

Oregon eCourt The QUARTERLY

Oregon Judicial Department

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The QUARTERLY with ERICKSON, PHILLIPS, HAINES, & SELLS

by Eve Dedek, Staff Writer

January 13, 2012. A QUARTERLY interview, live from the Codes Workshop with four Configuration Team members, **Angie Erickson - Judicial Support Specialist 3**/Klamath County Circuit Court, **Carmen Phillips - Deputy TCA**/Lane County Circuit Court, **Ellen Haines - Applications Training**/Multnomah County Circuit Court, and **Andy Sells - Court Manager**/Washington County Circuit Court. At the time of this interview the team is wrapping up the Code Workshop to finalize the codes we will keep for Odyssey. The team begins work on business processes the end of January working through February.

QUARTERLY: The Config Team's role is to identify Oregon statutes, uniform trial court rules, codes, and business process rules that will be configured in preparation for Odyssey implementation in the pilot court and early adopter courts. So, as you've gone through this whole process did your role change or evolve in any way and if so, how did it?

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Config Team Members, L to R: Andy Sells, Carmen Phillips, Ellen Haines, and Angie Erickson





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ERICKSON: Mine definitely did because I was initially only involved in the Fit Assessment as far as I knew. And then it was like, "Come back...we're doing the configuration now." It went from three weeks to seventeen, and eighteen now.

PHILLIPS: Yeah, I'd say that was true probably for all of us. Coming into it we didn't know. I knew that there would be more than just the Fit Assessment for the duration. I would say, I don't know if this is really on target with what you are asking, but I feel like everybody's role has evolved a lot because coming into this I think we didn't really know for sure what was meant by configuration. I mean we thought, "okay we'll be reviewing code tables and things like that," but we've become quite knowledgeable in how Odyssey works and so we've been able to better evaluate our current business processes as they live in OJIN. As a result, we can give information to Tyler about what needs to happen in Odyssey. In the beginning we weren't thinking that way because we didn't have enough exposure to Odyssey yet. So, things have evolved in terms of understanding what our role is and being able to contribute more. If that makes sense.

HAINES: I agree. Adding onto that too, I think part of that has been as we've learned about Odyssey we're going back to our courts thinking: "here's what we could do with the Odyssey system..." and by showing other staff and supervisors some of the capabilities that we'll have with Odyssey, it gets people excited about it. This also allows us to really develop these new [Odyssey] processes and improve the way that things are going to work in the new system.

PHILLIPS: And talk to people at our courts. I mean I find myself often, you know, somebody will say something and I'll say, "Oh! In Odyssey it's going to work this way." And so that too, because in the beginning I of course wasn't saying those things, I was just learning.

SELLS: Absolutely.

QUARTERLY: What did you wind up working on that you didn't originally expect to be working on? Were there any issues that came up that weren't expected that you solved or helped with?

ERICKSON: I think the judgment components. I didn't realize we were going to be so involved in the development of those components.

PHILLIPS: Yeah I think that's true. What I learned was that Tyler doesn't have - when they

come into any court - they don't have a set of expectations around how the judgment programs are going to work. And also for Oregon, the financial is significantly different as well, so I would add that too in addition to the judgments, the financial piece of it.

QUARTERLY: In the financial piece, do you know what the comparison is....

PHILLIPS: I think it's just the difference in the way that our financial system in Oregon works compared to the other courts that they've worked with.

QUARTERLY: Was it an older system or just different?

PHILLIPS: Just the way that money is distributed behind the scenes. It is structured in a different way than any court that Tyler's worked with, so we've had to have a lot of discussions in helping them understand how it works in Oregon. So, and those discussions aren't over yet. We spent a reasonable amount of time on that.

SELLS: For me, one of the things that I didn't expect to think about was the file and serve side. Everything that we're talking about we also have to think about, there's the file and serve component of it too, so like we're going through codes, we're going through documents, and then question, is that going to be a file and serve document, so you have to stop and think that through as well. So that was a real learning experience.

QUARTERLY: What was the most difficult part of the OJIN system and all of the other things you had to work on? What was the most difficult component that you had to work on and why?

PHILLIPS: The financial component.

HAINES: I would agree, financial is going to be, it's a big change, its going to be a big learning curve and, yeah, different.

QUARTERLY: Will it change for our financial division as well as court staff then? Will they create new processes...

PHILLIPS: I think we don't completely know the answer to that yet. As we work through business processes in late January to early February then I think that will become more clear, but right now we're still in the process of defining that.

HAINES: Right, I think part of the goal definitely is to look at some of those processes and try to figure out where improvements can be made.

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"...the person-based, statewide system that we'll have in Odyssey...that's really going to help support our judges and our staff find information and make decisions based on the information that you have at hand. They're going to have access to much better information and more of it. It's going to be a big improvement I think."

Ellen Haines

SELLS: I think, more simply, for a lot of people it's been difficult to grasp a concept that we have documents available to us. We add events, we take in things, and the document is available to anybody looking. So it's right there. We're used to noting everything, because we have to be able to look for it later in the case register and now the document is available. For a lot of people that has been a hard concept to think through.

ERICKSON: Look at the conversation we've had in the last few days, we do this and then we won't have to put all these comments in. It's kind of fun, like, "Oh yeah, we are going to have that."

QUARTERLY: In what ways will the changes to the system change OJD?

PHILLIPS: I think our processes will be much more efficient simply by the nature of the fact that documents are immediately available as soon as they're in our system and any number of people can access them at the same time. Running down the literal paper file will no longer be the case so that, in and of itself, is going to be a significant change. Just more efficient business practices I think is what will be really evident to people once we get past training, and you know, people get comfortable with the system and used to the differences..

ERICKSON: Workflow, community partners...

PHILLIPS: ...Yes, well, and for the Bar, just having 24-hour access to the system is going to be huge and, you know for court staff that is going to have a significant impact because attorneys aren't necessarily going to have to come in on our schedule. They're going to be able to file things when it works for them.

QUARTERLY: So do you think we're going to have more incoming activity, with more outside access?

PHILLIPS: I think more people will choose to use the file and serve option because it's convenient for them. If they didn't make it in to the court before five o'clock they still can get things in before midnight, you know, maybe they're still working on something that needs to be filed. So I think it will even out the number of people coming into the courthouse. I think our number of filings are just simply driven by the number of crimes committed or not, or of lawsuits filed. I don't think the [new] system will have a bearing on that part of it, but I think it will make things more efficient. Attorneys can sit down in the comfort of their own home, or the comfort of their office and file when it's convenient for them. They're not going to be rushing in at ten minutes until five for those last five filings they need to get in before five o'clock. They're going to do it from their office at seven o'clock in the evening instead, and I think that's going to be huge in terms of people seeing a positive impact.

HAINES: I think we'll see a real shift in how we do the work that we do in the courts. So instead of digging through piles of papers and having to hole punch those papers and put them into file folders, we're going to have electronic document images in queues that are going to be processed and with a click of your mouse imported into a case. As opposed to all of that manual shuffling of paper. It's going to be a shift in how we do what we do but I don't think it's going to change necessarily, the substance of what we do, it's just going to be a new way of doing things.

QUARTERLY: We're talking about how it's going to free staff up for other things that need attention, other customer service areas, are you looking at that now, looking towards that?

PHILLIPS: I think it's going to free staff up to be able to pay closer attention to what they are doing

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"...and the way Odyssey works with different tabs, you're not putting everything in one little area - in OJIN everything goes in the same screen, and you have to go through everything to get where you want to go. In Odyssey there are different tabs, so if you want to look at hearings you go to the hearings tab, if you want to look at a warrant you look at the warrants tab, a disposition you go to the disposition tab..."

Angie Erickson

and to give it the time that it deserves. Because right now in our current system, OJIN is completely maxed out and there are things that OJIN can't do efficiently. And I think because staff are not going to be sifting through those stacks of paper (instead everything is going to be in a queue right in front of them) they are going to be able to take the time to process it. As a result, I would think that there would be less mistakes and people would just feel a little bit less stressed and pressured.

SELLS: I think the focus of jobs will change.

PHILLIPS: Definitely, yeah.

SELLS: So instead of filing clerks filing paper they will maybe be scanning or helping at the customer service counter, I mean potentially helping people with file and serve questions. I have no idea how it will eventually end up, but I think the way we do our jobs will change.

HAINES: I think one other place where it's going to be significant is for self-represented filers. We want to have online, interactive forms for self-represented filers. Right now we have staff who spend a lot of time trying to help people fill out hardcopy forms correctly, they can't give legal advice or anything like that, but help with the basics of how to legibly fill in the blanks on the form. I think the process for self-represented litigants is going to be so much more streamlined if they are able to use online access and have assistance online filling out those forms. It's going to be a big improvement for our staff and they'll be able to spend time working with people on more complex issues rather than having to deal with just how to fill in the blanks on the forms and that sort of thing.

ERICKSON:...step by step.

QUARTERLY: Which will be more people oriented...helping people.

PHILLIPS: Right, and then you can spend the extra time with the person who would have even a difficult time getting through the process even with online forms.

HAINES: The other thing to that just popped into my mind is the person-based, statewide system that we'll have in Odyssey and how that's really going to help support our judges and our staff find information and make decisions based on the information that you have at hand. They're going to have access to much better information and more of it. It's going to be a big improvement I think.

SELLS: Which might also help us collect more of our revenue owed because we have better information.

PHILLIPS: And right now, in our current system (that's not person-based), a judge can inadvertently do an order that is in direct conflict with a case that they don't know about, so it will certainly help judges to make more informed decisions on the bench because they're looking at the person and not just the case in front of them.

ERICKSON: Especially in the bigger...in the counties up here, where so many county lines get crossed.

HAINES: Yes, right.

ERICKSON: In Klamath we don't even worry about that.

[Laughter]

QUARTERLY: We've been talking about what you've achieved for OJD where there will be so many positive changes... but what did you achieve for Odyssey?

ERICKSON: eNotices!

[All agreeing]

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"...we [currently] have a million codes, because every court said, "We need a court code that says exactly this" ...the Configuration Team has shown (I might call it the maturity of OJD) how OJD has matured. No one is completely wedded to their own practice, we're all amenable to listening to the others to say, "Oh you do it that way." Cooperating and collaborating to come to some agreement..."

Andy Sells

ERICKSON: That's a special development that they've [Odyssey] had to do for our courts and I think our UCJs...

PHILLIPS: ...Yes, the judgments. The judgment portion of the program, for them, is a whole new..

ERICKSON: ...concept.

PHILLIPS: Yeah, concept.

QUARTERLY: What needs to be developed for those two areas?

ERICKSON: They don't have the concept of creating a sentence order live, and so they are having to create the components to replicate what your UCJ does for us, what GUI has done for us.

HAINES: I think the other piece of that came from what we use with those courts that are up on OnBase. They have the capability for a judge to actually sign the documents electronically so you're printing out a completed, signed judgment to hand to the parties on the case right there in the court room. So that's another piece that's in development for Odyssey, but the notices are the other big piece. The ability to email notices to case parties is a new component for Odyssey that they're adding just for us. Though I'm sure there are going to be other courts that are happy about that as well.

SELLS: Oh yeah...of course!

[All Agreeing and Laughter]

QUARTERLY: OJIN had its way of us getting to the information, it's organized in a certain way, which may or may not be logical. Was there any restructuring of the information and processes from our old system into the new Odyssey system that's going to affect the way we do our jobs, and the way we put information in, or take information out?

PHILLIPS: We certainly spent a lot of time taking a look at specific codes, like the event codes and hearing codes, and tried to really ask ourselves

how can we streamline and make sure we don't have a bunch of codes out there that are duplicate codes or that really don't describe what we're trying to get at. I think people will reap the benefits of us having really taken a lot of time to look at that and discuss it. We'll discuss it even further when we start talking about business processes to make sure that we have everything in there that we need. That is something that I think people will really notice: we took out things that were duplicates in the system. People didn't even realize there were duplicates, so they're going through this big old list trying to figure out which code they're going to use. We tried to make those lists smaller, so that it's more user friendly.

ERICKSON:...and the way Odyssey works with different tabs, you're not putting everything in one little area - in OJIN everything goes in the same screen. You know, you're looking at everything at once and you have to go through everything to get where you want to go. In Odyssey there are different tabs, so if you want to look at hearings you go to the hearings tab, if you want to look at a warrant you look at the warrants tab, a disposition you go to the disposition tab...

PHILLIPS: Yeah, or one thing that will be really big for those folks that process civil cases is, if you want to look at service information.

SELLS: ...the service tab!

PHILLIPS: ...yes, you go to the service tab, instead of having to read through the whole register of actions, and figure out what service goes to what thing in the case. The tabs will make a huge difference for people.

[All agreeing]

SELLS: I think that service on the civil cases is one of the biggest enlightening improvements that we're going to see. It's amazing.

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HAINES: I'd say just yes and no for your question. There are some things that are going to be very different, just the shift from a case-based system into a person-based system is a big change, but also, I've been surprised by how much sort of synchronicity there is between the Odyssey system and the OJIN system. We can take certain code tables from OJIN and say, "Yeah, ok, this fits into this code table in Odyssey," and we just plug it right in. We have taken a good look at a lot of these codes and have streamlined things, but we can still use those same codes in Odyssey that we've been using in OJIN all this time. The concept is there, it's the same - you have a two to four letter code. If you've been working with those codes in OJIN for twenty years, when we switch over to Odyssey those same codes are going to work and are going to be there. You can add events using those same codes, so I thought that was a really positive thing, and for me a surprising piece of this learning process was, "Oh! we get to keep our codes from OJIN." So that will really help although the format and a lot of other things are big changes, some things are still the same so it's an interesting mix.

ERICKSON: The conversion will be easier.

PHILLIPS: Yeah, I think so.

ERICKSON: An easier transition for people than having to relearn everything.

[All agreeing]

QUARTERLY: So the codes are now more streamlined and it's a cleaner process?

PHILLIPS: Yeah, as Ellen [Haines] said, it'll be a familiar process for people to a certain extent because we are trying to use the same codes as often as we can and things did transfer over quite nicely to the Odyssey system.

QUARTERLY: Were any of you involved in the implementation of OJIN?

SELLS: Yes, I was. Way back.

QUARTERLY: Compared to the implementation of that system and maybe other systems that you may have been involved in, what value did the Config Team's participation in this process bring to this implementation?

SELLS: Well, in 1987, the world was different, and so we were typing on cards, and we were writing in books the case register of actions, and nobody had a computer sitting on their desk. So the world was different, but, we weren't involved in the development of OJIN. OJIN "came to a local court near you," and people brought in great big

computers and put them on our desks and said, "Ok, this is how you're going to keep your case register." There was a minutia of training that went along with that. And I mean, minutia. We learned from each other, trying things, going, "Oh, did you see that?" This [Odyssey] is completely different. The Configuration Team, the Odyssey implementation, the background, and the development is so different than that. And so, I'm ever so much more hopeful about its success.

PHILLIPS: It's just been a real team effort...

SELLS: It's been a real team effort and I think it shows. Back then the courts were isolated. OJIN went in to every court and said, "We're going to do this, and we're going to use this code." That's why we have a million codes, because every court said, "We need a court code that says exactly this." But I think the Configuration Team has shown, and this has been amazing to me, (I might call it the maturity of OJD) how OJD has matured. No one is completely wedded to their own practice, we're all amenable to listening to the others to say, "Oh you do it that way." Cooperating and collaborating to come to some agreement, and it's going to mean some changes for everybody but we basically agree that we do the same things and we get the same result, we just do it a little bit differently. That's really a difference. In every court way back then, someone came in and said, "Here's your computer, here's how you turn it on, here's how you use it, and you keep your case register this way." "Oh, ok..."

[Laughter]

SELLS:...and then we all learned from each other, it was amazing.

ERICKSON: But you guys are talking about OnBase too, just the information, you know, going from green screen to GUI and then the people that knew OnBase, transitioning to Odyssey. The people that had the OnBase experience just added so much more to the [configuration] conversations because they understand that shift.

PHILLIPS: Right, that's true.

SELLS: Well and, you have experience with how that developed and what you don't want to repeat in development of the new system so...

ERICKSON: ...yes, lessons learned.

SELLS: ...lessons learned!

QUARTERLY: Then it is a big change because before we were...I'll use the term siloed... with the

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"...another value that has come out of being part of the Config Team is just recognizing if you're not the pilot court, or even an early adopter, what you need to do to get ready before it comes to your court...documenting your processes and knowing how it's going to work in Odyssey ...helping people do some of that change ahead of time."

Carmen Phillips

separate courts. It was like we had separate systems, but now its going to be a statewide system and its great that you're able to collaborate and share all of that information. Did you find that each court had something that contributed to this configuration of the components that all the courts will be using?

PHILLIPS: Just the amount of experience in the room, and as Andy [Sells] was saying, everybody's willingness to listen and learn about how it's happening statewide. Sometimes there were several different ways to do things [processes and different codes]. But you know, just really talking about the business need and getting to a place where we could make decisions, not cut each other off, and really listen to each other - that was valuable. Because the fact is, that everybody is going to be in that boat when they have it [Odyssey] in their court. We all will have to realize that when we're working in a person-based system, there is great value in discussing these things ahead of time. Recognizing that we are all doing things slightly differently right now, and trying to make the person-based system more consistent is going to benefit all of us.

HAINES: I know I have taken some notes just from these meetings back to our court to say, "We can change this process now, you don't have to do it like that anymore," based on what somebody at another court said. "You're like, "Oh, let's change that, let's stop doing that. If we don't have to do these extra steps, let's change our process now." We're learning just from the other folks on the Config Team about improvements that we can make even before we move into Odyssey.

PHILLIPS: And I think that's another value that has come out of being part of the Config Team is just recognizing if you're not the pilot court, or even an early adopter, what you need to do to get

ready before it comes to your court. You know, documenting your processes and knowing how it's going to work in Odyssey and helping people do some of that change ahead of time. That's been a huge value that I didn't really anticipate going into this. I was like, "Ok, we're going to be working with Tyler and figuring all this out," and now it's like, "Oh, it's given me this great insight on how to get prepared for that before it's in our court literally."

QUARTERLY: So, this is a deep question, what did you learn?

[Laughter]

ERICKSON: All of the things we just talked about.

HAINES: All of them and then some.

QUARTERLY: Have your opinions changed about technology through this experience of going through the configuration process?

PHILLIPS: I don't know if my opinions have changed about technology, obviously having this in the forefront of my mind for such a long period of time, I feel much more comfortable about the idea of using something new in our court. I feel confident that I'll be able to help people learn the program and help them make their way through the changes related to that. So I don't know if my opinions about technology have changed, I think I came into this excited about the project and still feel maybe even more excited about the project because I have a lot of confidence in what we're getting in terms of the results of our work. I look forward to reaping the benefits of that and feel that if anything changed in any way, I'm more optimistic about it even more so than when I came in.

ERICKSON: Exactly. And the opportunity for the community partners - hopefully the Bar will

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be integrated with us and they'll be updating their own statuses and people, and we'll possibly be integrating with the Sheriff's department, and the jails, and all the different things that Odyssey does in other states and other counties. They have that collaboration of partners. I don't know, it's like they've got all those different components, and we're like, "Why would you have that?" Like the service component - part of their service component is that you can direct who's going to serve it and what method they're going to use to serve it, which for us is a concept that's not for us, but you know sometime in the future maybe it is.

PHILLIPS: Yeah, there's a lot of room for growth in addition to what we intend to do going forward.

QUARTERLY: What would you say to staff that are still anticipating this change, and I know you've gone back to your courts and shared info, but there are still people out there who are busy with their jobs and don't want to think about it until it happens. So what would you say to them to get them as excited as you are - having gone through this process and worked with Odyssey yourselves and configuring everything that's going to be part of the system?

SELLS: One thing, I guess this might be going a little far but, there've been a lot of presentations to the TCAs and the judges, the staff really need to see this. We can go back and we can talk about it, but the staff needs to see this.

[All agreeing]

HAINES: I agree. The folks I work with every day using our business processes, and using their expertise in whatever case types they work on - if I bring them into my office and we sit down and look at Odyssey to compare it with the processes that they do in OJIN now, they walk away really excited about the Odyssey product. So yeah, I think that that would be a huge help to start showing the staff so they can see what it looks like so that it's not a big black hole, scary question mark, or unknown entity. Having a chance to see it and even just to see what it looks like I think, really helps ease peoples' minds a little bit and gets people excited.

SELLS: It gets people excited. That's what I mean, anyone I've shown it to gets excited about how it really works. I just want them to start seeing it because the judges have seen it, the TCAs have seen it, and for some of us [courts] who are way down the line, it's going to be a long time before it

comes, so keeping interest is really not easy. There's been a lot of information put out about the progress of it but that still isn't real. It's not real.

PHILLIPS: People want to know what it's going to be like for them on a day-to-day basis and so when they can actually see what they're going to be working with, then they're more comfortable with the fact that its coming to a court near them soon.

HAINES: The one thing that I like to show people when I do have people in my office is case history, which is a link in Odyssey that allows you to see a list of the last twenty cases that you've worked on. So you can always get back to the cases you've most recently been working on. A little thing like that is a huge improvement if you're working on something and you get interrupted by a phone call. Right now in OJIN if you switch over and pull up another case...

SELLS: ...it's gone!

HAINES: ...Right, that case you were just working on is gone. In Odyssey, they've got a lot of little details like that where they've clearly really thought out how they're designing this system...little features like that that just make your day-to-day life so much better...

ERICKSON: ...and the fun stuff, flags and, well the flags. Those are fun things to have.

SELLS: And to show how the relationships of people, like OJIN's limitations of attorneys and you can actually, if you have a civil case that's complicated, say it has several attorneys who are going to be filing documents, you can put those attorneys there and you can show all of them. The things that you can do, every time you get the chance to show someone how it works, they do get excited.

ERICKSON: I like the hearings tab. Joe Smith calls in says, "Yeah I think that I have court." You can look him up and say, "Well yeah you do, but it's in Multnomah County."

HAINES: Right, yeah. If you look a person up you can see all the hearings for that person in the entire state.

QUARTERLY: What do the flags do that you were talking about?

ERICKSON: You can flag a case that...

HAINES: ...there's lots of different ways you can use them...

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*"...in our current system (that's **not** person-based), a judge can inadvertently do an order that is in direct conflict with a case that they don't know about, so it will certainly help judges to make more informed decisions on the bench because they're looking at the person and not just the case in front of them."*

Carmen Phillips

ERICKSON: ...maybe they've got a bounced check they need to clear out, or we need a new address, or they've requested an accommodation...

HAINES: If there's a fee deferral on that case, you can put a flag on a case that shows that the fees have been deferred. There are all sorts of different ways we can use those and I think we will probably get more into that with our business process stuff. But you can pretty much do whatever you want with them.

ERICKSON: You can have it be red and flashing...

[Laughter]

QUARTERLY: Alarms going off?

HAINES: Yes! I think they said you could have a sound.

SELLS: I think so too.

QUARTERLY: Back to the [Odyssey] presentations....when they bring them to the courts for staff, how would that happen logistically?

PHILLIPS: In our court we'd probably offer a couple different sessions to ensure there's coverage and make sure everyone has an opportunity to go.

HAINES: It's going to depend on the size of the court. I think it's going to be very different in Multnomah, you just set up multiple sessions throughout the day and supervisors will arrange for people to attend and make sure they have everything covered. But in smaller courts you can't really do that so well.

QUARTERLY: Maybe during the lunch hour?

HAINES: Yes, lunch hour...or early in the day.

ERICKSON: For us, we're closed from 8 am-9 am on Fridays now, we could do it then.

SELLS: That would be exciting though...

QUARTERLY: Is there anything else that you want to communicate about the configuration process, the team effort, or anything else about Odyssey, about Tyler?

HAINES: The only thing that I would add is just that working with Tyler has been... I've been really impressed with everybody from their team, also with their product. I've seen the PowerPoint presentation that has been shown to TCAs and the Bar Association and one of the things that they talk about in there, is their track record. You know, I mean, they have a 100% implementation success rate with the Odyssey product. That's really impressive and when you work with the folks from Tyler and you see the Odyssey product, you believe it! You understand that they are familiar with court processes and that they have implemented this system in so many places before, they really haven't been surprised by any of the court procedure kind of stuff that we've shown them. They've worked with larger courts, smaller courts, everything in between. Its been, well, I have a lot of hope!

HAINES: I have a lot of confidence in the folks from Tyler. They really seem to know what they're doing and it's been great working with them.

PHILLIPS: I was just impressed right off with their knowledge of courts, and they could just come in speaking our language. Certainly there was, in the beginning, a little bit of making sure we understood their terminology and making sure that they understood our terminology, but they always did a really great job of ensuring that. They always asked questions if there was something that wasn't clear. I've never seen a situation [with Tyler] where they've taken us to task on why we do what we do.

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Instead, they were really there to learn from us. They could go back and make sure they were meeting the needs of the customer and I certainly know that isn't always true. It hasn't been true in the past with some other companies. So that's been really impressive, and it's really clear that their employees are very committed to this process and committed to ensuring that we're happy with the product that we're going to be using for the foreseeable future. So that was surprising to me because you don't know how much knowledge they're going to have coming into it and every person that we've interacted with has just been incredibly knowledgeable - very committed. They listened well, they communicate well.

SELLS: And that makes it easier, because one of the Guiding Principles is to pay attention to Tyler's recommendations. We're going to take them [the recommendations] and we have confidence in them. Tyler has been really good to focus our attention, but never said we were doing it wrong. They've said, "We won't be doing that," and that's ok because we now know that we can trust what they've done.

PHILLIPS: And we've also learned from their other implementations. If we're sort of struggling with how we might handle something in Odyssey they're really good about saying, "Here are some different situations we've seen, maybe one of these situations will work for you..." and they have.

ERICKSON: The service tab is a great example. When we first saw it, it was like, "That is not something that we're ever going to use. That's not what we do." And then, what, nine weeks later it's like, "We need that!"

[Laughter]

SELLS: "This is what we want to do!"

ERICKSON: ..."Here, let me show you that again. That's awesome!"

SELLS: That is the perfect example.

[All Agreeing]

ERICKSON: But they [Tyler] didn't tell us at the time, "This is what you need but you just don't know it."

QUARTERLY: Anything else about your Config Team experience?

ERICKSON: It's been fun, it's been good.

PHILLIPS: It's been good. It's been very good.

ERICKSON: Just getting to know people from other courts and like Ellen [Haines] was saying, the way things are done here and there, you can learn from the different processes and just the vast amount of information that everybody in that room has. Everybody has information. Somebody talks about probate and we all look at one person, somebody talks about financial, we look at certain other people...

PHILLIPS: And then, a side benefit is that when you have a question come up in your court, you can say, "I met this person at Configuration that has this knowledge and so now I know who to contact in that court to talk it through." So, that's been good.

SELLS: That's already proven helpful.

[All Agreeing]

QUARTERLY: You've said that in the future, you'll probably be participating in things related to Odyssey but you don't know what you'll be participating in yet. Have you had any thoughts, discussions, or ideas about maybe as subject matter experts (SMEs), playing that role in some way?

PHILLIPS: We've talked. As they've said all along there is a possibility that they will be trying to pull from the group when there is help needed, so we're all aware that that could happen. We just don't know. All of it's unknown until we get there and start rolling this out in courts - what's really going to be needed.

QUARTERLY: Last question, How does Odyssey rock? [referring to the Config Team slogan: "Odyssey Rocks"]

[Laughter]

PHILLIPS: In every way.

ERICKSON: You should say, "How does the Config Team rock?"

[All agreeing]

Video Demonstrations on Odyssey

Four videos demonstrating the use of Odyssey are available for viewing by all staff, TCAs, and judges. LIT representatives for your court have the details. Go here to find your LIT representative:

[LIT Team List](#)



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Codes Workshop - seated l to r: Greg Byler; Michael Johnsey; Angie Erickson - standing l to r: Norma Alexander; Rudy Ordonez; Eric Hall; Robin Huntting; Ellen Haines; Heather Barrance; Pam Barton; Kathy Nicol; Gene Berg; Jeanette Schehen; Andy Sells; Debbie Little; Amy Fairall; Karla Fry; Carmen Phillips; William Jennings - not pictured: Christie Combs; Tammy Dover; Ed Jones; Julie Traverse; Liza Webb, & Kathy Ziegler

“Hundreds of Crucial Configuration Decisions”

By Gene Berg, Oregon eCourt Configuration Manager

During the week of January 9, 2012, the Oregon eCourt Configuration Team completed work to finalize the initial configuration of Odyssey in preparation for the Oregon Judicial Department’s (OJD’s) first implementation in Yamhill County. The team members, made up of 20 individuals (TCAs, line staff, supervisors, and analysts) from 13 courts (Clackamas, Clatsop, Deschutes, Jackson, Jefferson, Lake, Lane, Linn, Malheur, Marion, Multnomah, Washington, and Yamhill), augmented by staff from BFSD, ETSD, and OETO, have spent more than 350 hours in training, analysis, and configuration work. The team was charged with the task of configuring the Tyler Technology “Odyssey” system to carry out the statutory and legal requirements of OJD and the Oregon eCourt vision. Configuration and Design is a standard part of all Odyssey rollouts as Odyssey must be configured to meet state, county, or municipal statutes, sentencing, statistical reporting, and business needs.

Configuration Team work began in February 2011, when Tyler Technologies conducted a series of Fit Assessment sessions with OJD TCAs, supervisors, and line staff to identify any gaps between OJD’s business needs, the 1,969 requirements in the

Request For Proposal (RFP), and Tyler’s Software Solutions. The Fit Assessments were conducted under the Oregon eCourt Program’s Guiding Principles, which were created to ensure all that Fit Assessment and Configuration participants were aware that our program Executive Sponsors and Governance have set the goal to minimize scope and only allow additional development work “to occur if required by the law.”

Following is a summary of the Fit Assessment and other work done by the Oregon eCourt Configuration Team:

1. Fit Assessment Scenarios – In early February 2011, team members received a set of diagrams and detailed narratives that covered 51 as-is court processes to review and provide feedback on by pointing out if the process had changed or omitted areas. Team members then participated in a webinar in late February to discuss and provide feedback on their findings.
2. Odyssey Product Overview – In early March 2011, Tyler provided a two-day overview to the team and OJD staff who would participate in

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the Fit Assessment. The purpose of the overview was to show participants how Odyssey works, components of the system, how they are integrated, and how information is entered and retrieved.

3. Fit Assessment – OJD staff from the courts, ETSD, BFS, OETO, and SCA office spent three weeks participating in a review of the Odyssey product and business case scenarios to determine where gaps in essential functionality may exist, and which would need to be addressed to meet OJD’s defined requirements. The assessment covered all case types, eFiling, ePayments, financial processing, calendaring/scheduling, imaging/document processing and Multnomah specific processes.
4. At the end of the Fit Assessments, 183 RFP requirements were dropped either because they were deemed not absolutely necessary or because the requirement was eliminated by how Odyssey business processes work. Only five new requirements were added. The added requirements were based on the RFP requirement of “no net loss of functionality,” and the fact that they will contribute a great deal to court efficiency. The Oregon eCourt Steering Committee subsequently reviewed and recommended approval of these new requirements to the Oregon eCourt Sponsors.

The Oregon eCourt Configuration Team has truly done an outstanding job. The group works well together and members feel free to have open discussions - even when there are significant differences of opinion. The expertise of the team, along with the breadth and depth of knowledge has amazed team members. Within the Guiding Principles provided by the Oregon eCourt Executive Sponsors, and through careful analysis, open discussion, mutual respect, and consensus, the team has made hundreds of crucial decisions for configuration of the Odyssey system. The Team has also escalated several (policy level) decisions to the Oregon eCourt Executive Leadership Team. In all, the Configuration Team reviewed and analyzed every code in OJIN (more than 1800 codes). In their analysis, they determined how the code may function in Odyssey, and whether the code is even necessary in Odyssey, given that the new system provides a more thorough and efficient way of viewing and processing information.

At the end of January 2012 the team began work on business process design which includes documenting and verifying current OJD business processes against Odyssey system configuration; configuring the development work to meet OJD requirements; then defining and again verifying the business processes. Business process design and configuration work for the team is scheduled for completion in mid-March 2012. ■

Timeline of Configuration Activities

6/20/2011	Team completed Odyssey System Overview/Training	(30 hours)
7/11/2011	Team completed Odyssey Case Manager & Calendaring Training	(30 hours)
7/18/2011	Team conducted Odyssey Case Manager & Calendaring Configuration	(30 hours)
8/2/2011	Team completed 20 hours Training on Odyssey Financial Manager	(20 hours)
8/15/2011	Team conducted Odyssey Financial Manager Configuration	(30 hours)
8/29/2011	Team completed User Security Rights & Roles Training & Configuration	(30 hours)
8/1-9/12/2011	Sub Teams conducted Design/Development Reviews	(18 hours)
9/12/2011	Team Conducted Design/Development Reviews	(30 hours)
9/19/2011	Design/Development Reviews	(20 hours)
10/4/2011	eFile (File & Serve) Configuration	(20 hours)
10/10/2011	Odyssey Forms Configuration/Workshop	(30 hours)
10/31/2011	Odyssey Document Management Configuration	(30 hours)
11/7 - 12/20/2011	Team members use Odyssey to verify configuration, report their findings, and meet weekly in Post Configuration Conference Calls. This process will add another 29 hours of meetings and most Team Members are working nearly full time on the verification of the initial configuration.	(29 hours)
1/9/2012	Team participates in Code Workshop to finalize codes	(30 hours)

Timeline of the Remaining Tasks of the Team for 2012

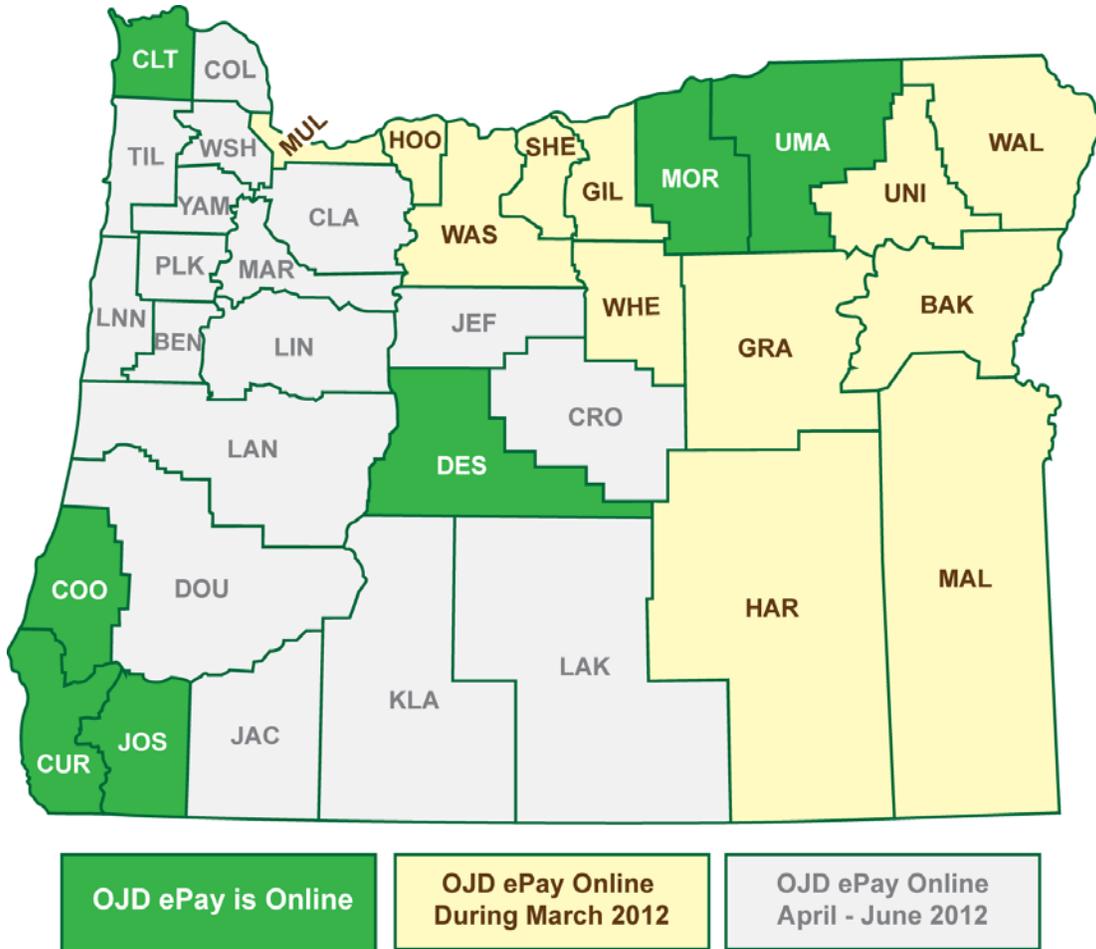
1/30/2012	Business Process Design Workshop to map out, document, verify processes	(30 hours)
2/6/2012	Continued Business Process Design Workshop	(30 hours)
2/27/2012	Configuration Verification Workshop to verify and document business processes against system configuration, rights, and roles	(30 hours)
03/05-09/2012	Configuration of the development work to meet requirements	
03/12-16/2012	Business Process workshop to define and verify processes	
4/2 - 5/18/2012	Some Team members participate in UAT Testing of configured Odyssey Product	
Ongoing	Review feedback from pilot court and early adopter courts	



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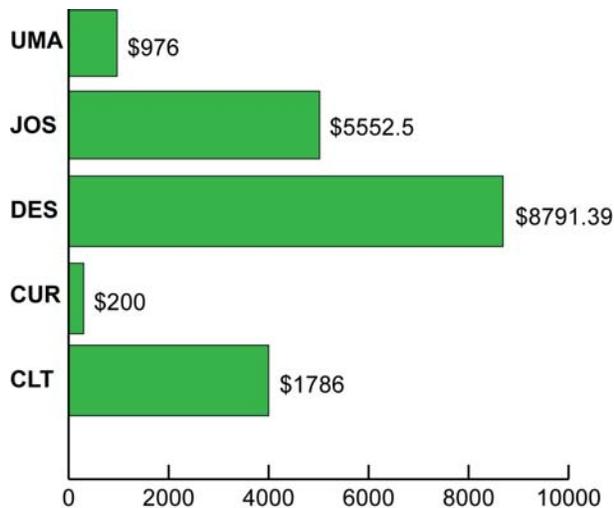
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OJD ePay Implementations Gaining Momentum



ePay Revenue Statistics

as of 2-24-12 in Circuit Courts with ePay Service:



ePay Homepage Visitor Statistics

as of 2-24-12:

Unique Views of the ePay Homepage **1,104**

since 11-14-11:

Searches Using ePay Tool **1,578**

Please email your comments, questions, or suggestions for articles to: OETO@ojd.state.or.us

Oregon eCourt will give courts and judges the tools they need to provide just, prompt, and safe resolution of civil disputes; to improve public safety and the quality of life in our communities; and to improve the lives of children and families in crisis.