete and submitted.

### Petitioner Examples

#### Petitioner General History

Figure 3.1 illustrates the initial Petitioner General History Case Entry screen. As the data entry process progresses the required information for each case type will change to the attributes of a given circumstance. For example: if a Petitioner has been married three (3) times the Canonical system will ask for three (3) marriage histories.

Figure 3.1

## Petitioner Marriage History

Figure 3.2 illustrates the Petitioner Marriage History Entry screen. During the initial General History entry it was specified that this Petitioner had three (3) previous marriages. The Canonical system will ask for each one of the marriage histories to be completed before moving onto the next section.

The screenshot displays the 'Petitioner Marriage History' entry screen within the Tribunal Systems software. The interface features a sidebar on the left with various navigation options, including 'Case Maintenance', 'Diocese Admin', 'Parish Maintenance', and 'Admin Functions'. The main content area is titled 'Specific Marital History - Petitioner' and contains a form for entering marital history. The form includes the following fields and options:

- This History For:** A dropdown menu set to 'Current Petition'.
- Other Party Prefix:** A dropdown menu set to 'Mr'.
- Other Party First Name:** A text input field containing '1'.
- Other Party Middle Name:** A text input field.
- Other Party Last Name:** A text input field containing '1'.
- Other Party Suffix:** A dropdown menu.
- Other Party Maiden Name:** A text input field.
- Children Born (In Marriage):** A numeric input field set to '0'.
- Children Adopted (In Marriage):** A numeric input field set to '0'.
- Years Lived Together:** A numeric input field set to '0'.
- Military File #:** A text input field.
- Was Other Party to this Marriage, Married Before?:** A dropdown menu set to 'No'.

Figure 3.2

### Petitioner Witness Information

Figure 3.3 illustrates the Petitioner Witness Information Entry screen. Depending on the Tribunal configuration a staff member may or may not have the ability to enter witness information during the initial case entry phase. This example automatically provides space for two (2) witnesses.

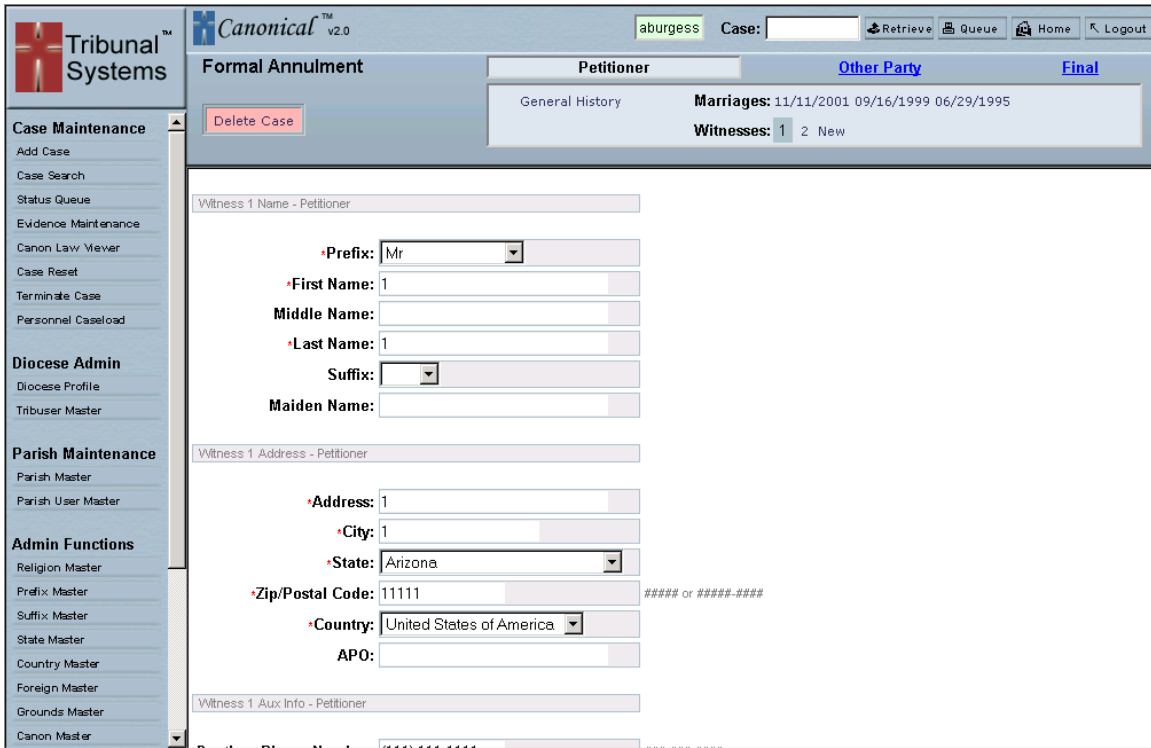


Figure 3.3

Figure 3.4 enhances the Case Entry toolbar to allow you to see the various components in detail.

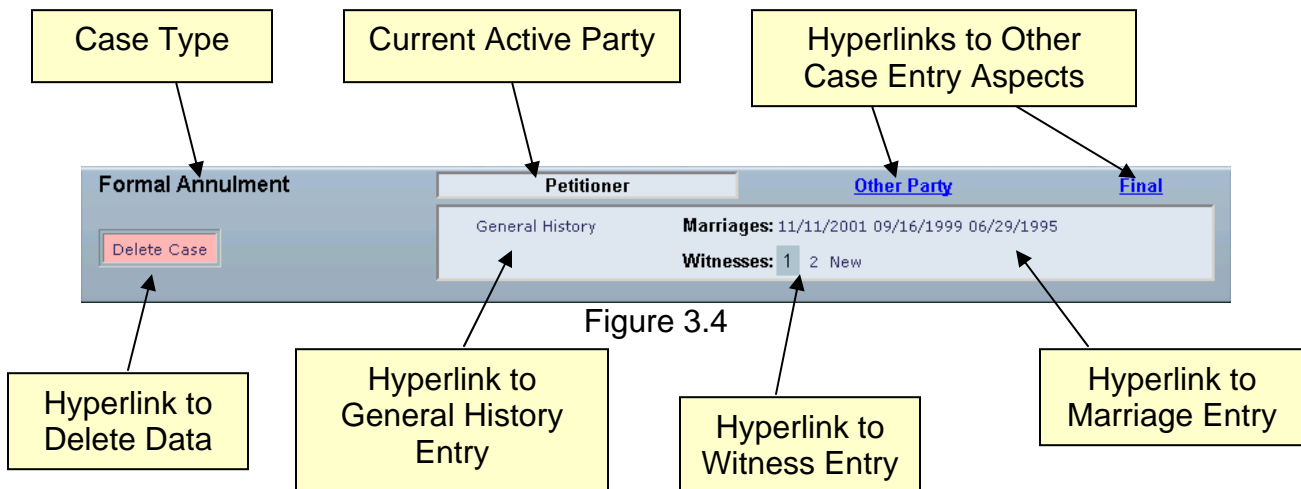


Figure 3.4

## Respondent/Other Party Examples

### Respondent/Other Party General History

Figure 3.5 illustrates the initial Respondent/Other Party Case Entry screen. As the data entry process progresses the required information for each case type will change to the attributes of a given circumstance. For example: if a Petitioner has been married three (3) times the Canonical system will ask for three (3) marriage histories.

Please Note: The Respondent/Other Party interface does not allow for witness entry.

The screenshot displays the 'Formal Annulment' case entry screen. The top navigation bar includes the Tribunal Systems logo, 'Canonical v2.0', the user 'aburgess', and a 'Case:' field. Below this, there are tabs for 'Petitioner' and 'Other Party', with 'Final' also visible. A 'Delete Case' button is present. The main content area is titled 'General Party History - Other Party' and contains the following form fields:

- If Form is For Prenuptial Inquiry I am the:** (Dropdown menu)
- Prefix:** Mr (Dropdown menu)
- First Name:** 1 (Text field)
- Middle Name:** (Text field)
- Last Name:** 1 (Text field)
- Suffix:** (Dropdown menu)
- Maiden Name:** (Text field)
- Other Party Address:** (Text field)
- Address:** 1 (Text field)
- City:** 1 (Text field)
- State:** Arizona (Dropdown menu)
- Zip/Postal Code:** 1 (Text field) with a note: '#### or ####-####'
- Country:** United States of America (Dropdown menu)
- APO:** (Text field)

Figure 3.5

## Respondent/Other Party Marriage History

Figure 3.6 illustrates the Respondent/Other Party Marriage History Entry screen. During the initial General History entry it was specified that this Respondent/Other Party had one (1) previous marriage. The Canonical system will ask for that data to be provided before moving onto the next section.

The screenshot shows the Tribunal Systems software interface. The top header includes the Tribunal Systems logo, Canonical v2.0, and user information (aburgess). The case details section shows 'Formal Annulment' with tabs for 'Petitioner', 'Other Party', and 'Final'. A 'Delete Case' button is visible. The main form area is titled 'Specific Marital History - Other Party' and contains the following fields:

- \*This History For: Current Petition (dropdown)
- \*Petitioner or Prior Spouse Prefix: Mr (dropdown)
- \*Petitioner or Prior Spouse First Name: Jack
- \*Petitioner or Prior Spouse Middle Name: (empty)
- \*Petitioner or Prior Spouse Last Name: Smith
- Suffix: (dropdown)
- \*Petitioner or Prior Spouse Maiden Name: (empty)
- \*Children Born (In Marriage): 0 (Numeric Only)
- \*Children Adopted (In Marriage): 0 (Numeric Only)
- \*Years Lived Together: 0 (Numeric Only)
- Military File #: (empty)

Figure 3.6

**Grounds Example**

Figure 3.7 and enhanced figure 3.8 (on the next page) illustrate the Grounds Entry display. This screen allows for the entry of data associated with Advocates, Petitioner and Respondent Grounds, Competency, Libellus Summary and Case Fees.

Figure 3.7

Enhanced in Figure 3.8  
 on the Next Page

**Petitioner Can Request a Local Advocate or Advocate from another Area**

Procurator/Advocate Mandate - Petitioner

Choose Current Court Advocate or Enter Petitioner's Choice Advocate Below. Advocate will be Assigned by Court if Selections are Blank or Non-Descript!

Court Advocate:

- OR -

Petitioner's Choice Advocate Name:

Advocate Full Address:  Street, City, State, Zip, Country

Advocate Phone:  ###-###-####

Declaration of Nullity on Canonical Grounds

\*Petitioner Grounds:  No Grounds

\*Other Party Grounds:  No Grounds

Hear Formal Case Petition based On Competency

\*Competency of:  Place of contract. Canon 1673, 1\*

Figure 3.8

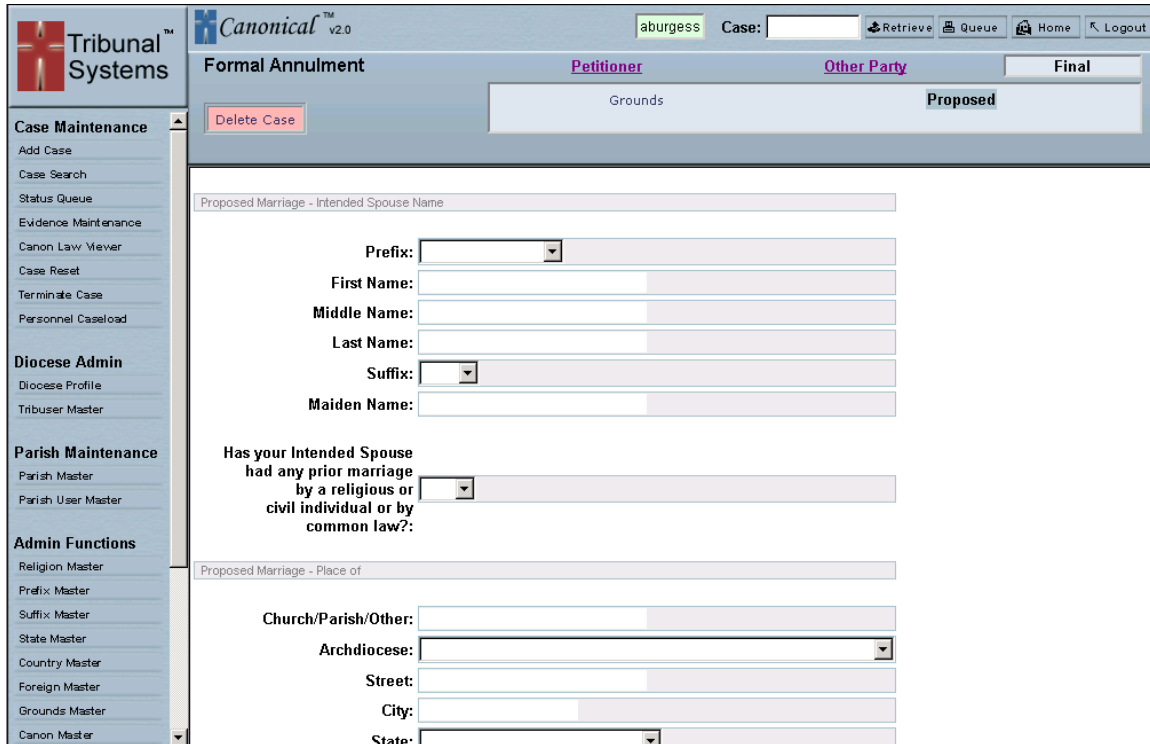
Grounds Can Be Entered for Both Parties

Competency Can Be Entered



## Proposed Marriage Example

Figure 3.9 illustrates the Proposed Marriage Entry display. This screen would be required for a Marriage Dispensation/Permission case type but it is also intended to gather information on a general basis.



The screenshot shows the Tribunal Systems interface for a 'Formal Annulment' case. The user 'aburgess' is logged in. The case is currently in the 'Proposed' stage. The main form area is titled 'Proposed Marriage - Intended Spouse Name' and contains the following fields:

- Prefix:
- First Name:
- Middle Name:
- Last Name:
- Suffix:
- Maiden Name:
- Has your Intended Spouse had any prior marriage by a religious or civil individual or by common law?:

Below this, the form is titled 'Proposed Marriage - Place of' and contains the following fields:

- Church/Parish/Other:
- Archdiocese:
- Street:
- City:
- State:

Figure 3.9

## Chapter 4 – Queues

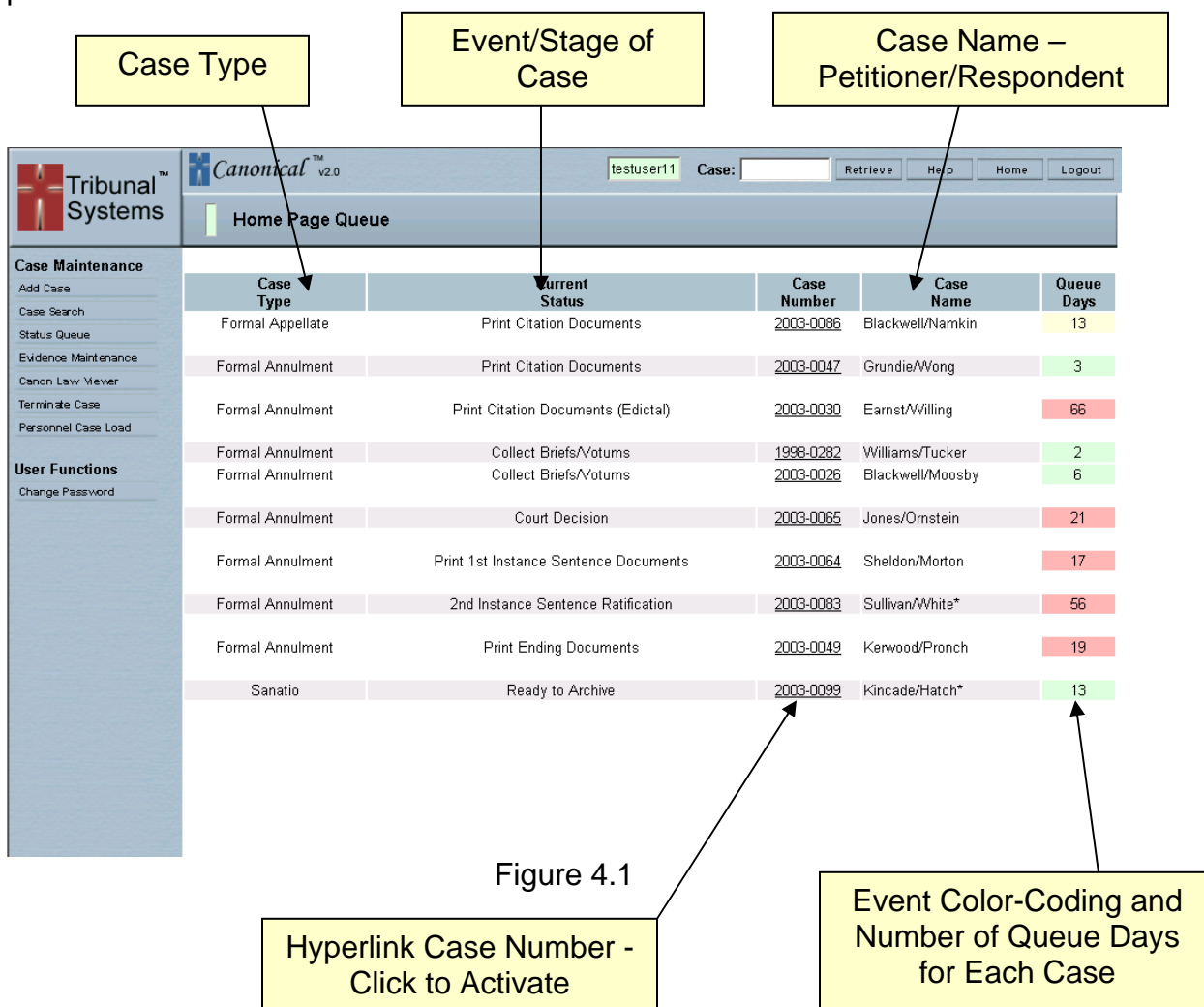
### Purpose

The Canonical system organizes work and process flow into ‘queues’. These queues allow different aspects of the Canonical system to be seen and acted upon by Tribunal personnel.

Queues can take the form of personnel caseloads, event processes and cases requiring information. Where appropriate, each queue displays the pertinent information about the process or function with hyperlinks to the specified location. This methodology allows for ‘one click’ navigation through the Canonical system.

### Personal Home Queue Example

Figure 4.1 illustrates a typical Tribunal staff member queue. The Home Queues are designed to be an employee’s checklist of their Tribunal caseload. Each case they are associated with (in any capacity) is displayed in their Home Queue. This enables Tribunal staff members to visually inspect each case, its status and performance.



## Notary Manager Queue Example

Figure 4.2 illustrates a Tribunal Notary Manager Queue. This queue is identical to the queue displayed in figure 4.1 (previous page), however, Notary Managers have the added ability to assign/distribute new case to Notary personnel. This function manifests itself by adding a hyperlink to the Case Name field. When a new case arrives in the Notary Manager Queue the staff member simply clicks the link and assigns an appropriate Notary.

Case Type	Current Status	Case Number	Case Name	Queue Days
Frater-Soror	Ready to Archive	<a href="#">2003-0109</a>	Buford/Lake	12
Absence of Canonical Form	Case Submitted	<a href="#">Pending</a>	McGregor/Howard	22
Absence of Canonical Form	Case Submitted	<a href="#">Pending</a>	Olander/Sullivan	22
Absence of Canonical Form	Case Submitted	<a href="#">Pending</a>	Sheldon/Dixon	88
Absence of Canonical Form	Case Submitted	<a href="#">Pending</a>	Ford/Perez	22
Absence of Canonical Form	Accept or Reject	<a href="#">2003-0089</a>	White/Wilson	29
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	<a href="#">1996-0431</a>	Phelps/Dixon	15
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	<a href="#">1997-0240</a>	Kelley/Olander	37
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	<a href="#">1997-0510</a>	Grundie/Wilson	39
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	<a href="#">1997-0743</a>	Kerwood/Rabb	22
Absence of Canonical Form	Print Transmission Cover Letter	<a href="#">1997-0271</a>	Buford/Sheldon*	22
Absence of Canonical Form	Print Transmission Cover Letter	<a href="#">2003-0096</a>	Hofmann/Blackwell	29
Absence of Canonical Form	Print Transmission Cover Letter	<a href="#">2003-0097</a>	Bartock/Williams	43
Formal Annulment	Case Submitted	<a href="#">Pending</a>	Phelps/McGregor*	21
Formal Annulment	Case Submitted	<a href="#">Pending</a>	Howard/Lawson*	14
Formal Annulment	Case Submitted	<a href="#">Pending</a>	Nicholson/Hatch	8
Formal Annulment	Case Submitted	<a href="#">Pending</a>	Eastwood/Piccioli	14
Formal Annulment	Recommend Court	<a href="#">Pending</a>	Earust/Lightle	1

Figure 4.2

Hyperlinked Case Names (of new cases)  
 Activate Functions to Assign Notary

## Administrative Case Queue Examples

Figures 4.3 through 4.5 illustrate the Administrative Case Queues. These queues allow Tribunal administrators to view the entire Tribunal caseload as well as the general status of each case.

Figure 4.3 allows administrative personnel to view the total number of cases for any given case type. Administrators can move to each specific Case Type Queue by clicking on the Case Type name.

Case Types	Number Of Cases
<a href="#">Formal Appellate</a>	18
<a href="#">Frater-Soror</a>	5
<a href="#">Absence of Canonical Form</a>	14
<a href="#">Formal Annulment</a>	40
<a href="#">Marriage Dispensation/Permission</a>	9
<a href="#">Presumed Death</a>	2
<a href="#">Appellate by Ratification</a>	7
<a href="#">Sanatio</a>	3
<a href="#">Petrine Privilege</a>	7
<a href="#">Pauline Privilege</a>	6
<b>Total:</b>	<b>111</b>

Figure 4.3

Hyperlink Case Type – Allows Users to Move to Specific Case Type Queue (figure 4.4)

Total Number of Cases for Each Case Type

Figure 4.4 illustrates the Formal Annulment Case Type Specific Queue. This queue shows the entire Formal Annulment caseload for the Tribunal. Cases shown in this queue are displayed in groups by their Status/Event. Each Status/Event is a hyperlink with takes you directly to a more granular queue.

Current Status	Case Number	Case Name	Last Accessed	Queue Days
<a href="#">Case Submitted</a>	Pending	Phelps/McGregor*	09/02/2003	21
<a href="#">Case Submitted</a>	Pending	Smith/Rivers	09/30/2003	1
<a href="#">Case Submitted</a>	Pending	Howard/Lawson*	09/11/2003	14
<a href="#">Case Submitted</a>	Pending	Nicholson/Hatch	09/21/2003	8
<a href="#">Case Submitted</a>	Pending	Eastwood/Piccioli	09/11/2003	14
<a href="#">Recommend Court</a>	Pending	Earnst/Lightle	09/30/2003	1
<a href="#">Approve Court</a>	1995-0068	Poplar/Mcnamara	09/05/2003	18
<a href="#">Approve Court</a>	2003-0166	Rico/Lawson	09/05/2003	18
<a href="#">Approve Court</a>	2004-0011	Lawson/Wilson*	06/18/2003	75
<a href="#">Print Opening Documents</a>	2002-0423	Samolitis/Bailey	08/13/2003	35
<a href="#">Print Opening Documents</a>	2003-0068	Carter/Albert	09/09/2003	16
<a href="#">Print Citation Documents</a>	2002-0251	Ventner/Brown	09/30/2003	1
<a href="#">Print Citation Documents</a>	2003-0047	Grundie/Wong	09/27/2003	3
<a href="#">Print Citation Documents</a>	2003-0067	Ferrier/Smith	09/13/2003	13
<a href="#">Print Citation Documents</a>	2003-0071	Smith/Welch	09/14/2003	13
<a href="#">Print Citation Documents (Edictal)</a>	2003-0030	Earnst/Willing	07/01/2003	66
<a href="#">Awaiting Citation Responses</a>	1994-0314	Wayne/Earnst*	09/30/2003	18
<a href="#">Awaiting Citation Responses</a>	2002-0654	Plank/Sullivan	09/01/2003	22
<a href="#">Awaiting Citation Responses</a>	2002-0700	Larson/Anderson	08/13/2003	35

Figure 4.4

Hyperlink Case Status/Event – Allows Users to Move to Specific Event Queues (figure 4.5)

Figure 4.5 illustrates the Formal Annulment Case Submitted Queue. This queue displays all of the cases that currently have the status of Case Submitted. The cases are sorted by queue days with the oldest cases first. This allows administrators to see which cases need the most attention.



Case Number	Case Name	Last Accessed	Queue Days
Pending	Phelps/McGregor*	09/02/2003	21
Pending	Eastwood/Piccioli	09/11/2003	14
Pending	Howard/Lawson*	09/11/2003	14
Pending	Nicholson/Hatch	09/21/2003	8
Pending	Smith/Rivers	09/30/2003	1
<b>Total: 5</b>			

Figure 4.5

## Personnel Caseload Queue Examples

The previous examples displayed queues as being used for determining Case Type caseloads and case statuses. Figures 4.6 through 4.8 illustrate Personnel queues that assist Tribunal administrators in determining how caseloads are distributed among their staff members.

Figure 4.6 illustrates the overall Tribunal caseload sorted by staff member. Each Tribunal staff member's user code is hyperlinked so that administrative personnel can easily navigate to view each caseload in more detail. The total number of cases for each Tribunal staff member is listed on the right hand side of the screen.

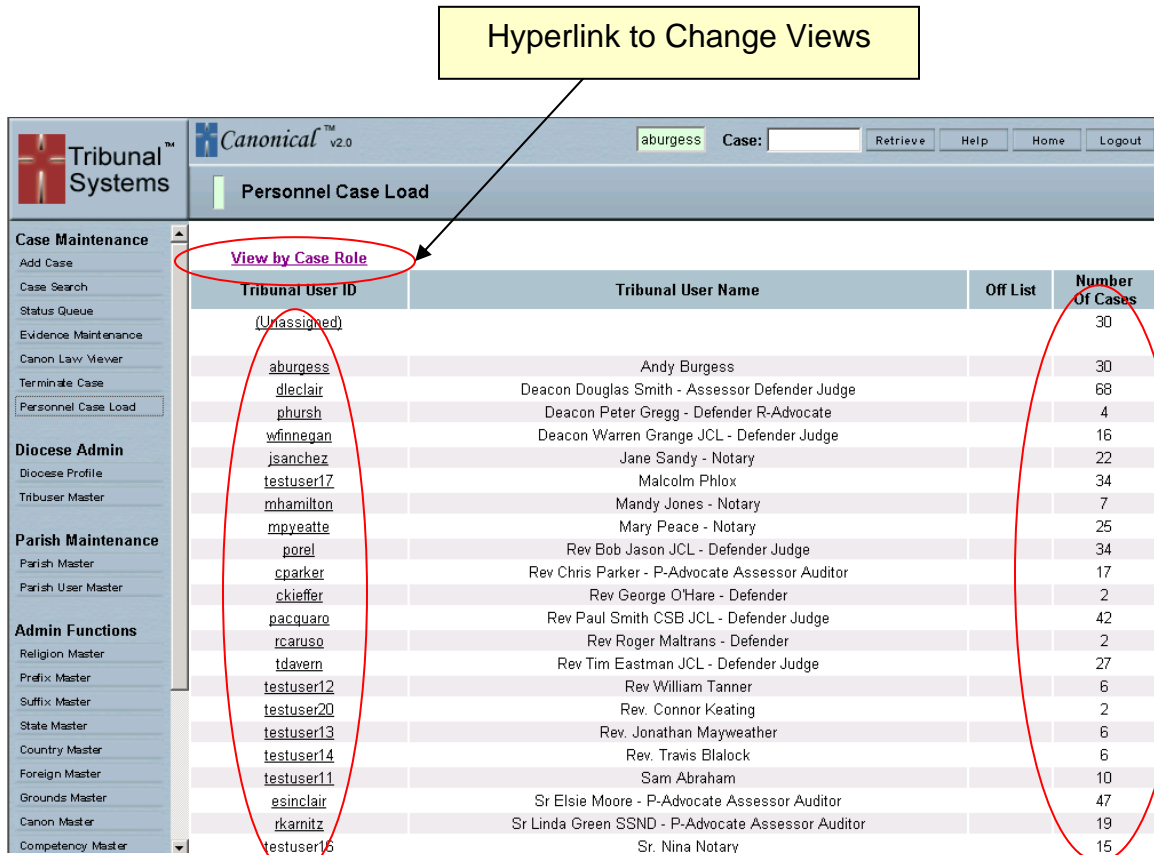


Figure 4.6

**Hyperlink User Code – Allows Administrators to View User's Entire Caseload**

**Total Number of Case for Each User**

Figure 4.7 illustrates an administrative view of a Tribunal staff member's caseload. This queue displays each assigned case as well as the User Case Role and case status.

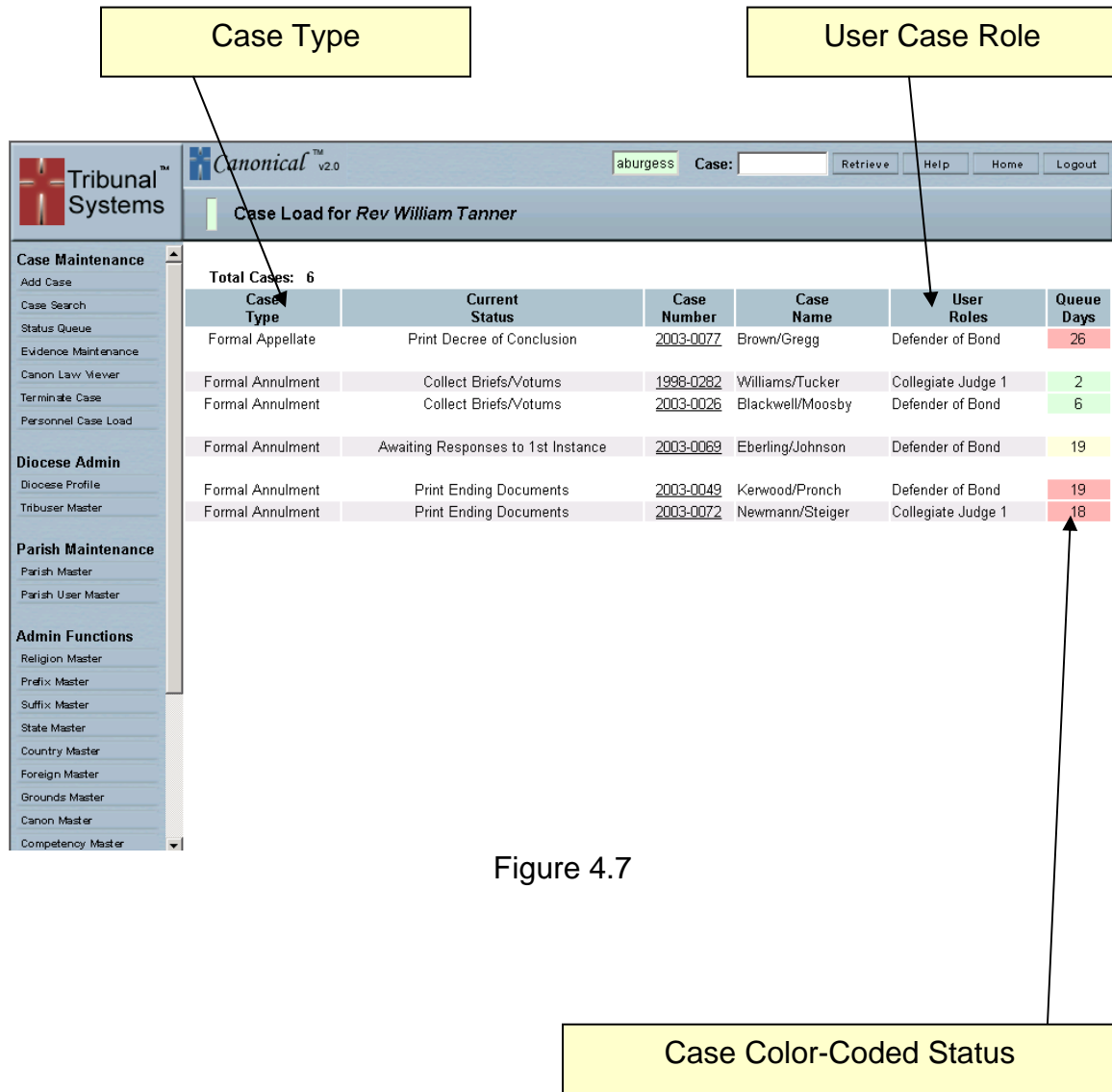


Figure 4.7



Figure 4.8 illustrates an administrative view of the Personnel Caseload Queue as sorted into User Case Role groups. This display allows administrators to view Tribunal staff members as assigned by their Case Role.

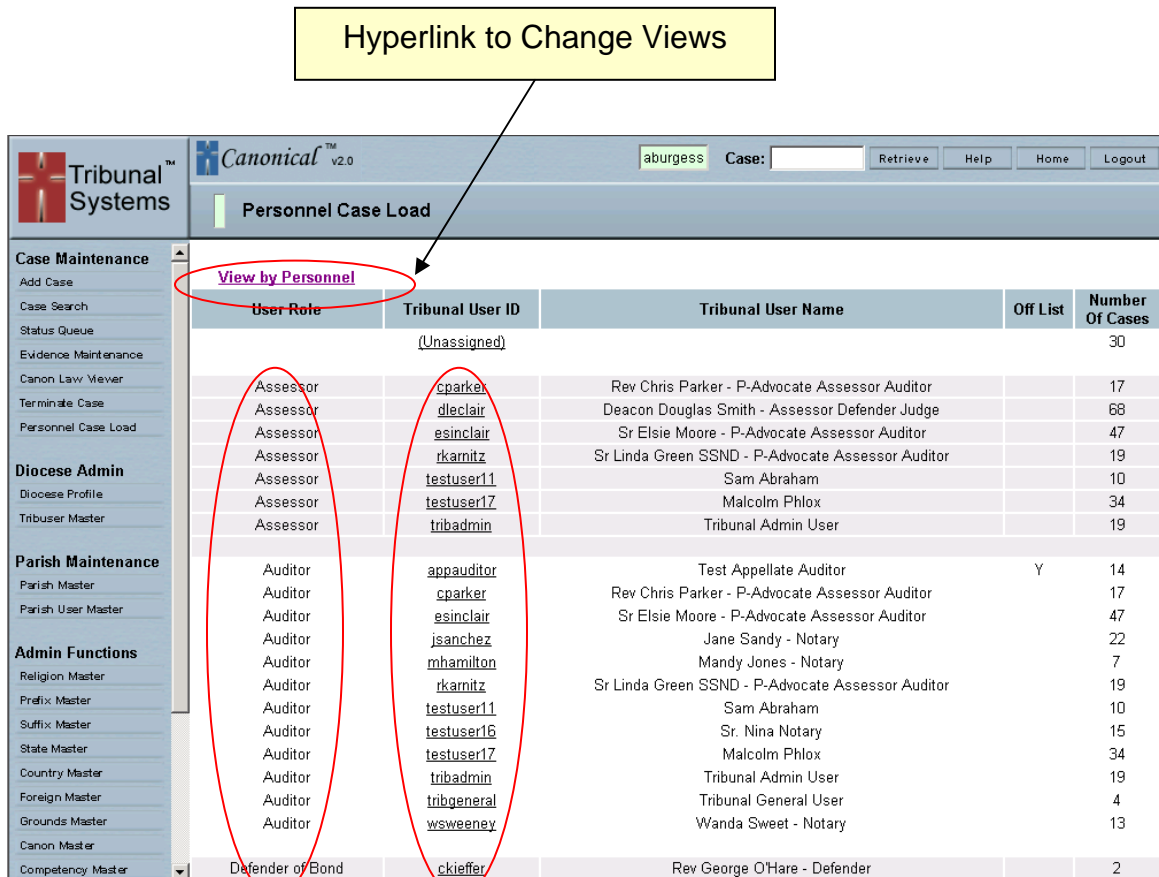


Figure 4.8

## Chapter 5 – Event & Path System

### Purpose

The Canonical system utilizes a proprietary approach of ‘events’ that are organized into ‘paths’ to process Tribunal cases according to Canon law. This process forms the backbone of the Canonical software platform. The Event and Path System allows Tribunal staff members to access a case at the exact moment in time it has reached through the Canon law process. This significantly reduces the time and energy spent on finding Tribunal cases and assessing their status. Personnel can navigate to a case and immediately respond to the system. Staff members can enter data, print documents and any function required in order to move a case forward through the process. Personnel are kept ‘on track’ throughout the entire life of a case and always stay within the legal guidelines as prescribed by Canon law.

### Methodology

The Canonical system breaks each Tribunal case type down into a series of stages or events. These events are then arranged into paths that follow Canon law. As each event ‘outcome’ is decided a case will flow down that path consistent with the results it has experienced.

An event/path example can be seen with the following Formal Annulment case type diagram (figure 5.1):

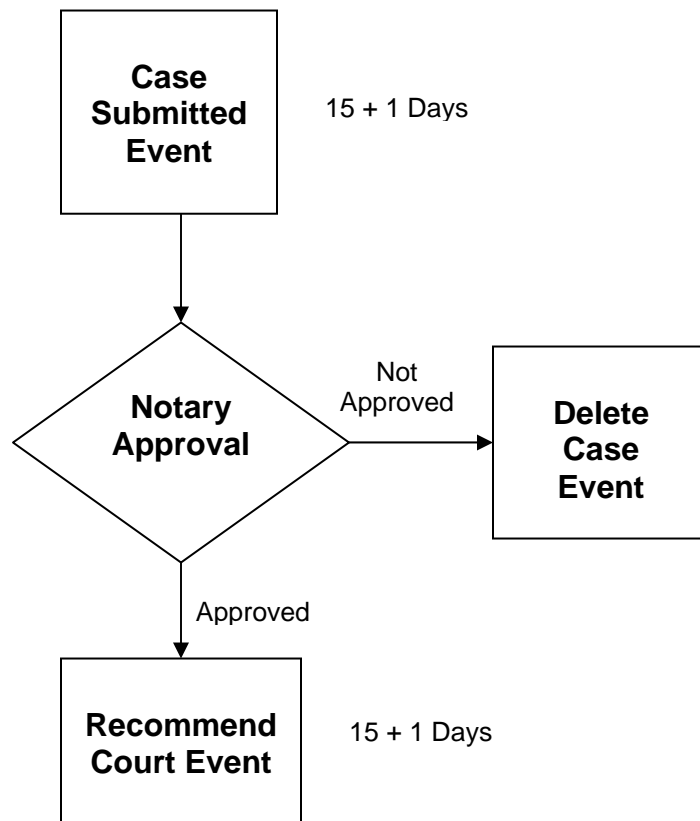


Figure 5.1

By following the steps in figure 5.1 (previous page) we see that the first event is 'Case Submission'. During this event the Notary of the case will ascertain the quality and quantity of the data submitted by the Parish to the Tribunal. If the data for the case submitted is 'Not Approved', the case is moved into the 'Delete Case' event. However, if the case is 'Approved' it is moved onto the next event in the case process: 'Recommend Court'.

Together, the separate and specific events form a path. As you can see in figure 5.1 (previous page) each event has a specific purpose and goal. Depending on the outcome of any given event the case is moved, down the appropriate path as dictated by Canon law.

This Event Processing methodology is used throughout the Canonical system.

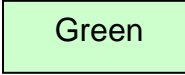
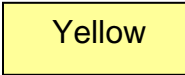
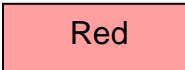
**Canon Law Adherence**

By using the proprietary Canonical Event Processing system Tribunal cases can unfold as prescribed by Canon law.

**Event Timing**

According to Canon law each event is given a certain amount of time (in days) to be completed. As you can see in figure 5.1 (previous page) the Case Submitted event is given 15 + 1 days to be completed. By using the Canonical Event Processing system each event within a given path can be given the correct amount of time to be processed.

Event Timing can also be used as an indicator as to the status of each Tribunal case and as a personnel productivity gauge. Canonical color-codes the amount of time each case has spent at any given event (figure 5.2). This allows for an immediate view as to case status. Canonical uses the following calculations for applying the event color-coding:

<b>Event Time Allotment Percent</b>	<b>Color</b>
0 – 69%	 Green
70 – 100%	 Yellow
100% +	 Red

Please Note: Canonical does not 'force' termination for cases that reach their maximum time allotments. Canonical only displays the number of days and color-codes each case. The policies, procedures and dispositions related to overdue cases are at the sole discretion of the processing Tribunal.

Case Type	Current Status	Case Number	Case Name	Queue Days
Frater-Soror	Case Submitted	Pending	Jones/Minton	16
Frater-Soror	Ready to Archive	2003-0109	Buford/Lake	10
Absence of Canonical Form	Case Submitted	Pending	McGregor/Howard*	20
Absence of Canonical Form	Case Submitted	Pending	Olander/Sullivan	20
Absence of Canonical Form	Case Submitted	Pending	Sheldon/Dixon	86
Absence of Canonical Form	Case Submitted	Pending	Ford/Perez	20
Absence of Canonical Form	Accept or Reject	2003-0089	White/Wilson	27
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1996-0431	Phelps/Dixon	13
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0240	Kelley/Olander	35
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0510	Grundie/Wilson	37
Absence of Canonical Form	Print Decree Declaring No Ecclesiastical Bond	1997-0743	Kerwood/Rabb	20
Absence of Canonical Form	Print Transmission Cover Letter	1997-0271	Buford/Sheldon*	20
Absence of Canonical Form	Print Transmission Cover Letter	2003-0096	Hofmann/Blackwell	27
Absence of Canonical Form	Print Transmission Cover Letter	2003-0097	Bartock/Williams	41
Formal Annulment	Case Submitted	Pending	Phelps/McGregor*	19
Formal Annulment	Case Submitted	Pending	Earnst/Lightle	10
Formal Annulment	Case Submitted	Pending	Howard/Lawson*	12
Formal Annulment	Case Submitted	Pending	Nicholson/Hatch	6
Formal Annulment	Case Submitted	Pending	Eastwood/Piccioli	12

Figure 5.2

Event Color-Coding and Number of Queue Days for Each Case

## Event and Path Examples

Figures 5.3 through 5.8 illustrate a Formal Annulment Case being moved from the Case Submitted Event to the Recommend Court Event.

### Formal Annulment Queue

Figure 5.3 and 5.4 show the case Howard/Lawson at the Case Submitted event in the Formal Annulment Queue. This case has been at the Case Submitted event for 0 days (new case) and is color-coded green. To activate/view a case the user would simply click on the case number.

Current Status	Case Number	Case Name	Last Accessed	Queue Days
Case Submitted	Pending	Smith/Rivers	09/30/2003	0
Case Submitted	Pending	Russell/Smythe	09/30/2003	0
Case Submitted	Pending	Burgess/Brown*	09/30/2003	0
Case Submitted	Pending	Howard/Lawson*	09/30/2003	0
Recommend Court	Pending	Earnst/Lightle	09/30/2003	0
Recommend Court	Pending	Nicholson/Hatch	09/30/2003	0
Approve Court	1995-0068	Poplar/Mcnamara	09/05/2003	17
Print Opening Documents	2003-0068	Carter/Albert	09/09/2003	15
Print Opening Documents	2004-0011	Lawson/Wilson*	09/30/2003	0
Judicial Outcome	2002-0423	Samolitis/Bailey	09/30/2003	0
Judicial Outcome	2003-0166	Rico/Lawson	09/30/2003	0
Print Citation Documents	2002-0251	Ventner/Brown	09/30/2003	0
Print Citation Documents	2003-0047	Grundie/Wong	09/27/2003	2
Print Citation Documents	2003-0067	Ferrier/Smith	09/13/2003	12
Print Citation Documents	2003-0112	Eastwood/Piccioli	09/30/2003	0
Awaiting Citation Responses	1994-0314	Wayne/Earnst*	09/30/2003	17
Awaiting Citation Responses	2002-0654	Plank/Saunders	09/30/2003	21
Awaiting Citation Responses	2002-0700	Larson/Anderson	08/13/2003	34
Awaiting Citation Responses	2003-0071	Smith/Welch	09/30/2003	0

Figure 5.3

Current Status	Case Number	Case Name	Last Accessed	Queue Days
Case Submitted	Pending	Smith/Rivers	09/30/2003	0
Case Submitted	Pending	Russell/Smythe	09/30/2003	0
Case Submitted	Pending	Burgess/Brown*	09/30/2003	0
Case Submitted	Pending	Howard/Lawson*	09/30/2003	0

Figure 5.4

Hyperlink Case Number

Howard/Lawson Case to be Moved

## Case Submitted Event – Case Event Interface

Figure 5.5 shows the Howard/Lawson case as it appears, after it has been activated, in the Event Interface. Located at the top of the display is the case event 'data tab' section (enhanced in figure 5.6). Displayed in the center of the screen are the 'case event procedures and movement' options (enhanced in figure 5.7).

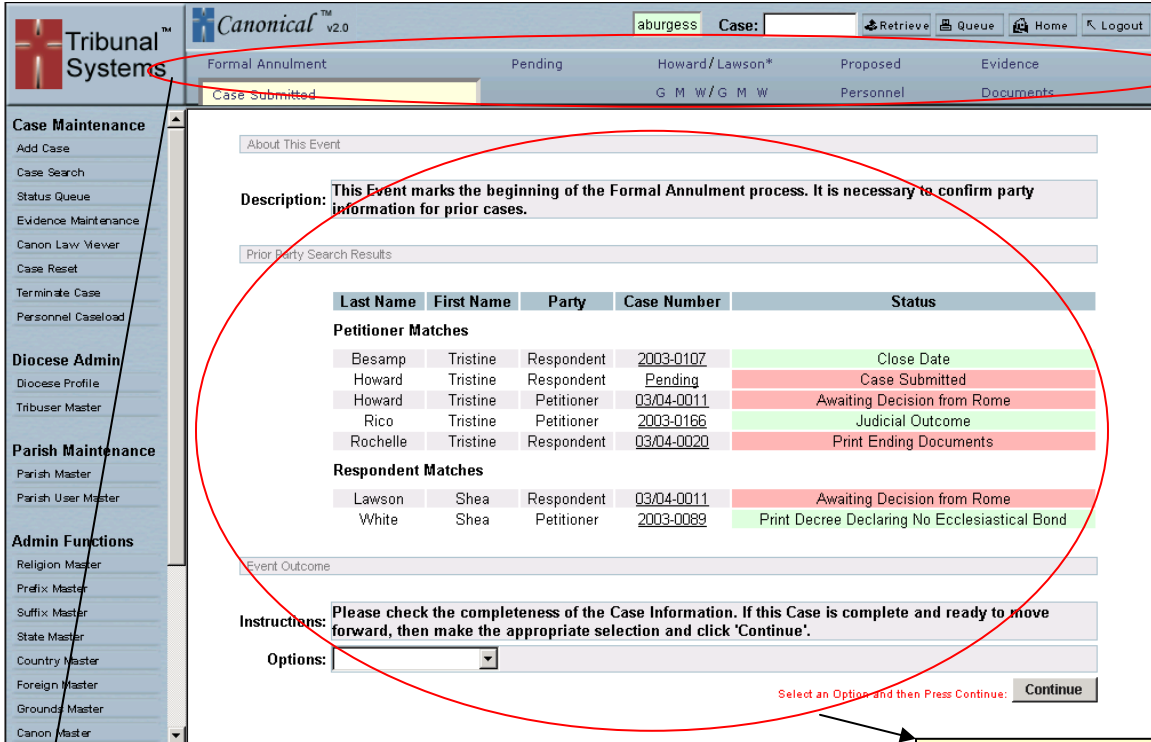


Figure 5.5

Please See Figure 5.7 on the Following Page

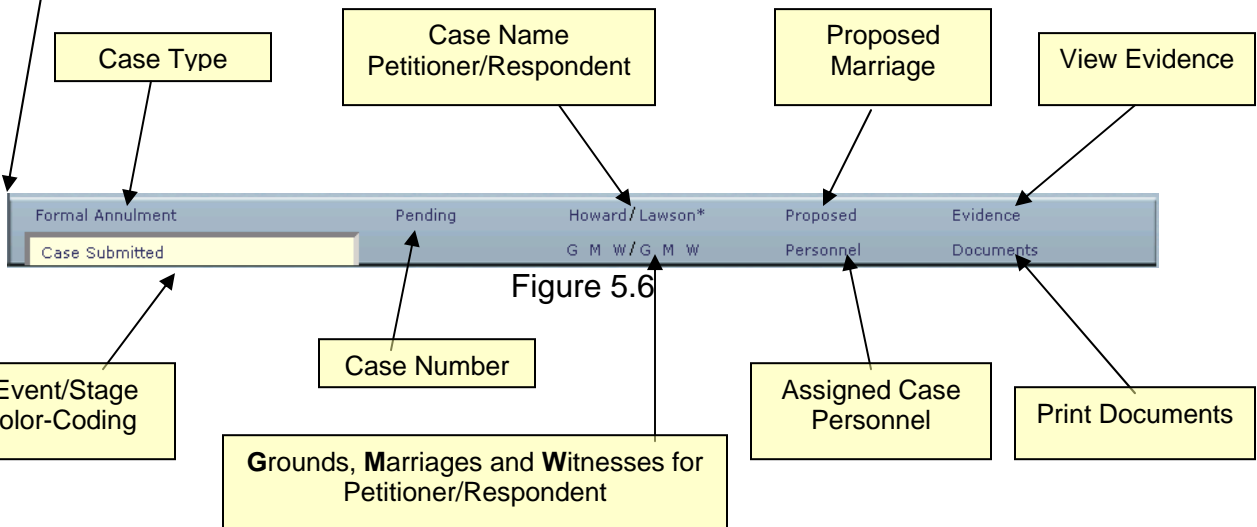


Figure 5.6

## Case Submitted Event – Case Event Procedures and Movement

The Case Event Procedures and Movement options notify the Tribunal staff member as to the actions required to complete that particular event and move the case forward. This portion of the interface will change from event to event depending on the criteria for case movement.

Displayed in figure 5.7 is the Petitioner and Respondent search results required for historical analysis before a case is accepted. Also displayed are Instructions or Reminders to check for the completeness of case data before moving it further on in the process.

Once the Tribunal staff member has completed their research and ensured the completeness of the data has been met, he/she will move the case forward to the 'Recommend Court' event.

**About This Event**

**Description:** This Event marks the beginning of the Formal Annulment process. It is necessary to confirm party information for prior cases.

**Prior Party Search Results**

Last Name	First Name	Party	Case Number	Status
<b>Petitioner Matches</b>				
Besamp	Tristine	Respondent	<a href="#">2003-0107</a>	Close Date
Howard	Tristine	Respondent	<a href="#">Pending</a>	Case Submitted
Howard	Tristine	Petitioner	<a href="#">03/04-0011</a>	Awaiting Decision from Rome
Rico	Tristine	Petitioner	<a href="#">2003-0166</a>	Judicial Outcome
Rochelle	Tristine	Respondent	<a href="#">03/04-0020</a>	Print Ending Documents
<b>Respondent Matches</b>				
Lawson	Shea	Respondent	<a href="#">03/04-0011</a>	Awaiting Decision from Rome
White	Shea	Petitioner	<a href="#">2003-0089</a>	Print Decree Declaring No Ecclesiastical Bond

**Event Outcome**

**Instructions:** Please check the completeness of the Case Information. If this Case is complete and ready to move forward, then make the appropriate selection and click 'Continue'.

**Options:**

Select an Option and then Press Continue:

**Figure 5.7**

**Case Option/Movement Select Box**

**Instructions/Reminders**

**Search Results**

## Recommend Court Event – Case Event Interface

Figure 5.8 shows the Howard/Lawson case after being moved forward from the Case Submitted Event to the Recommend Court Event.

As illustrated, Canonical brings up the next event as prescribed by Canon law and immediately instructs the user as to the information necessary to fulfill the requirements for the current case event.

Canonical will repeat this methodology until the case arrives at completion.

The screenshot displays the 'Recommend Court' event interface. The top navigation bar shows the case name 'Howard / Lawson\*' and various tabs like 'Formal Annulment', 'Pending', 'Proposed', and 'Evidence'. The 'Recommend Court' tab is highlighted. The main content area contains several dropdown menus for selecting court personnel: Sole/Presiding Judge, Collegiate Judge 1, Collegiate Judge 2, Defender of Bond, Auditor, Assessor, Notary, and Petitioner's Advocate. A red circle highlights these dropdown menus. A yellow box at the bottom right points to this circle with the text 'Event Specific Data to Be Selected for New Event'. Another yellow box at the bottom left points to the 'Recommend Court' tab with the text 'Change in Event Notifies User'. The interface also includes a sidebar with navigation options and a main content area with a description: 'This Event allows for the Recommendation of Court Personnel.' and instructions: 'Please select from the options below to Continue.'

Figure 5.8

Change in Event  
 Notifies User

Event Specific Data to Be  
 Selected for New Event



## **Chapter 6 – Record Maintenance**

### **Purpose**

As with any software, Record Maintenance is a key ingredient within the Canonical system as well. The Record Maintenance portion of Canonical allows users to maintain data in an intuitive, succinct, user-friendly environment. Data can be viewed, added, edited and deleted all with only a few mouse clicks or keystrokes.

### **Methodology**

The Canonical Record Maintenance Methodology is simple: provide the user with an interface to search or select (from a short list) the record desired, retrieve the record from the database, display it in an editable form and then allow the record to be saved or deleted. For the addition of ‘new’ records a blank, editable form will be displayed allowing for entry of the data in question. Each record submission is checked for completeness (required fields) and if all criteria have been met the record will be stored into the database.

### **Required Fields**

Each key piece of data, record submission, case movement, document print event – virtually every aspect of the Canonical system is checked for completeness. The term used to identify these key pieces of data is ‘Required Fields’.

The Canonical system employs a system whereby the Required Fields are checked for completeness each and every time they are about to be written to the underlying database.

When records or data are found to be ‘incomplete’ the Canonical system will issue a series of ‘Required Field’ errors to assist the user in the discovery of the problem. Each error will notify the user as to the field and desired content that is in question. The user can simply browse back to the previous submission page and correct the issue.

By using Required Fields the accuracy of the data is maintained throughout the systems and future processing problems are prevented.

## Usage Examples

### Record Maintenance

Figure 6.1 below illustrates the opening screen of 'Parish User Maintenance'. This is a typical Record Maintenance screen and indicative of most Record Maintenance functions for the Canonical system.

The ability to maintain data is a key function within the Canonical system. Figure 6.1 below shows the two main areas of user interaction available for the Record Maintenance System (highlighted by the red circles): the Record Maintenance Functions and User Data/Field Input area.

To Add or Edit a 'Parish User' the Tribunal staff member would simply make the appropriate Parish selection from the drop-down selection and either enter the 'Parish User ID' or click 'Search' to retrieve all records that have been entered for that particular Parish.

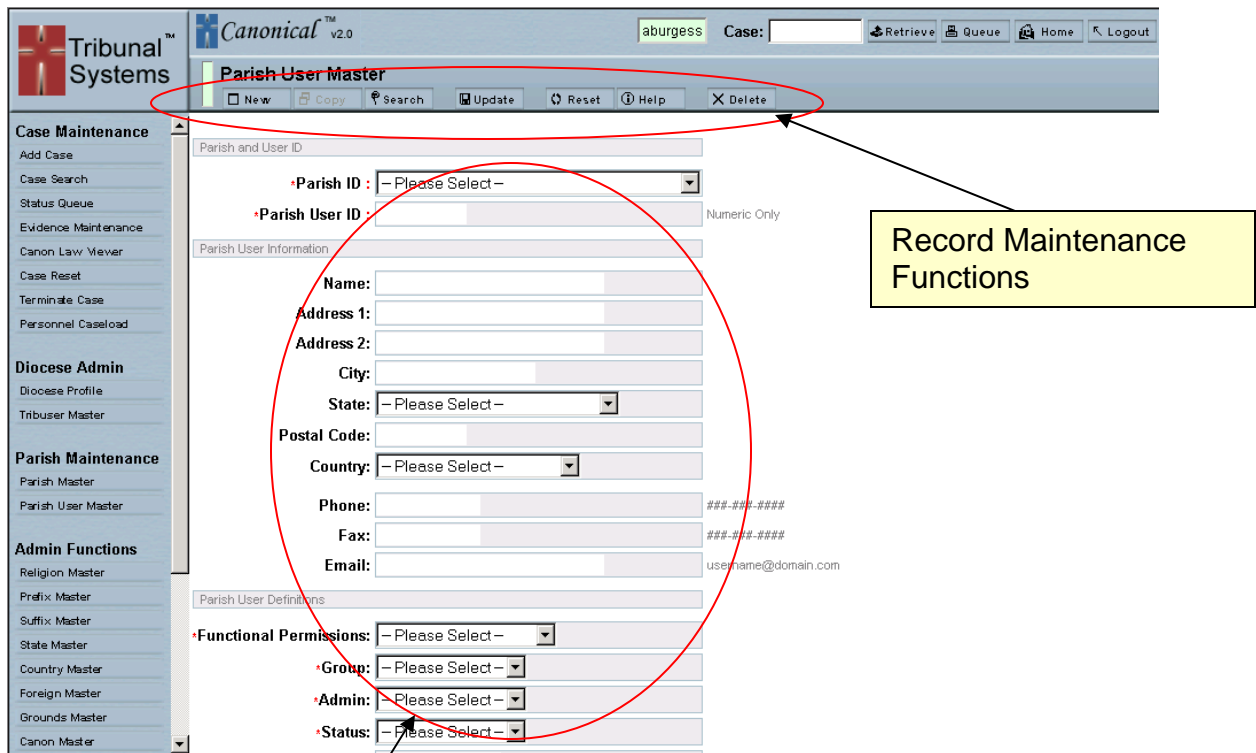


Figure 6.1

Entry/Data Fields

## Record Maintenance Functions

Figure 6.2 (following page) illustrates the Record Maintenance screen (for Parish Users) in detail. At the top of the screen you will see the various functions (highlighted red circle) available to the user. Using these functions the user has complete control over their maintenance functions and the ability to search the 'Parish User' database on almost any criteria imaginable.

The Record Maintenance Functions available to the user are:

- **New** – Used to clear the fields or current entry and reset the form to a un-entered 'new' status.
- **Copy** – Used to copy the current/selected record displayed and to allow for the entry of new 'key' field information.
- **Search** – Used to search the database for the partial information entered. If no information is entered the function will retrieve ALL records within that database.
- **Update** – Used to post and save the information entered within the input fields.
- **Reset** – Used to reset the form to its previous state. The data (if any) that was part of the initial selection will be restored to its original state.
- **Help** – Used to display the help information screen associated with the current database and fields.
- **Delete** – Used to delete the current record displayed. Please Note: The Record Maintenance system will issue a warning before deletion, however retrieval of deleted records is impossible.

Some functions may be disabled (grayed out) depending on the stage that you are currently on.

Please Note: To edit/modify or delete an existing record it is first necessary to select it from a 'search' screen. To do this search the database using the 'search' function and select (click) on the record you wish to edit. This will retrieve the information back to the entry screen and allow for modification. It is not possible to 'overwrite' existing records without first doing a 'search'.

**Parish User Master**

New  Copy  Search  Update  Reset  Help  Delete

Parish and User ID

\*Parish ID:

\*Parish User ID:  Numeric Only

Parish User Information

Name:

Address 1:

Address 2:

City:

State:

Postal Code:

Country:

Phone:  ###-###-####

Fax:  ###-###-####

Email:  username@domain.com

Parish User Definitions

\*Functional Permissions:

\*Group:

\*Admin:

\*Status:

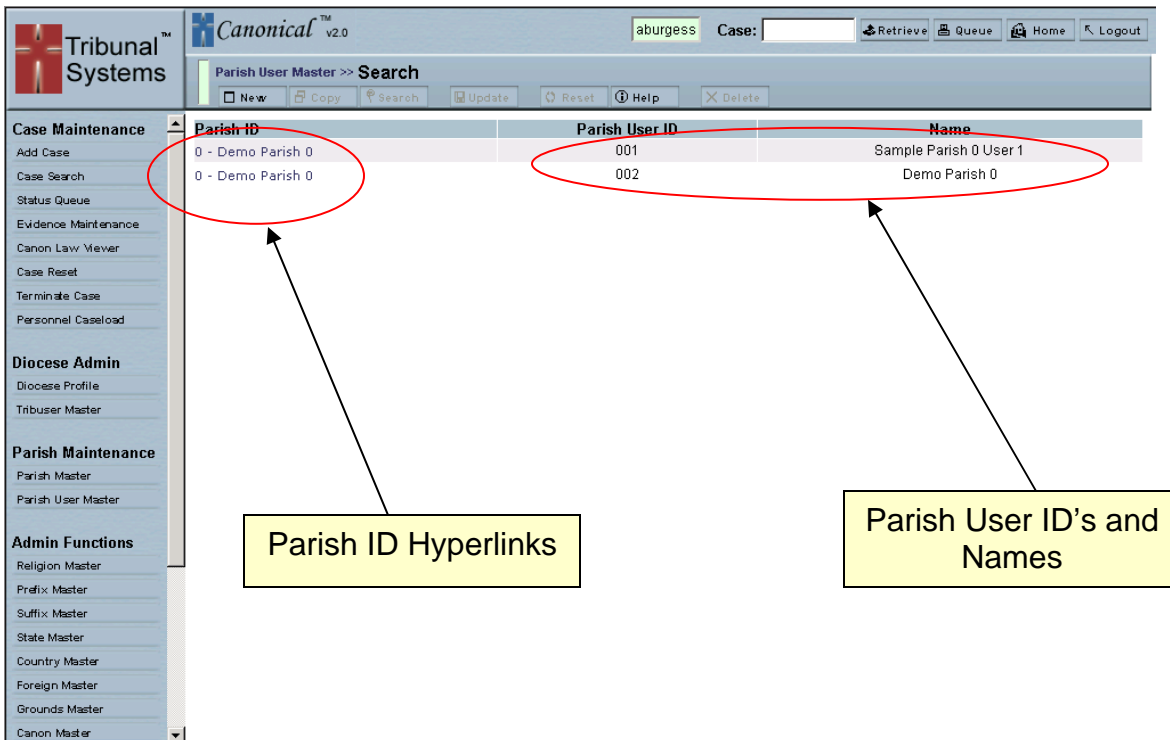
Record Maintenance Functions

Figure 6.2

## Search Function

Figure 6.3 illustrates the Search Record Maintenance function for the 'Parish User' screen. This displays all users assigned to the particular Parish selected from the opening Parish User Maintenance screen (figure 6.1).

Highlighted are the Parish information, User ID's and User Names already defined for the selected Parish (figure 6.2 previous page). To display the data for a particular Parish the user would mouse click on the hyperlinked Parish ID or the first field displayed on the search listing.



Parish ID	Parish User ID	Name
0 - Demo Parish 0	001	Sample Parish 0 User 1
0 - Demo Parish 0	002	Demo Parish 0

Figure 6.3

## Edit Existing Record

Figure 6.4 illustrates a 'selected' Record Maintenance screen. This displays the selected Parish User from the previous Parish User search screen (figure 6.3).

All data associated with the selected Parish User is displayed and ready for editing. The Tribunal staff member can now make modifications to the existing data and click 'Update' to save those changes back to the database. If the Tribunal staff member wished, he/she could click 'Delete' to remove the Parish User from the database.

Please Note: The 'Key Information' (circled below) has red colons between the label and the field as well as a 'non-editable' (view only) structure. This allows for the field to be seen but not changed, as this is vital to maintain record security.

The screenshot shows the 'Edit Record' screen for a Parish User. The 'Parish and User ID' section contains the following data:

- Parish ID : 0 - Demo Parish 0
- Parish User ID : 001 (Numeric Only)

The 'Parish User Information' section contains the following data:

- Name: Sample Parish 0 User 1
- Address 1: 300 N Saints Rd
- Address 2:
- City: Mesa
- State: Arizona
- Postal Code: 85224-6978
- Country: United States of America
- Phone: 555.555.5555
- Fax: 555.555.5555
- Email: username@domain.com

The 'Parish User Definitions' section contains the following data:

- Functional Permissions: 0 - Admin Permissions
- Group: 0 - All Functions
- Admin: N - No
- Status: A - Active

Figure 6.4

## Required Fields

Figure 6.5 illustrates a 'Required Fields Error' screen. This clearly marks the fields that are in error and verbiage describing the error can be found when the cursor is placed over the field label.

To correct the errors in question a user would simply enter the correct information and re-update the page.

Highlighted are the fields in an error state.

The screenshot shows the 'Parish User Master >> Required Fields Error' screen. The form contains the following fields:

- Parish and User ID
  - \*Parish ID: 0 - Demo Parish 0
  - \*Parish User ID: 001 (Numeric Only)
- Parish User Information
  - Name: Sample Parish 0 User 1
  - Address 1: 300 N Saints Rd
  - Address 2:
  - City: Mesa
  - State: Arizona
  - Postal Code: 85224-6978
  - Country: United States of America
  - Phone: 555.555.5555 (###-###-####)
  - Fax: 555.555.5555 (###-###-####)
  - Email: username@domain.com
- Parish User Definitions
  - \*Functional Permissions: - Please Select -
  - \*Group: - Please Select -
  - \*Admin: - Please Select -
  - \*Status: A - Active

A red circle highlights the 'Functional Permissions', 'Group', and 'Admin' dropdown menus. A yellow box labeled 'Fields in Error' has an arrow pointing to this highlighted area.

Figure 6.5

## Chapter 7 – Document Rendering System

### Purpose

Over 750 distinct documents have been incorporated into the Canonical system platform. These documents are fully editable and can be delivered online, to any accessing individual, anywhere in the world. The documents are attached to case events and rendered at the appropriate times during the case process. Documents can also be printed stand-alone when copies are needed and/or requested. The Canonical Document Rendering System also integrates and prints envelopes.

All documents are rendered to a base Microsoft Word document that can be displayed back to the user in its native form. Documents can also be re-rendered into Adobe Acrobat or HTML based objects. This allows for document management, print tools and download bandwidth constraints that are at the user's discretion.

### Document Print Link Example

Figure 7.1 illustrates a typical Event being rendered from the Canonical system during the case process. The Event displayed contains Document Print Links (red circle) that the user must click in order to render the appropriate information into a printable (letter) form.

The screenshot displays the Canonical v2.0 web application interface. At the top, the user 'aburgess' is logged in, and the case details are shown: 'Formal Annulment', '2002-0251', 'Ventner/Brown', 'Proposed', and 'Evidence'. The 'Print Citation Documents' event is selected. The main content area shows the event description: 'This Event allows for the printing of the Citation Documents.' Below this, there are three document print link sections:

- Print Acceptance & Citation Decrees** (circled in red): Documents Included in this Print Link:
  - Decree Accepting the Petition [Petitioner] - ACC08.00
- Print Petitioner Citation Documents**: Documents Included in this Print Link:
  - Citation Letter to Petitioner - CIT02.00
  - Response to Members of the Court [Petitioner] - CIT04.00.a
- Print Respondent Citation Documents**: Documents Included in this Print Link:
  - Witness List - PRE03.00
  - Citation Letter to Respondent - CIT03.00
  - Declaration by Respondent to Rest Case on the Court - CIT05.00
  - Respondent Response Form [Respondent] - CIT06.00.a
  - Procurator Advocate List [Respondent] - CIT06.02.b
  - Procurator/Advocate Mandate [Respondent] - PRE04.00.b

A yellow callout box labeled 'Document Print Link' points to the 'Print Acceptance & Citation Decrees' link.

Figure 7.1



## Document Spooling Window

Figure 7.2 illustrates the Document Spooling Window. Once the user clicks on the Document Print Link (as shown in figure 7.1) the illustrated window (7.2) will appear as a visual notice that the documents are being submitted to the rendering engine. This window will only be displayed for a few seconds and will close once the document submission is complete.

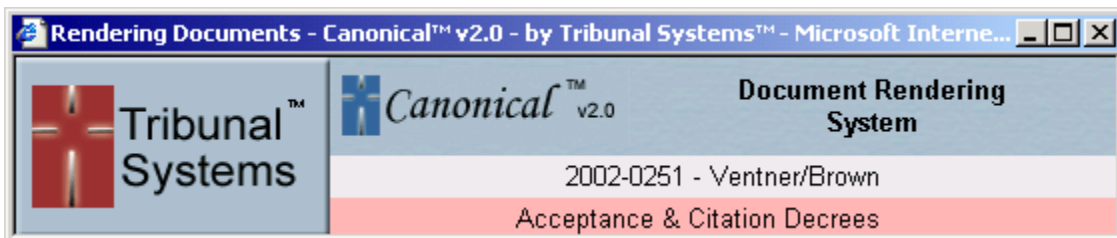


Figure 7.2

## Activating Print Queue

Figure 7.3 is an illustration of the upper right hand corner of the Canonical display screen. The red circle shows the button to click to activate the Print Queue. Once this button is clicked the Document Print Queue will be displayed within the body or content section of the Canonical system.

The Document Print Queue is where all rendered documents within the Canonical system are stored until they are deleted. These Documents can be printed at the discretion of the user.

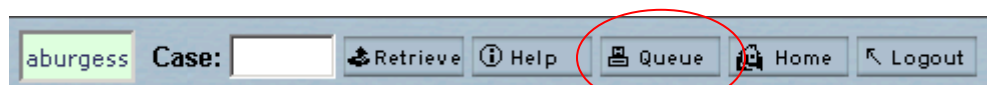


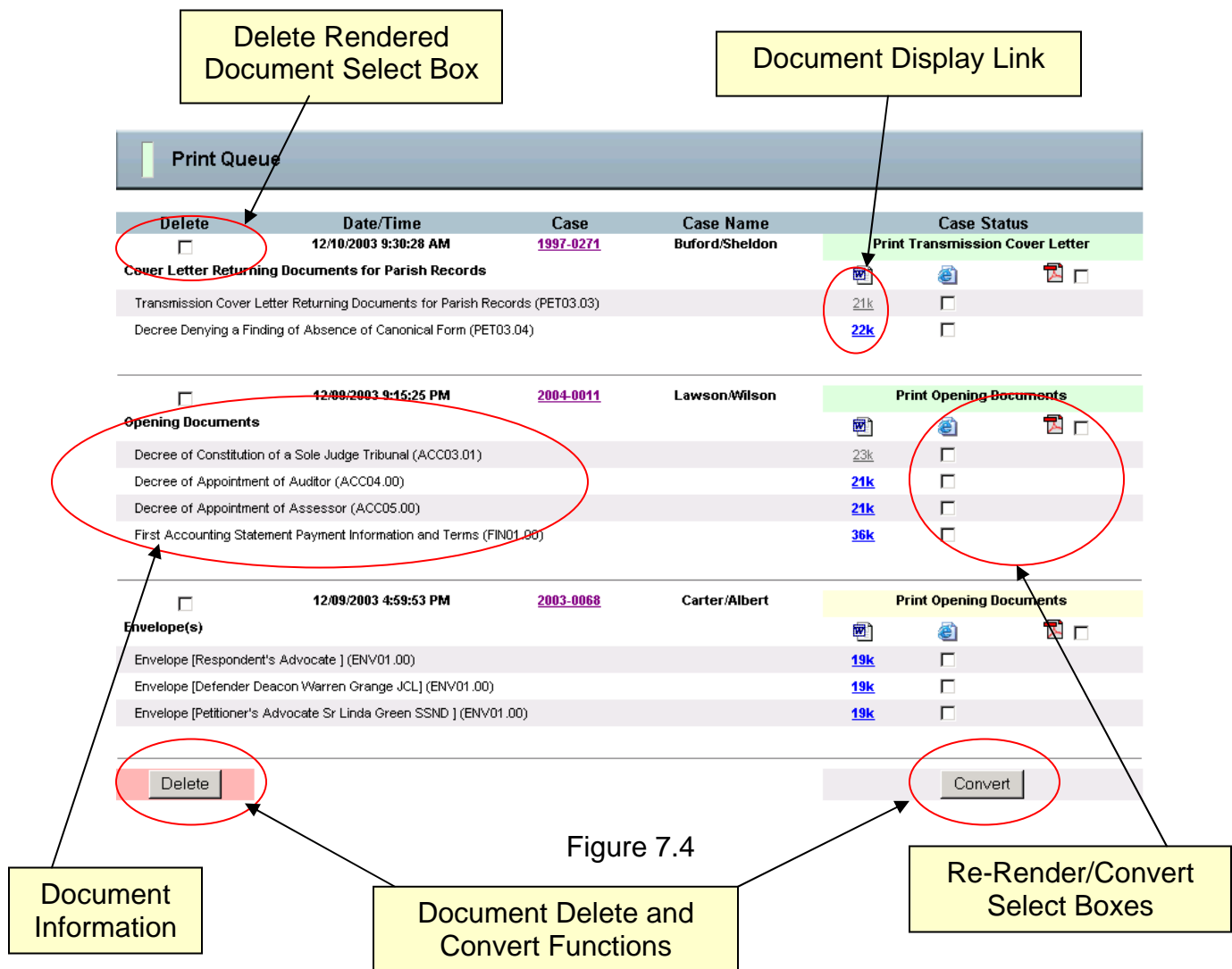
Figure 7.3

Document Print Queue  
Activation Button

**Print Queue**

Figure 7.4 illustrates the Document Rendering Print Queue of the Canonical system. The red circles highlight the various areas of the Print Queue that enable the user to manage their rendered documents.

- **Document Display Link** – Allows users to display the documents that were rendered back to them.
- **Re-Render/Convert Select Boxes** – Allows users to add the documents to their queue in a different or ‘re-rendered’ format. Selection of these format types must be followed with a click on the ‘Convert’ button.
- **Document Information** – This section allows the users to view the various documents contained within the printed event.
- **Delete Rendered Document Select Box** – Allows users to select rendered documents for deletion. Selection of particular documents must be followed by a click on the ‘Delete’ button.
- **Delete and Convert Buttons** – These buttons allow for the selected functions to be carried out.



## Chapter 8 – Evidence System

### Purpose

Depending on the type of case being processed a Tribunal can produce an extraordinary amount of evidence that requires extensive hands-on manipulation. Documents that are collected and filed during the ‘evidence gathering’ phase of a case will sit and wait to be retrieved again by personnel so that decision makers can peruse them at a later date. This process, although necessary, adds an additional burden to an already overloaded Tribunal staff. Canonical helps ease the burden of filing and retrieving evidence by allowing staff members to attach scanned images of evidence directly to a case. Decision makers can, at any time during the case process, view any attached case evidence.

### Evidence Scanning

Canonical allows evidence attachment of file types: pdf, tiff, tif, jpg, jpeg and gif. Evidence can be scanned to a local hard-drive through any mainstream scanner. The staff member can then upload the evidence directly to the Canonical system. Evidence office filing (to file cabinet or other) can still take place as it did before if your Tribunal requires it.

### Evidence Interface Examples

Figure 8.1 and 8.2 illustrate the Canonical Evidence Interface.

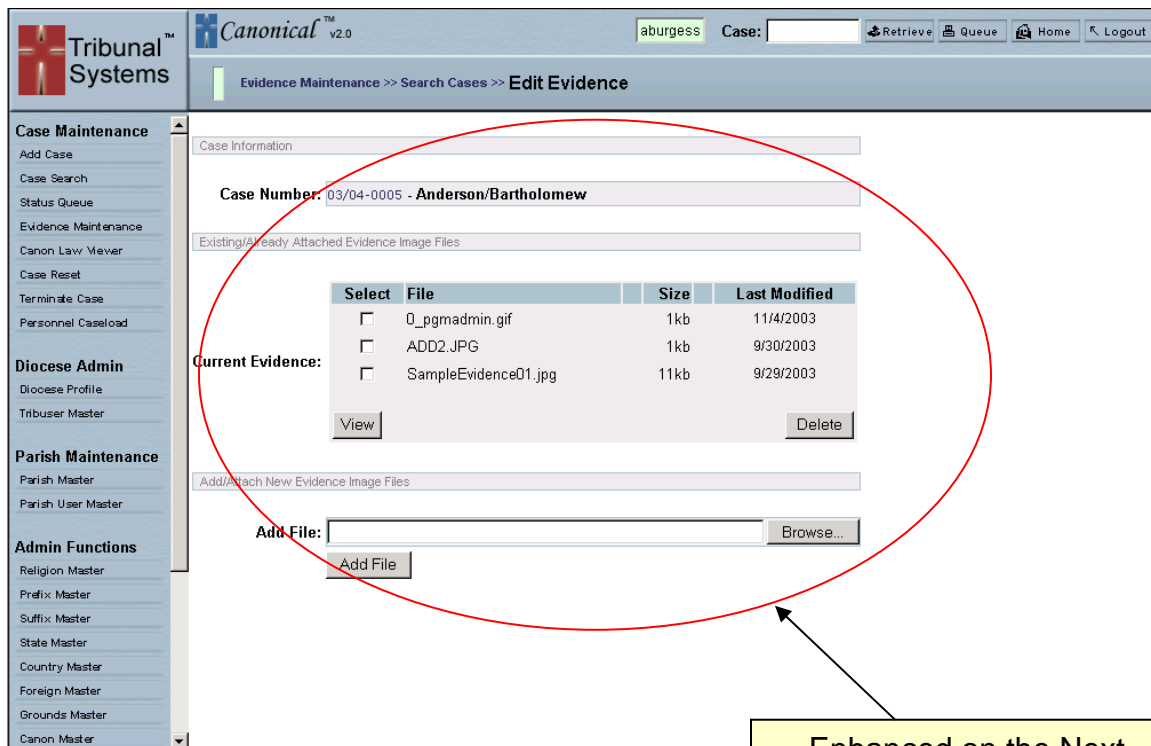


Figure 8.1

Enhanced on the Next Page in Figure 8.2

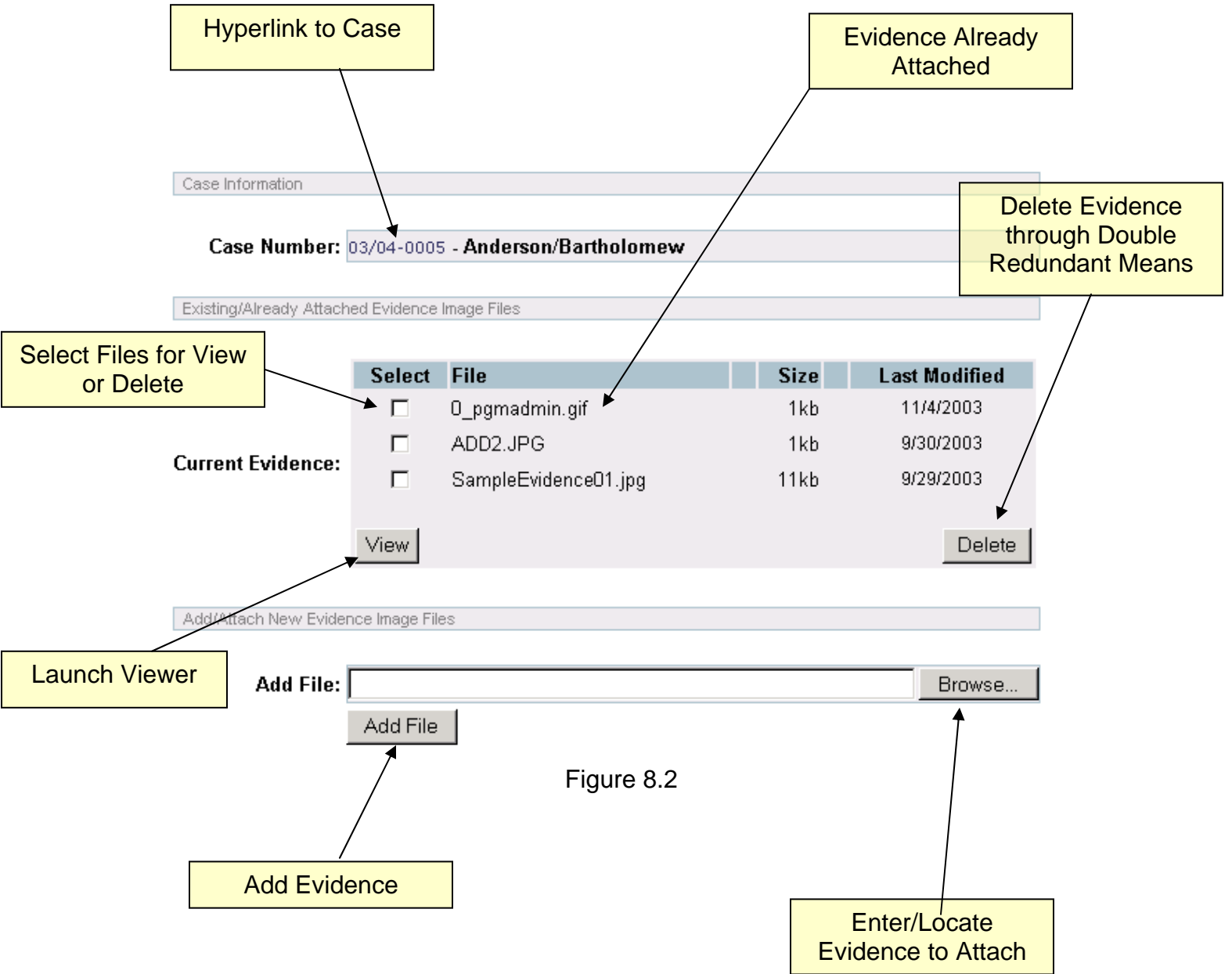


Figure 8.2

## Evidence Viewing Example

Figure 8.3 illustrates viewing evidence through the Adobe Acrobat Reader.

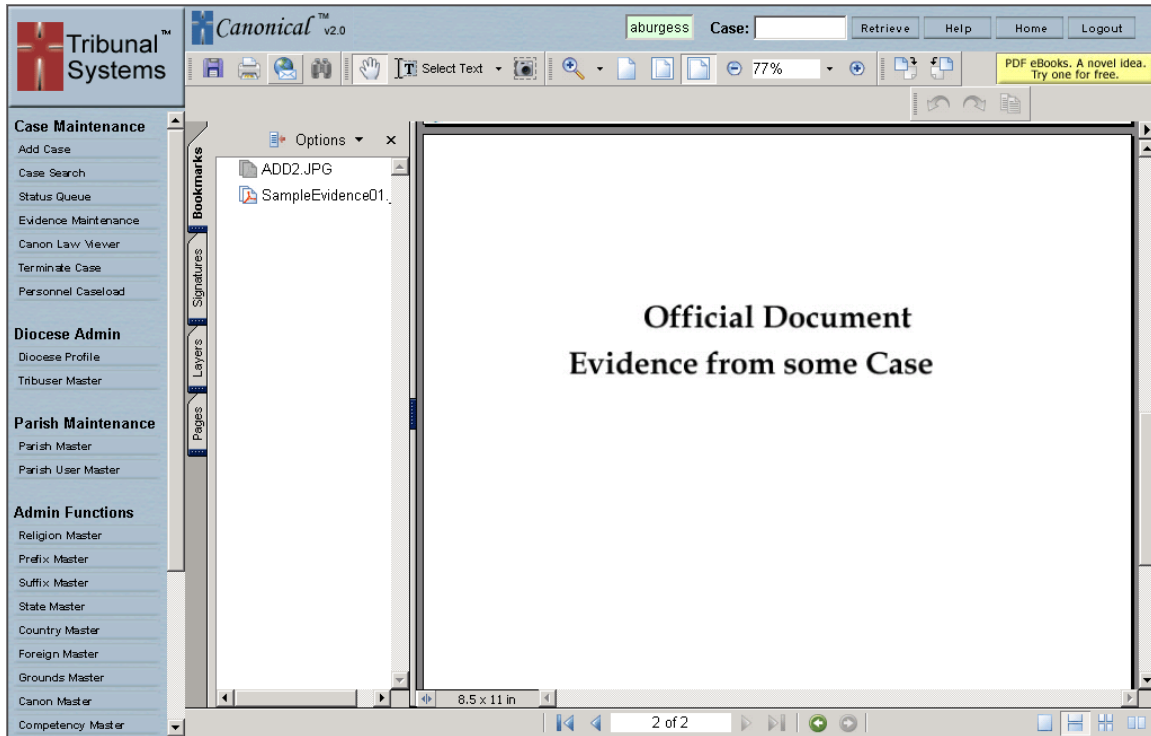


Figure 8.3

## Chapter 9 – Export Case Data

### Purpose

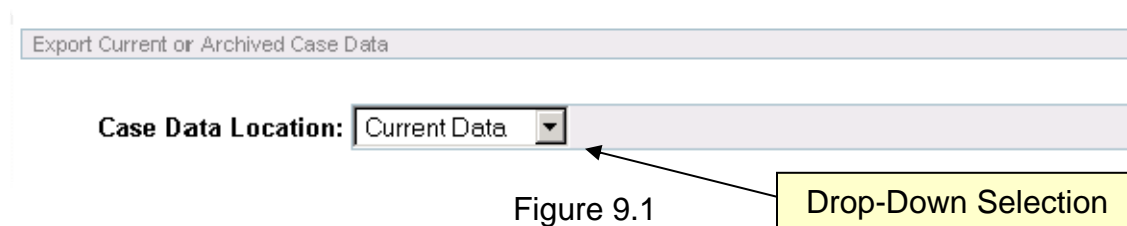
The Export Case Data function allows Canonical Administrator personnel to view and export case information that resides within the database system. This function allows personnel to see key case data and other information that otherwise would be obscured by the overlaying system. Once viewed, the information can then be exported or 'copy & paste' to a spreadsheet program and manipulated by the user. Other case information can be included for each case depending on the users preferences.

### Case Data Location

Figure 9.1 illustrates the drop-down box that selects the origin or 'location' of the data to be requested.

The selection marked as 'Current' allows the query and reporting of the data that is currently active within the Canonical system.

The selection marked as 'Archive' allows the query and reporting of data that is held within the archives.



### Decision Definitions

Figure 9.2 (following page) illustrates the Export Case Data's Decision Definitions section. This area allows for the decision criteria to be entered and defined (if needed). Each line within this area works in the same manner and will greatly increase or decrease the number of records (results) returned.

For a record to be displayed it must be pass as 'valid' or 'true' by the definitions entered. As more definitions are entered the amount of records passing as valid or true will decline.

To display the maximum amount of records enter little or no decision criteria.

PLEASE NOTE: If the criteria entered is sparse the number of reporting records trying to return MAY EXCEED your browser's limitations!

Decision Definitions		
Case Number:	<input type="radio"/> N/A <input checked="" type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value:2003-0100 <span style="float:right">###-### or ###-###</span>
Origination Date:	<input type="radio"/> N/A <input checked="" type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value:2003 <span style="float:right">YYYYMMDD</span>
Filing Date:	<input type="radio"/> N/A <input type="radio"/> > <input type="radio"/> < <input checked="" type="radio"/> <> <input type="radio"/> =	Value: <span style="float:right">YYYYMMDD</span>
Accept Date:	<input checked="" type="radio"/> N/A <input type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value: <span style="float:right">YYYYMMDD</span>
Reject Date:	<input checked="" type="radio"/> N/A <input type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value: <span style="float:right">YYYYMMDD</span>
Closed Date:	<input checked="" type="radio"/> N/A <input type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value:2004 <span style="float:right">YYYYMMDD</span>
Terminate Date:	<input checked="" type="radio"/> N/A <input type="radio"/> > <input type="radio"/> < <input type="radio"/> <> <input type="radio"/> =	Value: <span style="float:right">YYYYMMDD</span>

Figure 9.2

### Decision Entry Criteria

Figure 9.3 illustrates the Origination Date line of the Decision Definition criteria entry. Each 'Operator' (red circle) is akin to the mathematical operators of the same function and will evaluate as such.

The Value field shown will be the criteria to which the Operator will be applied. The data entered within the Value field must be of a type to match the definition e.g. numeric for date fields, etc.

Origination Date:  N/A  >  <  <>  = Value:2003 YYYYMMDD

Figure 9.3

Operator Criteria

Value Criteria

### Operator Definitions:

- **N/A** 'Not Applicable' - When selected the function will ignore this Definition regardless of the Value entered.
- **>** 'Greater Than' – When selected the function will report all records GREATER THAN the Value entered.
- **<** 'Less Than' – When selected the function will report all records LESS THAN the Value entered.
- **<>** 'Not Equal' – When selected the function will report all records NOT EQUAL to the Value entered.
- **=** 'Equal' – When selected the function will report all records EQUAL to the Value entered.

Example Usage:

1. Figure 9.4 illustrates a definition to retrieve all records that have a 'Case Number' Greater Than '2003'. Please note that the entire Value field need not be entered – partial entries are allowed and encouraged. The Value as entered '2003' will match any Case Number that begins with '2003' and greater (e.g. 2003-0001, 2004-9999, etc.).

Case Number:  N/A  >  <  <>  = Value:2003  ####-#### or ####-####

Figure 9.4

2. Figure 9.5 illustrates a definition to retrieve all records that have an 'Accept Date' that is Not Equal to blank (non-blank, not null, data present within the field, etc.). Please note that a blank entry in the Value field is allowed. BE CAREFUL – if the function does not report the expected records make sure that all unwanted decision fields are selected as 'N/A'.

Accept Date:  N/A  >  <  <>  = Value:  YYYYMMDD

Figure 9.5

3. Figure 9.6 illustrates two definitions used together. This will retrieve all records that have an 'Origination Date' Less Than '2002' **AND** a 'Filing Date' Equal to '20041015' (October 15<sup>th</sup>, 2004). Please note that records reported will only be so if ALL criteria entered is met (resolved as true).

Origination Date:  N/A  >  <  <>  = Value:2002  YYYYMMDD  
 Filing Date:  N/A  >  <  <>  = Value:20041015  YYYYMMDD

Figure 9.6

**Data To Include**

Figure 9.7 (following page) illustrates the 'Data to Include' section of the Export Case Data function. The Export Case Data function will automatically report (by default) Case Number, Case Dates and Case Name. The Data to Include area allows the user to select added reporting data.

The checkboxes to the right of the field allow for the inclusion of that particular data onto the report.

In this example the data for Case Personnel, Petitioner Name, Petitioner Address, First Instance Decision and Terminate Reason will be added to the report.



Data to Include

Case Type Name:  Include

Case Status:  Include

Case Personnel:  Include

Petitioner Name:  Include

Petitioner Address:  Include

Respondent Name:  Include

Respondent Address:  Include

First Instance Decision:  Include

Second Instance Decision:  Include

Third Instance Decision:  Include

Terminate Reason:  Include

Blank Entry of Decision Data with 'N/A' Will Return All Records.

[Export/View](#)

Figure 9.7

### Exporting Data

Figure 9.8 illustrates the results of a generated report. To export this data to a spreadsheet simply highlight as illustrated in 9.9 (following page), right click to copy and paste into a spreadsheet as illustrated in 9.10 (following page). You are now free to manipulate the data in whatever way chosen.

Export Case Data >> Results

To Copy this Data to a Spreadsheet: Highlight then Cut & Paste

Case Location	Case Number	Case Name	Origination Date	Filing Date	Accept Date	Reject Date	Closed Date	Terminate Date
Current	2003-0047	Grundie/Wong	20030219		20031002			
Current	2002-0251	Ventner/Brown	20030601		20030930			
Current	2002-0455	Alvarez/Marco	20030601	20030101	20030101	20030101	20031210	20030725

Figure 9.8

Export Case Data >> Results

To Copy this Data to a Spreadsheet: Highlight then Cut & Paste

Case Location	Case Number	Case Name	Origination Date	Filing Date	Accept Date	Reject Date	Closed Date	Terminate Date
Current	2003-0047	Grundie/Wong	20030213		20031002			
Current	2002-0251	Ventner/Brown	20030601		20030930			
Current	2002-0455	Alvarez/Marco	20030601	20030101	20030101	20030101	20031210	20030725

Figure 9.9

Microsoft Excel - Book1

File Edit View Insert Format Tools Data Window Help

F4 = 20030101

	A	B	C	D	E	F	G	H	I	J
1	Case Location	Case Number	Case Name	Origination Date	Filing Date	Accept Date	Reject Date	Closed Date	Terminate Date	
2	Current	2003-0047	Grundie/Wong	20030213		20031002				
3	Current	2002-0251	Ventner/Brown	20030601		20030930				
4	Current	2002-0455	Alvarez/Marco	20030601	20030101	20030101	20030101	20031210	20030725	
5										
6										
7										

Figure 9.10

## Chapter 10 – User Security Definitions

### Purpose

The User Security Definitions allows Canonical Administrator personnel to assign or revoke System Menu, Case Role, working case permissions and security levels. The various settings within the Tribunal User (Tribuser) and Parish User functions can be tailored to the individual user within a particular environment.

User security levels should be assigned according to each person's office duties and not their Tribunal case role function. Example: Although a Notary may process most case functions they may also need to maintain Parish and Parish User data. They may be required to perform other duties using the system that dictate them having more than 'Notary' permissions.

### Tribuser Definitions

Figure 10.1 illustrates the Tribuser Definition section within the Tribuser Maintenance function. This section's definitions work similar to the Parish User Definition section and knowledge can be transferred to that function as well.

We will discuss each setting in detail and what impact it will make within the Canonical system.

The screenshot shows a form titled "Tribuser Definitions" with the following fields:

- \*Notary Manager:** A dropdown menu with the text "- Please Select -".
- \*Offlist Personnel:** A dropdown menu with the text "- Please Select -".
- \*Functional Permissions:** A dropdown menu with the text "- Please Select -".
- \*Case Role:** A dropdown menu with a list of options: "- Please Select -", "A - Petitioners Advocate", "B - Assessor", "C - Auditor", "D - Defender of Bond", and "J - Sole/Presiding Judge".
- \*Group:** A dropdown menu with the text "- Please Select -".
- \*Admin:** A dropdown menu with the text "- Please Select -".
- \*Status:** A dropdown menu with the text "- Please Select -".
- \*Password:** A text input field.

Figure 10.1

## Notary Manager

Figure 10.2 illustrates the Notary Manager setting for the Tribuser Maintenance function. This setting allows for an individual to gain or lose Notary Manager system permissions.

The Notary Manager selection has two settings:

- **No** – This individual does not have Notary Manager permissions
- **Yes** – This individual does have Notary Manager permissions
  - Enables Notary Case assignment within individual’s Home Page Queue
  - Enables secure Case Information fields to appear

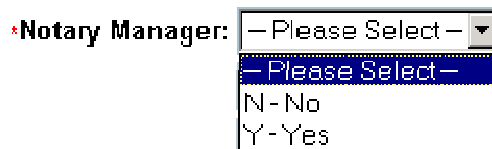


Figure 10.2

## Offlist Personnel

Figure 10.3 illustrates the Offlist Personnel setting for the Tribuser Maintenance function. This setting allows for an individual to be set as 'Offlist'.

Offlist Personnel are allowed to work within the Canonical system on a case by case basis (by an assigned Case Role) but once that case is finished (being Archived) that user code is deleted. Offlist user codes will only be deleted during the Case Archiving process and only if they are not assigned to any other case.

The Offlist Personnel selection has two settings:

- **No** – This individual is not Offlist Personnel
- **Yes** – This individual is Offlist Personnel
  - User code will be deleted once case is Archived

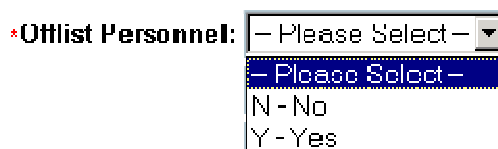


Figure 10.3

## Functional Permissions

Figure 10.4 illustrates the Functional Permissions setting for the Tribuser Maintenance function. This setting allows for an individual's Case Movement and Case Functions and Case Events to be allowed or disallowed.

Functional Permissions dictate what areas of a case personnel can and cannot access. All Functional Permission settings can be defined and set by the particular Tribunal using a specific deployment of the Canonical system. If you are not sure which permissions are set to certain areas please consult your Canonical Administrator.

Please Note: The **Admin Permissions** selection enables the user to access any case and perform most functions unchecked. This setting should only be assigned to administrator personnel!

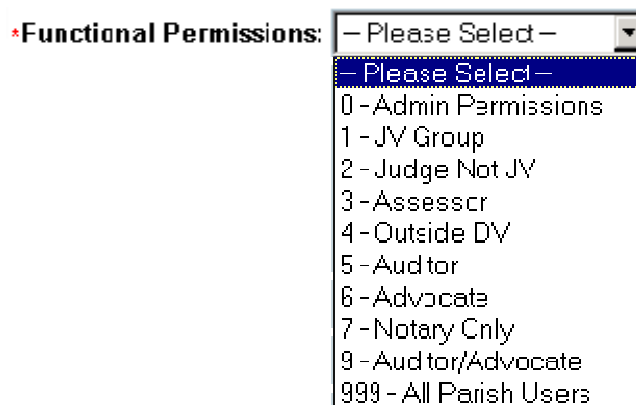


Figure 10.4

## Case Role

Figure 10.5 (following page) illustrates the Case Role setting for the Tribuser Maintenance function. This setting allows for an individual's Case Role to be set.

The Case Role of any particular user dictates what function they will serve within the Tribunal case process. Once selected for a particular Case Role the individual user will appear within the assigned group during the Case Personnel selection process.

Example: If the user is assigned as a Notary – during the Case Personnel selection process they could be chosen as the Notary designated for a particular case.

This is a multi-selection setting and any individual user can be assigned more than one Case Role. To assign multiple Case Roles please hold down the 'Ctrl' key while mouse-clicking the appropriate selections.

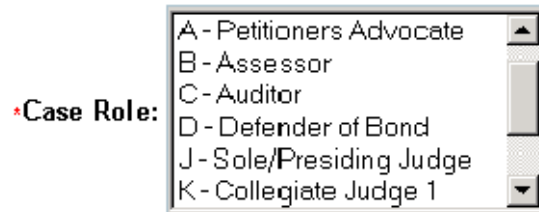


Figure 10.5

## Group

Figure 10.6 illustrates the Group setting for the Tribuser Maintenance function. This setting allows for the display of an assigned set of Menu Functions (left side of Canonical System Display). The ability of users to run certain functions is assigned by this setting.

All Group settings can be defined and set by the particular Tribunal using a specific deployment of the Canonical system. If you are not sure which Group settings are for certain functions please consult your Canonical Administrator.

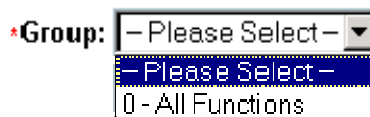


Figure 10.6

## Admin

Figure 10.7 (following page) illustrates the Admin setting for the Tribuser Maintenance function. This setting allows for the display of the assigned set of Menu Functions (left side of Canonical System Display) that have Admin or Administrative properties.

For any given Group (above) of System or Menu Functions there can also be a set of Administrative functions. These functions are not visible to the 'regular' users assigned to that Group but are available to the Administrative users.

These functions are dependent on the particular deployment of the Canonical system. If you are not sure which functions are Administrative please consult your Canonical Administrator.

The Admin selection has two settings:

- **No** – This individual is not Administrative Personnel
- **Yes** – This individual is Administrative Personnel
  - User can access all Administrative Menu Functions

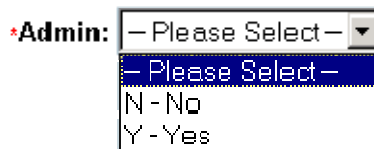


Figure 10.7

## Status

Figure 10.8 illustrates the Status setting for the Tribuser Maintenance function. This setting allows or disallows access to the Canonical system.

Once updated this setting will immediately affect users logged into the Canonical system with the particular user code.

The Status selection has two settings:

- **Active** – This individual is allowed access to the Canonical system
- **Inactive** – This individual is not allowed to access or enter the Canonical system.

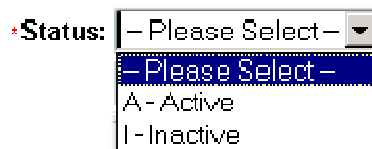


Figure 10.8

## Password

Figure 10.9 illustrates the Password field for the Tribuser Maintenance function. This field allows the Canonical system login and movement password to be set.

During each and every function the Canonical system checks to ensure the user accessing the system has the proper password and privileges to execute the desired functions. Whenever the password or privileges do not meet expectations the user is automatically logged off of the system.

Once updated this setting will immediately affect users logged into the Canonical system with the particular user code.

Please Note: If you suspect, or are aware of, a user code being compromised or improperly used you should, or have the owner of the code, change the Password immediately! This will require all users accessing the system with that code to log back into the system using a valid code and password combination.

Valid values for the Password field are numeric (0-9) and printable alpha lower and uppercase (a-z, A-Z).

\*Password:

Figure 10.9



## Chapter 11 – Canonical Help System

### Purpose

The Canonical Help System allows users of both portals (Diocese and Parish) to access Help documentation with the click of a button. Help documentation is completely searchable and can be viewed in several ways. Search results are highlighted and linked to their parent category for easy navigation. Unlike web search engines, the Canonical Help System shows the entire entry for a given result, which allows users to find answers to their questions more efficiently.

### Activating Help

Figure 11.1 is an illustration of the upper right hand corner of the Canonical display screen. The red circle shows the button to click to activate the Help System. Once this button is clicked the Canonical Help System will be displayed within its own window. This design allows users to peruse the Help documentation while still maintaining their regular session and its contents.

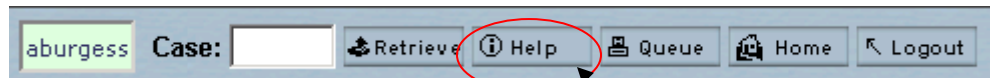


Figure 11.1

Help Button

## Main Help Page

Figure 11.2 illustrates the Main Canonical Help System page (an abbreviated version). This screen allows users to begin their search by keyword or to click on a Help Category to view it in its entirety.

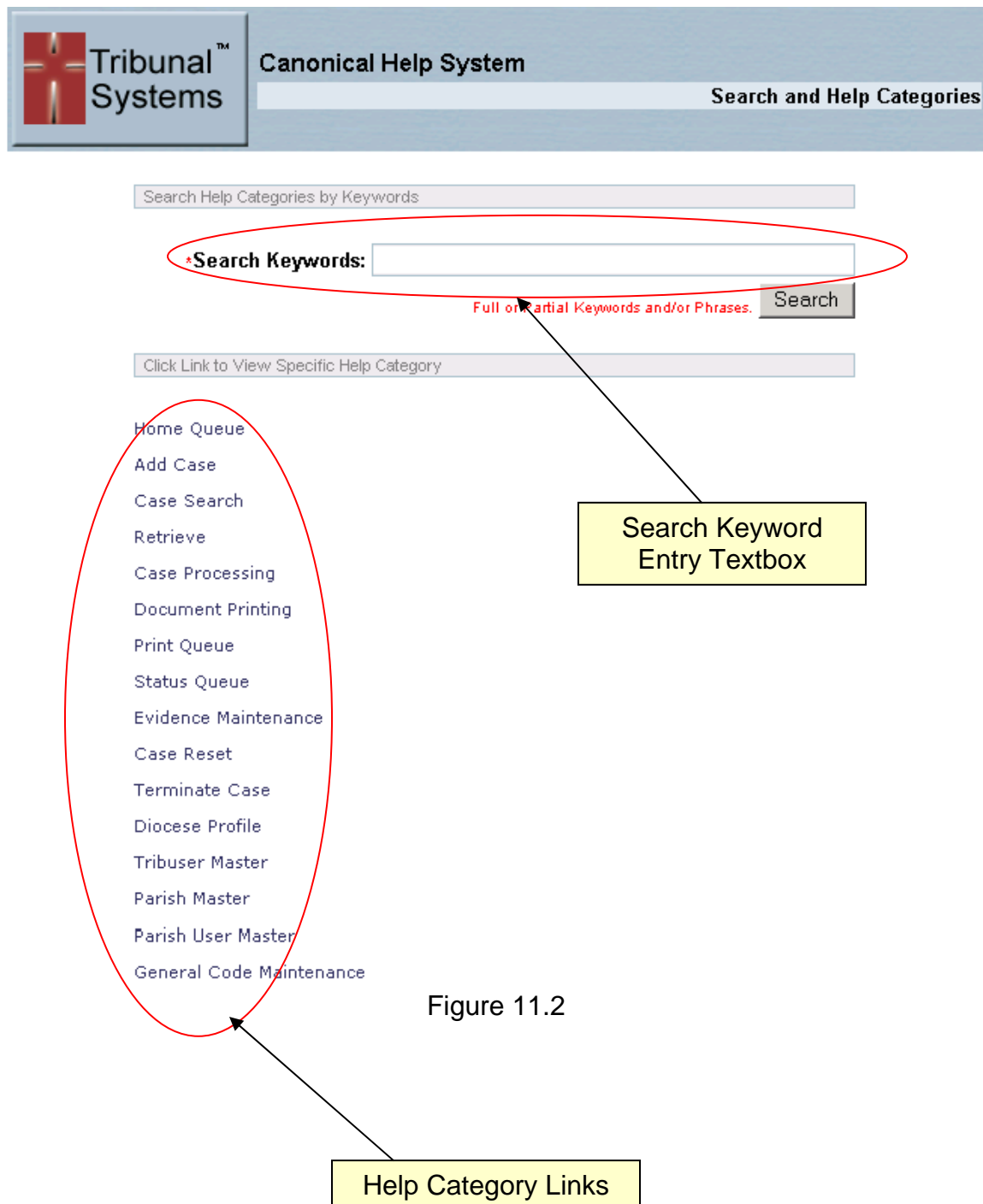


Figure 11.2

**Search Results Page**

Figure 11.3 illustrates a Canonical Help System Search Results page (an abbreviated version). This screen allows users to view the results of their search criteria and go directly to the Help Category containing the section.

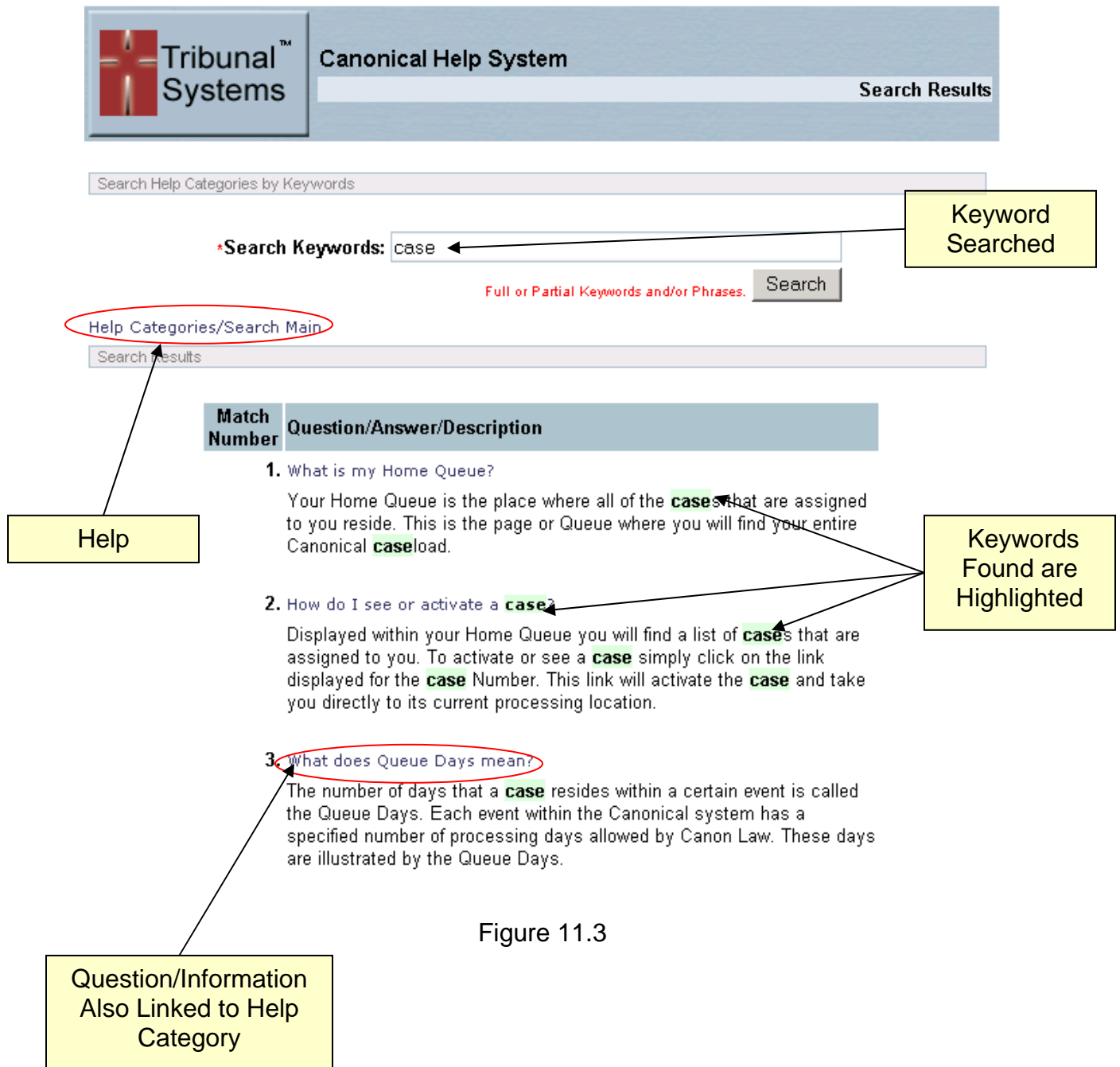


Figure 11.3

## Help Category Page

Figure 11.4 illustrates a Canonical Help System Help Category page (an abbreviated version). This screen allows users to view the entire Help Category.

The screenshot shows the Canonical Help System interface. At the top left is the Tribunal Systems logo. To its right is the text 'Canonical Help System'. Further right, the text 'Home Queue' is circled in red. Below this is a navigation bar with 'Full Help Category Listing'. Below the navigation bar are two buttons: 'Previous Page' (circled in red) and 'Link Back to Previous Page'. To the right of these buttons is a yellow box labeled 'Help Category'. Below the buttons is a list of four questions:

- 1. What is my Home Queue?**  
Your Home Queue is the place where all of the cases that are assigned to you reside. This is the page or Queue where you will find your entire Canonical Caseload.
- 2. How do I see or activate a Case?**  
Displayed within your Home Queue you will find a list of cases that are assigned to you. To activate or see a case simply click on the link displayed for the Case Number. This link will activate the case and take you directly to its current processing location.
- 3. What does Queue Days mean?**  
The number of days that a case resides within a certain event is called the Queue Days. Each event within the Canonical system has a specified number of processing days allowed by Canon Law. These days are illustrated by the Queue Days.
- 4. What do the Queue Day colors mean?**  
The colors for the Queue Days are a reflection of the amount of time in percentage form that has elapsed for a case in a certain event. They are used as a visual notification of the status of each case.  
When a case is below 70% of the allowed days for an event the Queue Day color will be GREEN.  
When a case is between 70% and 100% of the allowed event days the Queue Day color will be YELLOW.  
When a case is at 100% or more of the allowed event days the Queue Day color will be RED.

Annotations include a yellow box on the left labeled 'Question or Help Section Title' with an arrow pointing to question 3, and a yellow box at the bottom labeled 'Answer or Help Information' with an arrow pointing to the text of question 4. A large red oval encircles the text of question 4 and its sub-points.

Figure 11.4