PN-ACL-346

CMA Testing Group Training for NCC Staff:
Trainers' Guide
Intercom
Contract No. 263-C-00-95-00134-00
Administration of Justice Support Project
AMIDEAST/ AOJS Cairo
June 2000

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Received 05.30.00
II-II-3.5.38 b

AOJS CASE MANAGEMENT APPLICATION: DATA ENTRY TRAINING PROGRAM FOR THE MINISTRY OF JUSTICE NORTH CAIRO COURT

TRAINER'S GUIDE

Funded by the
United States Agency of International
Development
(USAID)

Administered by the
Institute of International Education
Development Training 2 project
(IIE/DT2)

May 20, 2000

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INTRODUCTION TO THE TRAINER'S GUIDE

1. Program Title Case Management Application (CMA). Data Entry

2. Recipient Work Unit(s) The North Cairo Court (NCC). under the Ministry of Justice

3. Background to the Training Program

Currently, case management and administration in Egyptian courts depends on manual data management procedures Data about court cases is entered manually. Access to case-related data is slow, and the data available is not always accurate. Documents, and sometimes whole case files, are misplaced. This slows down the system of court administration, and causes delays in courts This also makes it difficult to rely on available data in managing cases, and in reporting.

One of the main focuses of the Administration of Justice Support (AOJS) Project, under USAID/Egypt's Special Objective C: Improved Civil Legal System, is to improve the administration of justice through improving court-specific administrative functions

To this end, AOJS has sub-contracted Intercom as a software development supplier to produce an arabized version of the Case Management Application (CMA) software previously developed by the AOJS Project The software is a customized Arabic language application for Egyptian courts. It constitutes a series of databases in Lotus Notes The CMA is an integrated computer application running on a local area network of personal computers, printers and servers. The system will be used by circuit clerks to input case, event and litigant/party data, as well as attorney and representative data, and to output information for case management purposes.

The CMA displays information about court cases in user-friendly forms The application is comprised of case, event and litigant/party forms, as well as attorney/representative forms These forms are linked together into an integrated case document or file from which all information about a particular case, the litigants and the case events are displayed and updated.

The case document contains information about a particular case, as follows: what type of case it is, what it is called, what the case is about, where and when it was commenced, which panel is responsible for it, and the location of the paper file/hard copies of documents Also included is information about who the litigants are, their addresses and contact information, and litigant attorney information Most important to the CMA system is case event information For the purposes of the CMA, an event is something that happens in a case, such as a document having been filed, panel decisions having been taken, requests for expert opinions, judgements, service orders, hearings, postponements .. etc. Every event in the case document or file is either a past event or a pending event that is expected to take place Users of the CMA thus see, at a glance, the status of the case, what has happened with a particular case thus far, and what is expected to happen next. The CMA also enables users to notify each other of pending or scheduled events through a basic mailing system

Circuit clerks will enter case data into the system Thereafter the CMA will be used to update event forms according to actions taken during hearings or in preparation for hearings

The CMA will thus provide case data to panel judges and follow-up judges for them to be able to manage case and litigant actions The use of the CMA is therefore expected to make a major contribution to improving the reliability and accessibility of case-related data, and improving case management and turnaround

4. Target Audience/Description of Participants:

The following table outlines the categories of participants for the CMA Data Entry training program·

Category of Court Staff/Participants	Main Responsibilities at the Target Work Unit
NCC Front Office Staff (Indexing Department)	Responsible for initiating new cases and entering preliminary case data (type, number, circuit, party names).
NCC Information Desk Personnel and Supervisors	Responsible for responding to queries about cases from the public, or from party representatives/attorneys.
Data Entry Staff at the Computer Unit	As per current court reengineering efforts, this staff will be required to enter case data related to old pending or closed cases. They will also enter representative/attorney data.
Data Entry Staff at the NCC Library	Similarly, this staff will be required to enter case data related to old/pending or closed cases, as well as representative/attorney data.
Circuit Clerks	Responsible for particular circuits and case types. They will enter all case data and follow up on case events/ developments once they receive the new cases from the Front Office.
Chief Clerks	Responsible for overseeing the work of circuit clerks and the case files/data they maintain.
Legal Order Clerks	Responsible for initiating and entering data for legal orders that are sometimes resolved without being filed as a case, or that sometimes get re-filed as cases.
Supervisors and Department Heads	Responsible for overseeing various court administration functions, such as case follow-up for different types of civil cases, case statistics for reporting purposes, complaints and investigations . . .etc.
Case Statistics Staff	Responsible for compiling and analyzing case statistics for reporting purposes.

Table (i): Categories of Court Staff and Work Unit Responsibilities

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The above types of court staff have specific responsibilities with regard to case data entry and administration that necessitate their receiving training on data entry, retrieval and administration operations They will thus all have Level 1 or Level 2 data access rules in the CMA. These data access rules, and their corresponding technical operations will be the core of the CMA Data Entry training program. The participants will be expected to perform the following technical operations

- Creating new case documents and storing them in the CMA Case Database,
- Viewing case documents and database views,
- Accessing case, party and event documents from the CMA Case Database;
- Editing case-related documents (with particular data access restrictions),
- Printing case-related documents and case labels,
- Viewing details and statistical information under different case and event views in the CMA Case Database;
- Creating representative/attorney forms and data in the CMA Representative Database,
- Accessing representative/attorney data from the CMA Representative Database and linking it to case and party documents in the CMA Case Database,
- Editing and saving representative/attorney data, and
- Searching for documents and data in the CMA Case and Representative Database

The target participants of the CMA Data Entry training program will not have access to the following technical operations and data.

- Changing case numbers and types, and circuit numbers in case documents,
- Transferring case-related documents from one case to the other;
- Assigning/changing data access levels and control rules to different CMA users,
- Creating and editing keywords
- CMA keyword views;
- Court management views (with the exception of one view categorizing closed cases) and
- The CMA Administration/Log database (only accessible to CMA administrators and technical support staff).

The target participants' current performance with regard to recording and maintaining case data and case files is characterized by the following:

- a generally limited degree of accuracy/reliability of case-related data entered manually;
- slow access to case-related data/documents.
- misplaced case-related documents, and sometimes whole case files
- inconsistency of data across case files and within the one case file,
- duplication of data and documents within and across case files,
- potential loss of data, and

- slow turnaround time on requests for data case documents and statistics for monitoring case progress

With regard to the current computer proficiency of the target participants. it is worth noting that most of them have very limited experience in utilizing computers, even at the level of word processing. Their typing speed in Arabic is also quite limited It is expected however. that all the participants will have received basic Windows training prior to the start of the CMA Data Entry training program (per iteration)

In light of the noted limitations in participants' computer literacy, the CMA Data Entry training structure will allow for a slow-paced start and a detailed presentation of basic computer terms and technical operations that the participants will utilize throughout the training. They will also utilize these basic terms and operations for running the CMA databases at their work units.

5. Purpose of the CMA Data Entry Training Program

The following is the main purpose of the CMA Data Entry training program

- To improve work performance at the NCC with specific reference to case-related data entry and maintenance/updating, access to reliable data, and speed of access This, in turn, will lead to improved case administration and management in the target court.

6. Targeted Performance Improvement Results

The following are the targeted performance improvement results for this training program

6 1 Increased access to accurate and reliable case-related data, and
6 2 Increased speed of access to case-related data

The achievement of the targeted results will be measured through the following indicators

- Accuracy of data inputted in the CMA;
- Rate of data retrieval,
- Frequency of updating case events and related data, and
- Number of cases processed through the CMA

The AOJS Project has primary responsibility for following up on these indicators after the training, and evaluating the achievement of performance improvement results and their impact at the NCC

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7. Training Objectives:

An analysis of the participants' current responsibilities and work performance, and their level of computer literacy presented above, vis-a-vis the technical CMA operations they will be expected to perform and the work unit performance improvement results they will contribute to, yields the following training objectives

7.1 Cognitive Learning Objectives

At the end of the training, the participants will have gained mastery over the following cognitive areas:

- understanding the basic terms and components of Lotus Notes databases;
- understanding the constituents of the CMA system;
- understanding the documents and categorization principles of the CMA Case and Representative Databases;
- conceptualizing the document and data links between the CMA Case and Representative Databases;
- understanding the principles of data integrity, maintenance and management,
- understanding the parameters of data access control;
- conceptualizing the respective roles of the different CMA users with regard to case processing and management, and
- understanding the components and organization of the CMA User's Manual as a reference tool.

7.2 Psychomotor Skill-Based Objectives

At the end of the training, the participants will have gained mastery over the following skill areas:

- creating documents and entering data into the CMA databases;
- editing documents and data;
- saving, storing and retrieving documents and data;
- viewing documents and data;
- refreshing documents and views:
- printing case documents, and
- using Lotus electronic mail

7.3 Affective/Attitudinal Objectives

At the end of the training, the participants will have acquired the following positive attitudes

- maintaining data accuracy and integrity,
- responsibility for updating data,
- data ownership and sensitivity, and
- importance of data entry automation in facilitating case management and court administration

The above cognitive (learning/knowledge-based), psychomotor and affective objectives are translated into specific terminal behavioral objectives in section 8 below.

8. Behavioral Objectives

The following table outlines the behavioral objectives underlying the CMA Data Entry training program, and the enabling objectives that constitute the building blocks for achieving the terminal behavior sought.

Behavioral Objectives	Enabling Objectives
At the end of the CMA Data Entry training, the participants will be able to	
8 1 work with Lotus Notes views, documents and form elements, given a Lotus-based database, with a high degree of ease and confidence,	• start Lotus Notes • recognize the Lotus Notes workspace menus, smart icons, database bookmarks and status bar • identify the Lotus Notes database building blocks • open documents and categories in different views • identify basic operations for creating, editing, saving and closing documents • recognize and utilize different field types in database forms: text fields, drop menus and dialogue lists, number fields, calendar fields and rich-text fields • manipulate font characteristics in rich text fields for data emphasis • identify and utilize action buttons, hotspots, sections and embedded views

Behavioral Objectives	Enabling Objectives
8 2 use basic features of Lotus Notes Mail to communicate case events to CMA users, given a pending event or a schedule of events, with a high degree of ease, confidence and accuracy;	• select recipients of mail from the CMA Address Book • send mail • receive mail and recognize old versus new (unread) mail • read mail • reply to mail • forward or delete mail • attach documents to mail
8 3 create case documents using the CMA Case Database, given case-related data, with a high degree of accuracy;	• initiate a case document • enter case details • enter party data (for single-party and multiple-party cases) • transfer data from party documents to case documents • select or enter a case number • confirm, save and close case documents
8 4 view case documents, given different sorting criteria and categories, with a high degree of ease, confidence and competence;	• view cases categorized by case number • view cases categorized by subject • view cases categorized by circuit • view pending/current cases categorized by year filed • view past/closed cases
8 5 edit and update case status in existing case documents, given case number, details and new status, with a high degree of accuracy;	• open and edit an existing case document • open and edit party documents from an existing case • update case status
8 6 print case documents, given completed case details and forms, with a high degree of competence;	• print case labels • convert case documents to print form • print case forms and documents • switch between the non-editable print version and the editable full version of a case document

Behavioral Objectives	Enabling Objectives
8.7 create and confirm events, given case details and event schedules/written notifications, with a high degree of accuracy,	• create an event from a case document • create an event from a view • attach documents to case events • access the full case document from an event document • confirm an event • notify users of an event using Lotus Notes Mail • save and close an event document
8.8 view past and pending events, given different sorting criteria and categories with a high degree of ease, confidence and competence;	• view past events under different sorting criteria • view pending events under different sorting criteria • use event views to monitor case progress
8 9 edit existing event documents, given new event details and status, with a high degree of accuracy;	• open and edit events from the full case document • open and edit events from views • update event status • save changes to event documents
8 10 create and view party/litigant documents, given party data, with a high degree of accuracy,	• create new party forms for a case • transfer attorney/representative data from the CMA Representative Database to party documents • access the full case form from a party document • view party documents categorized by party name or by party ID
8 11 edit existing party documents, given new party data and status, with a high degree of accuracy;	• edit a party document from a full case document • open and edit a party document from views • save changes to party documents • print party documents • refresh case documents to reflect changes made to party documents

Behavioral Objectives	Enabling Objectives
8 12 utilize the CMA Representative database, given attorney/ representative data, with a high degree of ease, accuracy and competence.	• create representative documents • save and close representative documents • view representative documents categorized by name, city/ region/governorate or postcode • edit existing representative documents • use the Representative Database in relationship to party documents for data entry
8 13 conduct search operations in the various CMA databases, given a search item or criterion, with a high degree of ease, accuracy, and speed;	• search for case documents by case number • search for case documents by case subject • search for case documents by circuit number • search for party documents by party name • search for party documents by party ID • search for attorney/representative forms by attorney name • search for attorney/representative forms by attorney ID • search for attorney/representative forms by region/governorate
8 14 address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy; and	• utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA • utilize the User's Manual to address questions and problems with case documents • utilize the User's Manual to address questions and problems with event documents • utilize the User's Manual to address questions and problems with party documents • utilize the User's Manual to address questions and problems with attorney/representative documents

Behavioral Objectives	Enabling Objectives
8 15 identify the functions of the CMA for data management and case administration with a high degree of competence and conviction	• identify the roles and responsibilities of CMA users • briefly describe issues of data access control for different CMA users • explain the importance of data accuracy and integrity • describe the value of the CMA in facilitating and expediting data maintenance, retrieval and management

Table (ii): Behavioral and Enabling Objectives for the CMA Data Entry Training Program

9. Program Outline and Topics

The CMA Data Entry training features a modular structure It consists of two main modules, as follows:

Module 1: Introduction to the CMA (1 training day)

This module introduces the participants to the main objectives and content of the training program and to the main functions of the CMA It familiarizes them with the role of the CMA in facilitating data entry, maintenance and retrieval, and overall case administration The participants outline the current problems with paper-based case administration and processing They then discuss how the data entry and processing operations they will perform using the CMA address these problems and support the work of case managers and judges

Module 2: Data Entry Training (15 training days)

In this module, participants receive basic training in Lotus Notes for CMA operation. Participants are exposed to the different case, event and party forms in the CMA Case Database, and the attorney/representative forms in the Representative Database Participants briefly preview the CMA Databases, then focus on the Case and Representative Databases (the main databases they will utilize at the workplace)

This module provides the participants with training in creating, editing, saving, updating and printing the different forms. and enables them to conceptualize the links between data and forms across CMA databases Participants also practice viewing case data, accessing statistical information provided in the CMA system and informing other users of updates in case events using the Lotus Mail function in the CMA system

This module thus comprises the following components

- Lotus Notes Basics
- Lotus Mail
- Overview of the CMA System and Databases
- The Case Database. Case. Event and Party Documents
- The Representative Database: Forms, Views and Operations
- The Importance of the CMA in Data Management and Case Administration

The weighting of the above components is designed to address the specific needs and entry level of the participants, as noted in Section 5 above

Throughout these components, the participants will receive hands-on practice at their stations, coupled with reference practice using the CMA User's Manual

The training program will follow this content outline.

MODULE	DAY	SESSION	TENTATIVE FOCUS AREA(S)
Module I: Introduction to the CMA	1	1	• Introduction to the CMA training: program: objectives and outline • Mini-workshop. problems with paper-based data entry and case administration
		2	• Introduction to the CMA: purpose and main functions of the new software • Introduction to the CMA User's Manual: discovery tasks
Module II: Data Entry Training Component II-A: Lotus Notes Basics	2	1	• The Lotus Notes workspace: menus, icons, bookmarks and status bars • The Lotus Notes database building blocks • Creating database bookmarks on the Lotus Notes workspace
		2	• Working with views • Working with documents • Review of Lotus Notes terms
	3	1	• Lotus Notes form elements and different field types
		2	• Application: working with different field types

MODULE	DAY	SESSION	TENTATIVE FOCUS AREA(S)
Component II-B: Lotus Mail	4	1	• Accessing the Lotus Mail database • Basic Lotus Mail functions and operations
		2	• Application. • Accessing and reading mail • Sending mail • Replying to mail • Forwarding mail • Attaching documents to mail messages
Component II-C: Overview of the CMA System and Databases	5	1	• Preview of the CMA Case Database case, party and event documents • CMA views • Document links
		2	• Preview of the CMA Representative Database • Data and document links across databases • Preview: the role of the CMA Administration/Log Database in supporting the system
Component II-D: The Case Database: Case, Event and Party Documents	6	1	• Creating and confirming case documents
		2	• Application tasks
	7	1	• Viewing and working with existing case documents
		2	• Application tasks
	8	1	• Editing, "refreshing" and saving case documents • Printing case labels and reports
		2	• Application tasks
	9	1	• Creating and confirming events (links to case documents) • Notifying users of pending events
		2	• Application tasks
	10	1	• Viewing past and pending events: categorization and statistical information under different views
		2	• Application tasks
	11	1	• Editing, "refreshing" and printing events • Changing event and case status
		2	• Application tasks

MODULE	DAY	SESSION	TENTATIVE FOCUS AREA(S)
	12	1	• Creating party documents (review of creating case documents cases with multiple parties) • Links to case documents
		2	• Application tasks
	13	1	• Viewing and editing party documents
		2	• Application tasks
Component II-E: The Representative Database: Forms, Views and Operations	14	1	• Creating representative documents
		2	• Application tasks
	15	1	• Viewing and editing representative documents • Application tasks
Component II-F: The Importance of the CMA in Data Management and Case Administration	15	2	• Mini-workshop: The importance of the CMA software package in data entry and case administration
Evaluation and Participant Demonstrations	16	1	• End-of-training evaluation paper-based instruments • First part of participant demonstrations
		2	• End of training evaluation second part of participant demonstrations

Table (iii): CMA Data Entry Content Outline.

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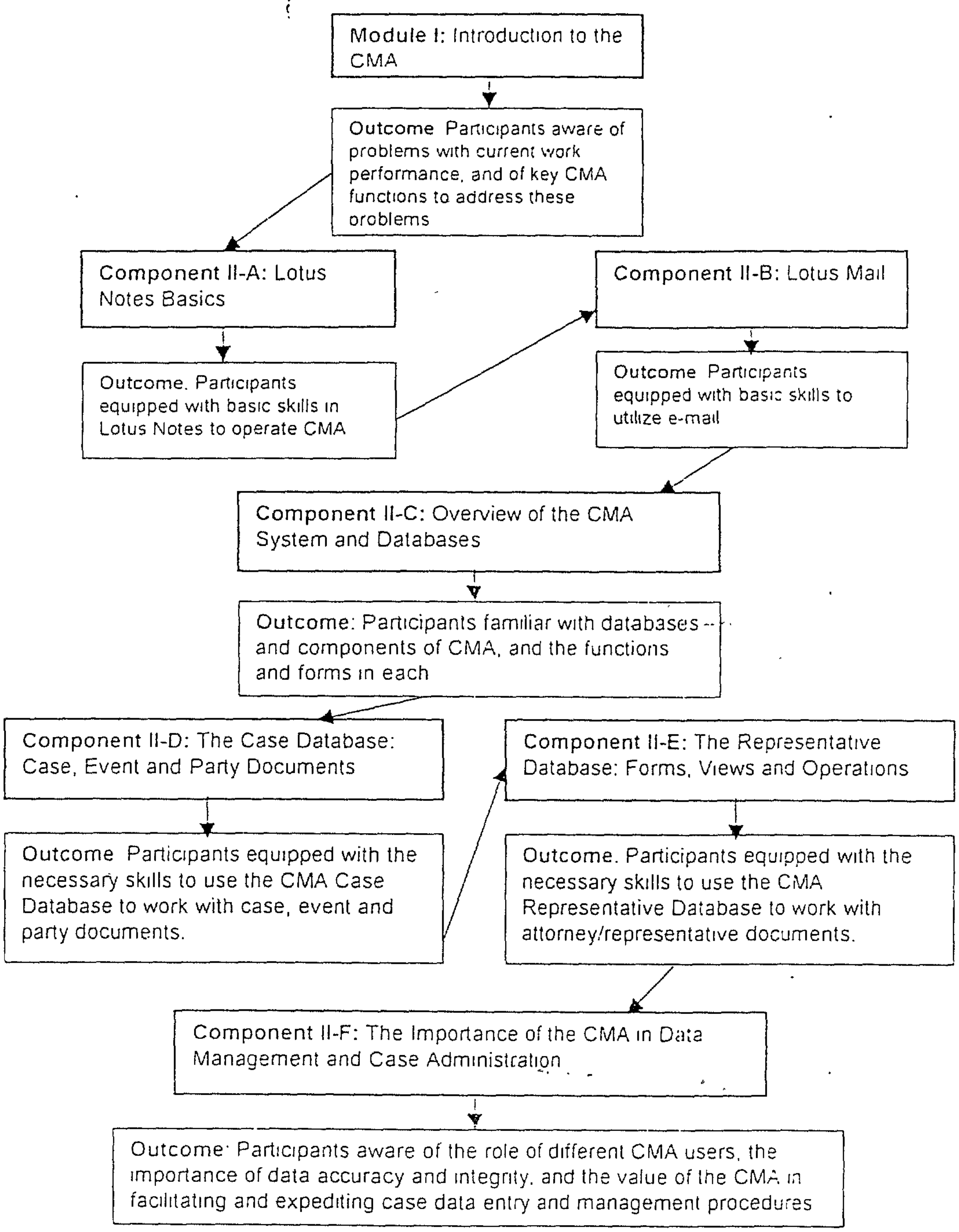
Program Map

The following program map illustrates the CMA Data Entry Program Components, and summarizes the expected outcome per component.



10. Program Duration and Sequence

The CMA Data Entry training program will consist of the following training events

- 3 pilot events of 9 participants each, for a total of 27 participants
- 14 training roll-out events of 8-9 participants each, for a total of 139 participants
- Total Number of Participants 166

Each of the above events will consist of 16 training days. Each training day will be divided into two sessions of 1 5 hours each, for a total of 3 contact hours per day Participants per event will receive 5 days of training per week.

11. Resources Needed for the Training

Given the nature of the training, constant use will be made of networked computers In addition a data show will be used to demonstrate CMA forms and operations in input sessions Participants will be expected to generate hard copies of case, event and party documents, as well as case reports, using a printer This equipment will be available at the NCC training facility

In addition to the equipment listed above, trainers will make use of an overhead projector to project transparencies as visual aids Use will also be made of a whiteboard and flipchart Again, the NCC training facility will be equipped with these training aids

12. Course Structure and Sequencing Principles

The design of the CMA Data Entry training program, with its various modules and components, is based on a task-centered structure Each component of the program offers participants initial input and demonstrations of various CMA features. This initial input is followed by extensive application on the part of the participants through tasks that draw on their work responsibilities Tasks are designed to reflect the relevant behavioral objectives (see Section 8 above). Participants' performance on these tasks will be compared with the expected standards of performance specified in these objectives. This will provide an opportunity for continuous assessment of the participants' performance and progress.

With regard to sequencing principles, the CMA Data Entry training program progresses from the broad/general to the specific On the basis of this principle, participants are exposed to a general overview of all CMA databases and components before they focus on the databases that are particularly relevant to their work. This is based on the premise that adults usually learn better when they are exposed to the big picture, which forms a schema for them to later on process and internalize detailed, focused training

In addition, components are sequenced from the easier to the more difficult, so that participants progress from basic terms and operations to more complicated data entry and viewing operations, then to data and document linkages and data management This principle allows participants to gain mastery over basic operations, and then build on those to master more complex concepts and operations

13. Methodology and Instructional Strategies

The methodological framework underlying the CMA Data Entry training program draws on adult learning principles and motivation Training sessions incorporate input and demonstrations on the part of the trainer, followed by guided application on the part of the participants, followed by extensive hands-on practice Participants will thus learn by doing through practical and highly interactive tasks Application tasks will engage participants in working with situations that arise in their work environments, thus capitalizing on their daily work experiences This should better enable the participants to observe the relevance of the new software to their work and professional advancement

Given the nature of this training program and the performance improvement results expected, participant application is given a higher weighting in the training sessions than trainer-led activities and demonstrations. Throughout participant application tasks, the trainer will monitor the participants' performance closely and will circulate among individual workstations to provide guidance and observe performance, as necessary This should cater for the needs of individual participants

In addition, the training program incorporates two mini-workshops in which the participants work together to articulate current problems with paper-based data entry and case administration and present the general importance of the CMA in facilitating and expediting data entry and case administration operations The workshops are designed to engage the participants in a different learning mode in which their own views become the basis of the training This should serve to enhance the participants' self image, and put them in a better position to achieve the affective/attitudinal objectives underlying the program.

Ample opportunities are provided throughout the training for the participants to review what they have learnt. Also, participants will be given opportunities throughout to ask questions to address their individual learning needs and learning strategies

14. Training Materials and Audio-Visual Aids

The following materials will be used in the CMA Data Entry Training Program:

- The Trainer's Guide, which provides background to the training program, a breakdown of training objectives and desired results from the training, a description of training components and content, an overview of the training methodology to be utilized, and an explanation of the evaluation methodology and instruments to be used throughout the training The Trainer's Guide also includes detailed session plans outlining the aims, content and materials per session, and detailing training activities, implementation steps interaction patterns and suggested timing

Necessary overhead transparencies and other training aids are included The Trainer's Guide also provides guidance as to the administration of the evaluation instruments

- The Trainee Guide, which includes an introduction to the training program, its purpose and objectives The Trainee Guide incorporates all the worksheets and handouts to be utilized by the participants throughout the training program.

- A CMA User's Manual, which provides detailed explanation and steps for operating the CMA. Each participant in the program will be given a copy of the User's Manual for reference

- An Evaluation Manual, which provides a detailed introduction to evaluation methodology and instruments as well as to general instrument administration principles The Evaluation Manual incorporates all formative and summative evaluation tools to be used throughout the training, both by the participants and by the trainer.

In addition to the above print media, the trainer and participants will utilize the arabized CMA software package, installed at the various computers/workstations It is worth noting that this training will focus on CMA Version 2.1, a version which incorporates several enhancements that resulted from piloting the software during a training program for the CMA Implementation Committee at the NCC

15. Products to be Developed by the Participants

Throughout the training, each participant will develop the following products

- at least 3 full cases, including a case document, at least two party documents, and at least three event documents per case, entered in the CMA Case Database,
- at least 1 case document and 1 case label printed and added to the participant's training file, and
- at least 5 representative/attorney forms completed and entered in the CMA Representative Database.

The above participant products will be evidenced through data added and viewed in the CMA system

16. Methods for Obtaining Feedback on Participant Satisfaction

Participant feedback as to satisfaction with training will be solicited on a formative as well as summative basis Formative feedback will be obtained mid-way through the training (on day 8) via an Ongoing Training Evaluation Questionnaire Data from this questionnaire will be used by the trainers to address any issues with the training and enhance participant satisfaction during the second half of each training event

In addition to the above evaluation trainers will use the DT2 Training Program Exit Evaluation Form to assess participant satisfaction and learning This instrument will enable trainers to avoid administering several evaluation instruments to evaluate satisfaction and acquisition.

17. Instruments for Measuring Participants' Learning

The 16th day of each training event focuses on evaluation. Evaluation of participants' learning will be handled through two evaluation media:

- A paper-based evaluation instrument focusing on the acquisition of key terms, concepts and other knowledge areas. The paper-based instrument will also tap the participants' internalization of some of the key positive attitudes imparted during the training The paper-based instrument will be administered during session 1 of day 16
- Participant demonstrations of data entry operations, observed and evaluated for accuracy and speed by the trainer. Demonstrations will be scheduled during the second half of session 1, then during session 2 of day 16

In addition to the above formal evaluation measures, participants' will be observed throughout the training to assess their progress per behavioral objective listed in Table (ii) Such structured observations of progress will be recorded by the trainer in a Participant Observation Sheet (incorporated in this Trainer's Guide)

Participants will also be given the opportunity to assess their own progress through a Training Checklist in which they record their own assessment of their progress and achievement per component of the training. This Training Checklist is incorporated in the Trainee Guide

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HOW TO USE THIS TRAINER'S GUIDE

This Trainer's Guide starts with a **Training Schedule** outlining all the events of the CMA Data Entry training. It then provides a **Participant Observation Sheet** to be used by the trainer throughout the training course. The observation sheet is based on the behavioral objectives underlying the training, and the enabling objectives that constitute the building blocks for achieving the behavioral objectives (see table ii, pages 6 to 9). In certain cases, several enabling objectives have been grouped into one or more main items (e g the enabling objectives under 8.13). This should facilitate the process of assessing the participants' achievement of these objectives.

The Participant Observation Sheet is to be used by the trainer to record observations regarding the achievement levels of the participants vis-à-vis each objective throughout the course. This sheet with thus serve a dual purpose. it will enable the trainer to monitor the participants' progress and make any necessary changes to the course content or schedule; it will also provide assessment findings for the course evaluation component of the end-of-training report

The Trainer's Guide proceeds to provide Session Plans for each session of the training per training day. The session plan consists of the following items.

- The behavioral and specific enabling objectives that the session supports (in terms of session aims);
- The content to be covered in the session,
- The activities or tasks that the participants will perform,
- Training notes for implementing these activities/tasks,
- Estimated time per activity/task;
- Assignments to be given to the participants at the end of given sessions, as necessary,
- A copy of overhead projector transparencies and other visual aids, and
- A section for the trainer to make notes at the end of each session, recording important observations regarding what went well, what could be improved in future training programs, and general participant progress

The Trainer's Guide also includes a copy of all **Evaluation and Feedback Instruments** to be used with this training program, accompanied by guidelines for administering these instruments.

For ease of reference, the trainer is advised to use the **Table of Contents** at the beginning of this Guide to locate sections or information that may be relevant to particular sessions or components of the training.

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CMA DATA ENTRY TRAINING: OVERALL SCHEDULE

Stage/Deliverable	2000																								
	June 4-8	June 10-15	June 17-22	June 24-29	July 1-6	July 8-13	July 15-20	July 22-27	July 29 - Aug 3	Aug 5-10	Aug 12-17	Aug 19-24	Aug 26-31	Sept 2-7	Sept 9-14	Sept 16-21	Sept 23-28	Sept 30-Oct 5	Oct 7-12	Oct 14-19	Oct 21-26	Oct 28 - Nov 2	Nov 1-9	Nov 11-16	Nov 18-23	Nov 25-30
Pilot 1																									
Pilot 2																									
Pilot 3																									
Progress Report																									
Fine-Tuning of Training																									
Fine-Tuning of CMA																									
Roll-Out Training Event 1																									
Roll-Out Training Event 2																									
Roll-Out Training Event 3																									
Roll-Out Training Event 4																									
Progress Report																									
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Progress Report																									
Roll-Out Training Event 9																									
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Roll-Out Training Event 11																									
Roll-Out Training Event 12																									
Progress Report																									
Roll-Out Training Event 13																									
Roll-Out Training Event 14																									
Final Report																									

For details regarding tentative start and end dates, as well as public/national holidays, please refer to the table on page 20

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Stage/Deliverable						2001								
	Dec 2-7	Dec 9-14	Dec 16-21	Dec 23-28	Dec 30 - Jan 4	Jan 6-11	Jan 13-18	Jan 20-25	Jan 27 - Feb 1	Feb 3-8	Feb 10-15	Feb 17-22	Feb 24 - Mar 1	Mar 1-8
Pilot 1														
Pilot 2														
Pilot 3														
Progress Report														
Fine-Tuning of Training														
Fine-Tuning of CMA														
Roll-Out Training Event 1														
Roll-Out Training Event 2														
Roll-Out Training Event 3														
Roll-Out Training Event 4														
Progress Report														
Roll-Out Training Event 5														
Roll-Out Training Event 6														
Roll-Out Training Event 7														
Roll-Out Training Event 8														
Progress Report														
Roll-Out Training Event 9														
Roll-Out Training Event 10														
Roll-Out Training Event 11														
Roll-Out Training Event 12														
Progress Report														
Roll-Out Training Event 13														
Roll-Out Training Event 14														
Final Report														

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CMA DATA ENTRY: TENTATIVE START AND END DATES PER EVENT

Event	Start Date	End Date	Time
Pilot 1	June 4, 2000	June 26, 2000	9 00 a m - 12 30 p m
Pilot 2	June 4, 2000	June 26, 2000	1.00 p.m - 4.30 p m
Pilot 3	June 29, 2000	July 20, 2000	1 00 p m - 4 30 p m
Progress Report Final technical changes to CMA and fine-tuning of program after pilot events.			
Roll-Out Event 1	September 2, 2000	September 23, 2000	9 00 a m - 12 30 p m
Roll-Out Event 2	September 2, 2000	September 23, 2000	1 00 p m. - 4 30 p m
Roll-Out Event 3	September 26, 2000	October 17, 2000	9 00 a m - 12 30 p m
Roll-Out Event 4	September 26, 2000	October 17, 2000	1 00 p.m. - 4 30 p m
Progress Report			
Roll-Out Event 5	October 21, 2000	November 11, 2000	9:00 a m - 12 30 p.m.
Roll-Out Event 6	October 21, 2000	November 11, 2000	1.00 p.m - 4 30 p m
Roll-Out Event 7	November 14, 2000	December 5 2000	9 00 a m - 12 30 p m.
Roll-Out Event 8	November 14, 2000	December 5, 2000	1 00 p m - 4 30 p m
Progress Report			
Roll-Out Event 9	December 9, 2000	January 3, 2001 December 27 is possibly the Eid	9 00 a m - 12 30 p m
Roll-Out Event 10	December 9, 2000	January 3, 2001	1 00 p m. - 4 30 p m
Roll-Out Event 11	January 9, 2001 (January 7 is Coptic Christmas)	January 30, 2001	9.00 a.m. - 12 30 p m
Roll-Out Event 12	January 9, 2001	January 30, 2001	1.00 p m. - 4 30 p.m
Progress Report			
Roll-Out Event 13	February 3 2001	February 24, 2001	9 00 a m - 12 30 p m
Roll-Out Event 14	February 3, 2001	February 24, 2001	1 00 p m - 4 30 p m
Final Report			

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PARTICIPANT OBSERVATION SHEET

☐ PILOT ☐ EVENT NUMBER ______	TOTAL NUMBER OF PARTICIPANTS ______

OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
8.1 Work with Lotus Notes views, documents and form elements, given a Lotus-based database, with a high degree of ease and confidence				
• Start Lotus Notes.				
• Recognize the Lotus Notes workspace: menus, smart icons, database bookmarks and status bar.				
• Identify the Lotus Notes database building blocks				
• Open documents and categories in different views.				
• Identify basic operations for creating, editing, saving and closing documents				
• Recognize and utilize different field types: text fields, drop menus and dialogue lists, number fields, calendar fields and rich-text fields				
• Manipulate font characteristics in rich text fields for data emphasis				
• Identify and utilize action buttons, hotspots, sections and embedded views.				

OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
8.2 Use basic features of Lotus Notes Mail to communicate case events to CMA users, given a pending event or a schedule of events, with a high degree of ease, confidence and accuracy.				
• Select recipients of mail from the CMA Address Book				
• Send mail				
• Receive mail and recognize old versus new (unread) mail.				
• Read mail				
• Reply to mail				
• Forward or delete mail				
• Attach documents to mail				
8.3 Create case documents using the CMA Case Database, given case-related data, with a high degree of accuracy.				
• Initiate a case document.				
• Enter case details.				
• Enter party data (for single-party and multiple-party cases)				
• Transfer data from party documents to case documents				

OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
• Select or enter a case number				
• Confirm, save and close case documents				
8.4 View case documents, given different sorting criteria and categories, with a high degree of ease, confidence and competence.				
• View cases categorized by case number.				
• View cases categorized by subject.				
• View cases categorized by circuit				
• View pending/current cases categorized by year filed				
• View past/closed cases				
8.5 Edit and update case status in existing case documents, given case number, details and new status, with a high degree of accuracy.				
• Open and edit an existing case document.				
• Open and edit party documents from an existing case				
• Update case status				

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OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
8.6 Print case documents, given completed case details and forms, with a high degree of competence.				
• Print case labels.				
• Convert case documents to print form				
• Print case forms and documents.				
• Switch between the non-editable print version and the editable full version of a case document.				
8.7 Create and confirm events, given case details and event schedules/written notifications, with a high degree of accuracy.				
• Create an event from a case document				
• Create an event from a view				
• Attach documents to case events.				
• Access the full case document from an event document.				
• Confirm an event				
• Notify users of an event using Lotus Notes mail				
• Save and close an event document.				
8.8 View past and pending events, given different sorting criteria and categories, with a high degree of ease, confidence and competence.				
• View past events under different sorting criteria				

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OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
• View pending events under different sorting criteria • Use event views to monitor case progress				
8.9 Edit existing event documents, given new event details and status, with a high degree of accuracy. • Open and edit events from the full case document • Open and edit events from views • Update event status • Save changes to event documents				
8.10 Create and view party/litigant documents, given party data, with a high degree of accuracy. • Create new party forms for a case. • Transfer attorney/representative data from the CMA Representative Database to party documents • Access the full case form from a party document • View party documents categorized by party name or by party ID.				
8.11 Edit existing party documents, given new party data and status, with a high degree of accuracy. • Edit a party document from a full case document • Open and edit a party document from views				

OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
• Save changes to party documents				
• Print party documents				
• Refresh case documents to reflect changes made to party documents.				
8.12 Utilize the CMA Representative database, given attorney/ representative data, with a high degree of ease, accuracy and competence.				
• Create representative documents.				
• Save and close representative documents				
• View representative documents categorized by name, city/ region/governorate or postcode				
• Edit existing representative documents				
• Use the Representative Database in relationship to party documents for data entry.				
8.13 Conduct search operations in the various CMA databases, given a search item or criterion, with a high degree of ease, accuracy, and speed.				
• Search for case documents by different search and sorting criteria.				
• Search for party documents by different search and sorting criteria				
• Search for attorney/representative documents by different search and sorting criteria.				

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OBJECTIVE	NUMBER OF PARTICIPANTS ACHIEVING OBJECTIVE/ STANDARD REQUIRED			COMMENTS
	0-3	4-6	7-9	
8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy.				
• Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA				
• Utilize the User's Manual to address questions and problems with case documents.				
• Utilize the User's Manual to address questions and problems with event documents				
• Utilize the User's Manual to address questions and problems with party documents				
• Utilize the User's Manual to address questions and problems with attorney/representative documents.				
8.15 Identify the functions of the CMA for data management and case administration with a high degree of competence and conviction.				
• Identify the roles and responsibilities of CMA users				
• Briefly describe issues of data access control for different CMA users				
• Explain the importance of data accuracy and integrity.				
• Describe the value of the CMA in facilitating and expediting data maintenance, retrieval and management				

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DAY 1
SESSION 1: INTRODUCTION TO THE CMA DATA ENTRY TRAINING
SESSION PLAN

Session Aims	• To elicit and address participants' expectations from the training • To introduce the participants to the purpose, objectives and expected results of the CMA Data Entry training • To establish a "code of conduct" for the training • To introduce the participants to the concepts of self-assessment and training evaluation throughout the course • To elicit participants' opinions and experience regarding problems with manual/paper-based case data entry and processing (setting the scene for the data entry aspects of the CMA)
Behavioral Objective(s) Supported	• Preparation for 8.15 Identify the functions of the CMA for data management and case administration with a high degree of competence and conviction
Enabling Objective(s)	• N/A
Content to be Covered	• Brief Introduction to the CMA Data Entry training • Problems with paper-based case data entry and processing (workshop)
Materials	• OHTs 1, 2 and 3 • Worksheets 1 and 2

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Introductions • Trainer briefly introduces him/herself • Participants briefly introduce themselves Trainer checks names in register • Trainer distributes copies of Trainee Guide, CMA User's Manual participant training files and stationery	Trainer - Participants (whole group)	10
2	OHTs 1, 2 and 3 - OHP	Introducing the purpose of the CMA Data Entry training, its objectives and results • Trainer uses OHT 1 to present purpose of CMA Data Entry training • Trainer uses OHT 2 to present the main objectives underlying the CMA Data Entry training in very basic terms Trainer unmasks and discusses one objective at a time Trainer elicits from participants any other important objectives they might have for this training. • Trainer uses OHT 3 to present the expected results from this training, unmasking one result at a time • Trainer elicits feedback regarding results from participants	Trainer - Participants (whole group)	20

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
3	Flipchart or A2 paper	**Establishing training "code of conduct"** • Trainer transitions to this activity by asking "How are we going to achieve these results? How are we going to work together?" Elicits training room "rules" (e g mobile phones off - no smoking - tardiness [as a joke!] etc) • Trainer records "rules" on flipchart or A2 paper and displays in training room throughout training	Trainer - Participants (whole group)	10
4	Worksheet 1	**Introducing the concept of on-going self-assessment and training evaluation** • Trainer transitions to this activity by asking "How are we going to know that we are achieving the results of the training?" • Trainer introduces Worksheet 1 Training Checklist to the participants, clarifying purpose and explaining/modeling how each item will be assessed by the participants • Trainer asks participants to keep their Training Checklists for discussion at regular intervals throughout the course • Trainer elicits participants' feedback, highlighting the importance of this approach to on-going self assessment	Trainer - Participants (whole group)	10
5	Worksheet 2	**Mini-workshop: problems with manual/paper-based case data entry and processing** • Trainer models activity by eliciting from participants their opinion of current problems with manual/paper-based case data entry and processing - asks leading questions regarding turnaround time, access to files etc • Trainer introduces Worksheet 2 to the participants, highlighting the importance of objectivity in this activity • Trainer asks participants to work in pairs/small groups to brainstorm and list problems • Trainer monitors and guides throughout pair/group work • Trainer elicits participants' feedback and notes important points • Trainer explains that, throughout the training, the group will observe the benefits of the CMA in addressing the problems they noted in this mini workshop	Trainer - participants (whole group) Pairs/small groups Plenary discussion	40

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OHT 1

CASE MANAGEMENT APPLICATION (CMA): DATA ENTRY TRAINING

MAIN PURPOSE

- To improve case-related data entry and maintenance/updating, access to reliable data, and speed of access.

- This, in turn, will lead to improved case administration and management in the court.

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OHT 2

TRAINING OBJECTIVES

- Work with Lotus Notes to operate the CMA.
- Use Lotus Notes Mail to communicate case events to CMA users.
- Create, view, edit and print case documents using the CMA Case Database.
- Create, confirm, view and edit case events.
- Create, view and edit party documents.
- Utilize the CMA Representative Database to store and retrieve attorney data.
- Search for and locate documents/data easily in the CMA Databases.
- Utilize the CMA User's Manual to address problems with operating the CMA.
- Identify the functions of the CMA for case data entry and processing/administration.

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OHT 3

EXPECTED RESULTS

- Increased access to accurate and reliable case-related data; and
- Increased speed of access to case-related data.

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WORKSHEET 1
TRAINING CHECKLIST: WHAT HAVE I ACHIEVED IN THE CMA TRAINING?

Use this checklist throughout the course to assess your progress and degree to which you have achieved each objective or result.

OBJECTIVES:

√	OBJECTIVE	COMMENTS
	• Work with Lotus Notes to operate the CMA.	
	• Use Lotus Notes Mail to communicate case events to CMA users.	
	• Create, view, edit and print case documents using the CMA Case Database.	
	• Create, confirm, view and edit case events.	
	• Create, view and edit party documents.	
	• Utilize the CMA Representative Database to store and retrieve attorney data	
	• Search for and locate documents/data easily in the CMA Databases.	
	• Utilize the CMA User's Manual to address problems with operating the CMA	
	• Identify the functions of the CMA for case data entry and processing/administration.	

RESULTS:

√	RESULT	COMMENTS
	• Increased access to accurate and reliable case-related data	
	• Increased speed of access to case-related data	

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WORKSHEET 2
PROBLEMS WITH PAPER-BASED CASE DATA ENTRY AND PROCESSING

Work in pairs or small groups. List the problems you encounter with manual/paper-based case data entry and processing Think about the following categories

Maintaining data

Maintaining case files

Filing party documents

Entering and monitoring case events

Locating data and responding to requests for documents

Reading hand-written data

Other

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DAY 1
SESSION 2: INTRODUCTION TO THE CMA
SESSION PLAN

Session Aims	• To introduce the participants to the purpose and main technical features of the CMA software • To briefly demonstrate to the participants some of the main data entry features of the CMA • To introduce the participants to the CMA User's Manual and enable them to explore its potential as a reference tool
Behavioral Objective(s) Supported	• Preparation for 8.15 Identify the functions of the CMA for data management and case administration with a high degree of competence and conviction • Preparation for 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• N/A
Content to be Covered	• Brief introduction to the purpose and main data entry features of the CMA • Brief introduction and discovery of the CMA User's Manual
Materials	• OHT 4 • Worksheet 3

Activity Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	OHT 4 - OHP	Introduction to the CMA: purpose and main data entry features • Trainer transitions from the break by referencing the problems with paper-based case data entry and processing discussed before the break and explaining that the group will now start exploring how the CMA addresses these problems • Trainer uses OHT 4 to initiate/present the main purpose and features of the CMA • Trainer elicits participants' feedback	Trainer - Participants (whole group)	10
2	Relevant CMA windows - Data show	Brief demo of the features of the CMA • Trainer demonstrates to the participants some main aspects of the CMA (e g case document and important fields, party documents, sample event documents, representative/attorney document, initial data entry) • Trainer fields questions	Trainer - Participants (whole group)	30
3	Worksheet 3 - CMA User's Manual	Discovery task: CMA User's Manual • Trainer briefly introduces the importance of the CMA User's Manual as a reference tool. • Trainer introduces Worksheet 3 and clarifies discovery task Trainer does first two items with participants as a model • Trainer asks participants to work in pairs to find the answers to the remaining questions • Trainer monitors throughout pair work activity and provides help/guidance as necessary	Trainer - Participants (whole group) Pair work Group discussion	50

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer checks answers with the whole group (answer key provided on page 39 of this Trainer's Guide)		

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OHT 4

WHAT IS THE CMA?

- It is a Lotus Notes database application.
- It is a customized Arabic language application for Egyptian courts.
- It consists of three main databases:
  - The Case Database (for storing and retrieving all case-related data)
  - The Representatives Database (for storing and retrieving attorney data)
  - The Administration/Log Database (for CMA administrators and technical support)
- The system will be used by circuit clerks to input case, event and party data, as well as attorney data, and to output information for case management purposes.

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WORKSHEET 3
INTRODUCTION TO THE CMA USER'S MANUAL

Look through the CMA User's Manual quickly to find answers to the following questions
Use the Table of Contents to find the relevant sections and information

QUESTION	NOTES
1. On what pages can the user find a definition of icons used in the CMA?	
2 How can the user find the contents of each chapter in the CMA User's Manual?	
3 What are the main elements of a Lotus Notes database? Where in the User's Manual can you find this information?	
4. Where can you find information about sending and receiving mail using Lotus Notes Mail?	
5 On which page(s) can you find the steps for creating a case?	
6 Look through Chapter 4 of the User's Manual. What is meant by case views? How many kinds of case view do you get in the CMA?	
7 Where can you find information about printing case documents?	
8 Where can you find steps and instructions for completing an event of the type "fees"? What form is this information presented in?	
9. Look at the CMA window on page 93. How many sub-categories or classifications of events do you find under "past events"?	
10. In which chapter of the CMA User's Manual can you find information about party documents and data?	
11 Look at page 125 of the User's Manual What button does a user press to create a new party document?	
12 Look at page 134 of the CMA User's Manual What information does the representative form provide regarding a given attorney?	

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WORKSHEET 3
INTRODUCTION TO THE CMA USER'S MANUAL
TRAINER'S ANSWER KEY

Look through the CMA User's Manual quickly to find answers to the following questions
Use the Table of Contents to find the relevant sections and information

QUESTION	NOTES
1 On what pages can the user find a definition of icons used in the CMA?	Pages in Roman numbers i-ii-iii
2 How can the user find the contents of each chapter in the CMA User's Manual?	Each chapter starts with a list of contents of the chapter in question
3 What are the main elements of a Lotus Notes database? Where in the User's Manual can you find this information?	Documents, forms and views Pages 9-10
4 Where can you find information about sending and receiving mail using Lotus Notes Mail?	Pages 20-21.
5 On which page(s) can you find the steps for creating a case?	Pages 34-37
6 Look through Chapter 4 of the User's Manual What is meant by case views? How many kinds of case view do you get in the CMA?	This is a screen that lists cases under different sorting criteria Four (in this chapter) Pages 60-69
7. Where can you find information about printing case documents?	Chapter 6
8 Where can you find steps and instructions for completing an event of the type "fees"? What form is this information presented in?	Page 88 - in a table
9 Look at the CMA window on page 93. How many sub-categories or classifications of events do you find under "past events"?	Eight
10. In which chapter of the CMA User's Manual can you find information about party documents and data?	Chapter 10.
11. Look at page 125 of the User's Manual What button does a user press to create a new party document?	Record Party Data
12 Look at page 134 of the CMA User's Manual. What information does the representative form provide regarding a given attorney?	Name, ID number, address, telephone number, fax number type of syndicate registration, number of syndicate registration

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DAY 2
SESSION 1: INTRODUCTION TO LOTUS NOTES DATABASES
SESSION PLAN

Session Aims	• To introduce the participants to some of the key applications and uses of Lotus Notes • To enable the participants to start operating Lotus Notes • To familiarize the participants with the Lotus Notes workspace menus smart icons and status bar • To enable participants to open databases for the first time and create database icons in the Notes workspace • To familiarize participants with the main elements or building blocks of a Lotus Notes database • To introduce some key terms related to Notes databases
Behavioral Objective(s) Supported	• 8.1 Work with Lotus Notes views, documents and form elements, given a Lotus-based database, with a high degree of ease and confidence • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Start Lotus Notes • Recognize the Lotus Notes workspace menus smart icons database bookmarks and status bar • Identify the Lotus Notes database building blocks • Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Introduction to Lotus Notes applications • The Lotus Notes workspace • The Lotus Notes database building blocks • Key terms
Materials	• OHTs 5 and 6 • Worksheet 4 • User's Manual pages 5-10 (for reference)

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	OHT 5 - OHP	**Introduction to Lotus Notes** • Quick review trainer elicits from participants that the CMA is a Lotus Notes application • Trainer transitions by asking "so what is Lotus Notes?" • Trainer uses OHT 5 to present the main uses and applications of Lotus Notes, unmasking one point at a time • Trainer fields questions	Trainer - Participants (whole group)	10
2	Relevant parts of Lotus Notes - Data show	**Demonstration and hands-on practice: starting Lotus Notes** • Trainer demonstrates entering passwords to start operating Lotus Notes • Trainer demonstrates steps for starting Lotus Notes and getting to the Lotus Notes workspace • Participants follow same steps at own computers Trainer monitors closely, with technical support staff assisting and addressing any problems at this stage • Trainer refers participants to pages 6-7 of the User's Manual	Trainer - Participants (whole group) Individual practice	15

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes

3	Snapsnot of the Lotus Notes workspace - Data show	**Demonstration of Lotus Notes workspace**
		• Trainer introduces the Lotus Notes workspace focusing on the following elements
		  • Menus
		  • Smart icons
		  • Status bar
		  • Worksheets
		• Trainer briefly presents the functions of each of the above elements
			Trainer - Participants (whole group)	10

4	Relevant aspects of Lotus Notes - Data show	**Demonstration and hands-on practice: opening a database for the first time** • Trainer demonstrates the steps for opening a database for the first time and creating a database bookmark in the Lotus Notes workspace • Trainer explains the significance of read versus unread documents in each database, shown as colour-coded numbers on icon • Participants follow same steps at own computers • Trainer gets participants to delete database bookmarks and re-create them several times for practice • Trainer fields questions	Trainer - Participants (whole group) Individual practice	20
5	OHT 6 - OHP - Data show	**Introduction and initial practice: key database building blocks and related terms** • Trainer uses OHT 6 to present key elements or building blocks of a Lotus Notes database • Trainer demonstrates by showing documents, forms, fields and views using data show • Trainer gets participants to open the CMA Case Database and observe the initial screen and the views it offers	Trainer - Participants (whole group)	20
6	Worksheet 4	**Participant quiz: definitions** • Trainer introduces worksheet 4 and clarifies purpose Trainer highlights importance of writing definitions of terms in ones own wording in order to remember what the terms stand for • Trainer asks participants to work individually to define terms on worksheet • Trainer monitors and provides help where necessary • Trainer asks participants to look through the User's Manual pages 5-10, to check their answers • Trainer discusses answers and fields questions	Trainer - Participants (whole group) Individual work	15

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OHT 5

WHAT IS LOTUS NOTES?

It is a computer program that enables its users to do the following:

- store data and retrieve it from Lotus Notes databases;
- perform statistical operations on data;
- send and receive electronic mail;
- share information and files with other users;
- monitor work progress;
- archive data; and
- work better in teams.

OHT 6

THE LOTUS NOTES DATABASE BUILDING BLOCKS

Database	This is where data is stored, according to the topic or nature of this data.
Document	This is the main data storage unit inside a database.
Form	Within documents, data is entered in forms.
Field	Each form has a number of fields to be completed with data.
View	This is a way to display documents and data in a database.

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WORKSHEET 4
LOTUS NOTES: TERMS AND DEFINITIONS

Look at the following Lotus Notes terms What does each one mean? What is its function in Lotus Notes?

Menu ______________________________

Icon ______________________________

Bookmark ______________________________

Status bar ______________________________

Document ______________________________

Form ______________________________

Field ______________________________

View ______________________________

Now look at the CMA User's Manual, pages 5-10, and check your answers

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DAY 2
SESSION 2: WORKING WITH LOTUS NOTES VIEWS AND DOCUMENTS
SESSION PLAN

Session Aims	• To familiarize participants with the principles of Lotus Notes views sorting classification and sub-classification • To introduce the participants to some of the basic views and classifications in the CMA • To familiarize the participants with Lotus Notes documents • To familiarize the participants with basic operations for opening completing editing saving and printing documents in the CMA
Behavioral Objective(s) Supported	• 8.1 Work with Lotus Notes views, documents and form elements, given a Lotus-based database, with a high degree of ease and confidence • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Open documents and categories in different views • Identify basic operations for creating, editing, saving and closing documents • Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Lotus notes view components navigation pad, view pad classification arrows and criteria • Lotus Notes views and document classification in different views • Viewing documents under different views • Opening documents in Lotus Notes databases • Opening, completing, editing, saving, closing and printing documents in the CMA basic operations
Materials	• User's Manual pages 10-13

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show	Introduction to Lotus Notes views, with particular reference to the CMA • Trainer leads in by showing that, before the break, participants had got so far as the databases in Lotus Notes Now they are going to observe the different views that a database offers • Trainer demonstrates by opening CMA Case Database and bringing up the view window • Trainer shows participants the navigation and view pads/panels, and explains the functions of each • Trainer shows categorization in the CMA Case Database • Trainer highlights different views to show the classification of documents and data under each • Trainer explains, while demonstrating, the function of the right-facing arrows next to given documents under views, and clicks to show sub-classifications Trainer explains the significance of the arrows facing downwards • Trainer explains meaning of symbols used in CMA to signify case forms, party forms and event forms	Trainer - Participants (whole group)	10

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	Relevant sections of CMA - Data show	**Hands-on application: working with Lotus Notes/ CMA views** • Trainer gives participants instructions to open the CMA Case Database • Participants follow steps to look at different views and observe the classification of documents and data under each view • Trainer monitors and provides help/guidance as necessary • Trainer fields questions	Individual practice	15
3	Relevant sections of CMA - Data show	**Introduction and initial practice: refreshing views** • Trainer explains purpose of refreshing/updating views • Trainer illustrates methods for refreshing views pressing F9, selecting "refresh" from the view menu, or using the "refresh" icon • Participants try out different methods	Trainer - Participants (whole group) Individual practice	10
4	Relevant sections of CMA - Data show	**Introduction and demonstration: creating Lotus Notes/CMA documents** • Trainer transitions by reviewing/eliciting the definition of a document from the previous session Trainer revises basic terminology (documents, forms, fields) • Trainer explains and demonstrates two methods for creating a new document from "create" menu, or by pressing relevant action button in a given view (i e the action button for initiating a new case document) • Trainer demonstrates completing one or two fields, then saving the document by selecting "save" from the file menu • Participants follow trainer's steps at own computers	Trainer - Participants (whole group)	15
5	Relevant sections of CMA - Data show	**Introduction and demonstration: opening and editing Lotus Notes/CMA documents** • Trainer transitions by indicating that participants will now observe now to open an existing document in the CMA databases • Trainer selects a document from a given view and demonstrates opening it by double clicking • Trainer demonstrates that data cannot be entered into the document at this stage because it is not open in "edit" mode Trainer tries to enter data but fails • Trainer shows that, to edit a document participants have to double-click it to change it to "edit" mode This will enable them to enter data • Trainer provides alternatives selects another document from views and opens it by selecting "edit" from menus, or uses action button "edit document" at the top of the document • Trainer fields questions	Trainer - Participants (whole group)	10

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
6	Relevant sections of CMA - Data show	**Hands-on application: working with Lotus Notes/ CMA documents** • Trainer gives participants instructions to open a new case document from "initiate case" action button • Participants enter data into one or two fields • Participants save document (without serial number, as a test) • Participants practice steps for opening and editing an existing case document Participants try out different methods of converting a case document from "read only" mode to "edit" mode • Trainer monitors and provides help/guidance as necessary	Individual practice	20
7	Relevant sections of CMA - Data show	**Introduction and demonstration printing Lotus Notes/CMA documents** • Trainer demonstrates process for printing case document from file menu, print • Participants practice by selecting an existing case document and printing it	Trainer - Participants (whole group)	10
8	User's Manual, pages 5-13	**Home assignment** • Trainer asks participants to review pages 5-13 of the User's Manual and note questions to ask the trainer on the next day	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide				

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DAY 3
SESSION 1: LOTUS NOTES/CMA DOCUMENTS: FIELD TYPES
SESSION PLAN

Session Aims	• To familiarize the participants with the different types of fields in Lotus Notes/CMA documents • To familiarize the participants with the types of data that are entered in each type of field
Behavioral Objective(s) Supported	• 8.1 Work with Lotus Notes views documents and form elements, given a Lotus-based database with a high degree of ease and confidence • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy.
Enabling Objective(s)	• Recognize and utilize different field types in database forms text fields, drop menus and dialogue lists, number fields, calendar fields and rich-text fields • Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Types of fields in Lotus Notes/CMA documents
Materials	• OHT 7 and 8 • User's Manual pages 14-16

Activity, Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	OHT 7 - OHP	**Introduction to types of fields in Lotus Notes/ CMA documents** • Trainer leads in by eliciting from participants that a database contains documents/forms each of which consists of a number of fields to be completed by the user (review of day 2) • Trainer introduces purpose of session to become familiar with the different types of fields in CMA forms • Trainer uses OHT 7 to present each type of field and give an example, unmasking one type of field at a time • Trainer fields questions	Trainer - Participants (whole group)	25
2	Relevant sections of CMA - Data show	**Demonstration: types of fields** • Trainer demonstrates types of fields by opening a case document and pointing at each field explaining field type and data entered in it • Trainer points at some of the field types (e g text field for names of parties, calendar field for date of case, and drop menu/dialogue list for location of case file) Trainer shows data entered, then elicits from participants the type of field from the OHT presentation in the previous activity • Trainer demonstrates characteristics of rich text fields by typing data into the "notes" field at the bottom of a case document and highlighting colour of font • Trainer demonstrates steps for changing font colour, size and characteristics in rich text fields • Trainer demonstrates choice buttons in party documents • Trainer fields questions	Trainer - Participants (whole group)	45

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Activity Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
3	OHT 8 - OHP	Introduction and demonstration: editable and computed fields • Trainer uses OHT 8 to explain to participants that all the different field types fall into two main categories editable (where users enter data themselves) and computed or locked (where users cannot enter data but rather depend on the CMA system to perform a certain operation or calculation and provide the data for the field) • Trainer demonstrates by showing text or number fields (editable) in case documents versus case number and case duration fields (computed) • Trainer explains to participants that they will practice using different types of fields after the break • Trainer fields questions • Trainer refers participants to pages 14-16 of the User's Manual	Trainer - Participants (whole group)	20

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OHT 7

LOTUS FIELDS

Text field	Users enter text or numbers, but cannot format font or style of text.
Rich text field	Users enter text, format font and style and attach other documents.
Number field	Users only enter numbers.
Date field	Users enter a date or select it from the calendar.
Choice box	Users insert "x" to select one or more boxes.
Choice button	Users click to choose one item only.
Dialogue list	Users click arrow to get a list of choices, then select item.

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OHT 8

FIELD CATEGORIES

Fields in Lotus Notes and CMA forms are classified into two categories:

Editable	Users enter data themselves.
Computed	Users cannot enter data. The CMA system performs a certain operation or calculation to provide the data for the field.

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DAY 3
SESSION 2: APPLICATION: LOTUS FIELDS AND FEATURES
SESSION PLAN

Session Aims	• To enable the participants to use the different types of fields in Lotus Notes/CMA documents • To familiarize the participants with the functions of action buttons, hotspots, sections within documents and embedded views
Behavioral Objective(s) Supported	• 8.1 Work with Lotus Notes views, documents and form elements, given a Lotus-based database, with a high degree of ease and confidence • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Recognize and utilize different field types in database forms text fields, drop menus and dialogue lists, number fields, calendar fields and rich-text fields • Manipulate font characteristics in rich text fields for data emphasis • Identify and utilize action buttons hotspots and sections • Utilize the User s Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Review of types of fields in Lotus Notes/CMA documents • Introduction to the functions of action buttons, hotspots, sections within documents and embedded views
Materials	• OHT 7, 8 and 9 • Worksheet 5 • User's Manual pages 14-16 (review) then 16-19

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Worksheet 5 - OHT 8 - OHP	**Review of types of fields in Lotus Notes/ CMA documents** • Trainer introduces Worksheet 5 and clarifies purpose • Participants work individually to define terms in worksheet • Trainer checks answers and uses OHT 7 and 8 to review definitions	Individual work Trainer - Participants (whole group)	15
2	Relevant sections of CMA - Data show	**Application: types of fields** • Trainer briefly reviews/demonstrates types of fields in a case document • Participants practice utilizing/completing different types of fields in case documents Trainer monitors and provides help as necessary • Trainer reviews/demonstrates steps for manipulating characteristics of rich text fields Participants follow steps at their own computers • Participants practice manipulating rich text fields Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group)	30

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Activity Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
3	OHT 9 - OHP	**Introduction to action buttons, hotspots, sections and embedded views** • Trainer transitions by saying that participants will now look at some other features of Lotus Notes/CMA documents • Trainer uses OHT 9 to present the function of action buttons, hotspots, sections within documents and embedded views, unmasking one feature at a time	Trainer - Participants (whole group)	10
4	Relevant sections of CMA - Data show	**Demonstration: action buttons, hotspots, sections and embedded views** • Trainer demonstrates above features in a case document • Trainer demonstrates action buttons by pointing at "create party" and "confirm case" buttons at top of case document window and explaining/illustrating the function of each • Trainer demonstrates the function of a section within a document by showing the details section within a case document, clicking the little arrow and showing the details that appear • Trainer demonstrates the function of hotspots by pointing at "go to" and "new" hotspot buttons in defendant form and illustrating what each one does • Trainer demonstrates the function of an embedded view by showing the parties and events embedded view within a case document, clicking it to show the forms that appear within Trainer draws the analogy with the view pad/panel under different views showing that embedded views work in the same way but within a document • Trainer ends this demonstration by emphasizing that the different form elements and features observed so far enable a user to get all the data and forms/details related to a given case from one case document • Trainer fields questions	Trainer - Participants (whole group)	20
5	Relevant sections of CMA - Data show	**Application: using action buttons, hotspots, sections and embedded views** • Participants practice using action buttons, hotspots, sections and embedded views in case documents • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	15
6	User's Manual pages 14-19	**Home assignment** • Trainer asks participants to review pages 14-19 of the User's Manual and note questions to ask the trainer on the next day	Trainer - Participants (whole group)	N/A

REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide

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OHT 9

MORE FEATURES OF LOTUS NOTES AND CMA DOCUMENTS

Action button	This appears at the top of a window or view. Users press to perform certain operations such as starting or confirming a document.
Hotspot	This appears within a document. Users press this button to perform operations like going to another list.
Section	This is a section within a document. By pressing the little arrow, users reveal the section and get additional data or details.
Embedded view	This is a view within a document. It enables users to view, open and edit other documents.

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WORKSHEET 5
LOTUS NOTES: MORE TERMS AND DEFINITIONS

Look at the following Lotus Notes terms about fields and document features What does each one mean? What is its function in Lotus Notes and the CMA?

Date field ______________________________
____

Rich text field ______________________________
____

Dialogue list ______________________________
____

Choice button ______________________________
____

Computed field ______________________________
____

Action button ______________________________
____

Hotspot ______________________________
____

Embedded view ______________________________
____

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DAY 4
SESSION 1: INTRODUCTION TO LOTUS MAIL
SESSION PLAN

Session Aims	• To introduce participants to the basic features of Lotus Mail • To familiarize participants with the basic steps for accessing mail from their inbox, recognizing read versus unread mail, compose new mail messages and send mail • To enable participants to assess the Lotus Mail section of the CMA User's Manual
Behavioral Objective(s) Supported	• 8.2 Use basic features of Lotus Notes Mail to communicate case events to CMA users, given a pending event or a schedule of events, with a high degree of ease, confidence and accuracy • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Select recipients of mail from the CMA Address Book • Send mail • Receive mail and recognize old versus new (unread) mail • Read mail • Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Basic features and operations of Lotus Mail
Materials	• User's Manual pages 20-21

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Flipchart - Board	**Warming up** • Trainer writes "electronic mail" on the flipchart/ whiteboard • Trainer elicits from the participants what they think they can do with electronic mail and why it is useful	Trainer - Participants (whole group)	5
2	Relevant sections of Lotus Mail - Data show	**Introduction and demonstration: accessing received mail** • Trainer transitions by saying that the participants will now observe the basic features and uses of Lotus Mail • Trainer demonstrates accessing personal mail database by clicking the icon on the Lotus workspace window (left hand side) • Trainer explains the function of the mail inbox outbox, drafts folder and trash • Trainer demonstrates accessing received mail by going to the inbox and clicking to reveal messages • Trainer explains the difference between red versus black fonts to indicate unread/new versus read mail	Trainer - Participants (whole group)	25

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer opens old mail for participants to view (good luck message sent by technical assistance staff/trainer to arrange beforehand) • Trainer opens new mail for participants to view/read (how is the training going message sent by technical assistance staff/trainer to arrange beforehand) • Trainer fields questions Repeat steps if necessary to clarify any difficult points		
3	Relevant sections of Lotus Mail - Data show - Participant PCs	Initial practice: accessing and reading mail • Participants follow trainer's instructions, seen on the screen/data show. • Participants access own mailbox/database from Lotus Notes workspace • Participants open and read mail that the trainer sent them (trainer to send mail asking participants about their impression of the training so far, this has to be done ahead of the session) • Trainer fields questions	Trainer - Participants (whole group) Individual practice	20
4	Relevant sections of Lotus Mail - Data show	Introduction and demonstration: composing and sending mail • Trainer demonstrates steps for opening a new mail message using "New Memo" button • Trainer demonstrates steps for selecting recipients of mail from the CMA Address Book • Trainer explains types of recipient (to, cc, bcc) • Trainer demonstrates writing the subject of the mail message and explains its function for the recipient • Trainer demonstrates steps for composing mail message and sending it by clicking the "Send" button (Trainer to compose a message for the participants and send it to the whole group)	Trainer - Participants (whole group)	15
5	Relevant sections of Lotus Mail - Data show - Participant PCs	Initial practice: composing and sending mail • Participants follow trainer's instructions to open a new memo and write/send the message to all participants (whole user group from the CMA Address Book). • Trainer fields questions	Trainer - Participants (whole group) Individual practice	25

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DAY 4
SESSION 2: APPLICATION: USING LOTUS MAIL
SESSION PLAN

Session Aims	• To enable participants to access mail from their inbox • To enable participants to recognize read versus unread mail • To enable participants to use the address book • To enable participants to compose new mail messages • To enable participants to reply to mail • To enable participants to attach documents to mail • To enable participants to forward or delete mail • To enable participants to assess the Lotus Notes section of the CMA User's Manual.
Behavioral Objective(s) Supported	• 8.2 Use basic features of Lotus Notes Mail to communicate case events to CMA users, given a pending event or a schedule of events, with a high degree of ease, confidence and accuracy • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Select recipients of mail from the CMA Address Book • Send mail • Receive mail and recognize old versus new (unread) mail • Read mail • Reply to mail • Forward or delete mail • Attach documents to mail • Utilize the User's Manual to address questions and problems with Lotus Notes operations for the CMA
Content to be Covered	• Basic features and operations of Lotus Mail • Review of the Lotus Notes section of the CMA User's Manual
Materials	• User's Manual pages 20-21 • Review of User's Manual pages 5-21

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Participant PCs	**Hands-on practice: accessing, reading and composing mail** • Participants review steps from before the break to access and read the mail messages they had sent to each other. • For review purposes, trainer elicits the significance of red versus black fonts in the mail messages in the participants' inbox • Participants write/send new message to a single user/participant, then to more than one (using to, cc and bcc functions) • Additional practice of accessing and reading received mail • Trainer monitors throughout and provides help as necessary	Individual practice	30

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	Relevant sections of Lotus Mail - Data show	**Introduction and demonstration: responding to mail** • Trainer demonstrates steps for responding to mail messages. Trainer explains the functions of the "reply" "reply with history" "reply to all" and "reply to all with history" choices • Trainer demonstrates sending replies by clicking the "send" button • Trainer fields questions	Trainer - Participants (whole group)	10
3	Participant PCs	**Hands on practice: responding to mail messages** • Participants follow trainer's steps to respond to each other's messages. Participants try using the different reply choices available • Trainer monitors and provides help as necessary	Individual practice	10
4	Relevant sections of Lotus Mail - Data show - Participant PCs	**Demonstration and practice: attaching documents to mail messages** • Trainer demonstrates steps for attaching documents to mail messages using the "attach" icon • Trainer repeats steps for clarity if necessary • Participants follow trainer's steps at their own computers, attaching documents to their own messages • Trainer fields questions	Trainer - Participants (whole group) Individual practice	10
5	Relevant sections of Lotus Mail - Data show	**Introduction and demonstration: forwarding and deleting received mail** • Trainer demonstrates steps for forwarding a received mail message to another user and reviews steps for selecting recipient addresses • Trainer explains purpose of the forwarding function in electronic mail • Trainer demonstrates steps for deleting mail messages by dragging to trash then deleting using F9, or dragging back out of trash to inbox • Trainer demonstrates deleting mail messages directly using the "delete" button, or pressing "delete" on the keyboard • Trainer fields questions	Trainer - Participants (whole group)	10
6	Participant PCs	**Hands-on practice: responding to, forwarding and deleting mail** • Participants practice responding to forwarding and deleting mail messages • Trainer monitors and provides help as necessary	Individual practice	20
7	User's Manual pages 5-21	**Home assignment** • Trainer asks participants to review pages 5-21 of the User's Manual thus bringing the component on Lotus Notes in this training to closure	Trainer - Participants (whole group)	N/A

REMINDER: Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide
Remind participants to complete relevant sections of Worksheet 1

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DAY 5
SESSION 1: PREVIEW OF THE CMA CASE DATABASE
SESSION PLAN

Session Aims	• To review the main purpose and functions of the CMA • To introduce the participants to the main features and operations of the CMA Case Database its documents, fields, links and views.
Behavioral Objective(s) Supported	• Preparation for objectives 8.3 to 8.11 (see list of objectives on pages 6-9 of this Trainer's Guide)
Enabling Objective(s)	• N/A
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Preview of the CMA Case Database
Materials	• OHT 4 (review, page 38 of this Trainer's Guide) • OHT 10 and 11 • Overview of User's Manual, pages 33-131

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	OHT 4 - OHP	Review of main components of the CMA • Trainer uses OHT 4 (see page 38 of this Trainer's Guide) again to elicit and review the main features and components of the CMA from day 1.	Trainer - Participants (whole group)	5
2	OHT 10 - OHP	Review of main features and functions of the CMA • Trainer elicits from participants what they think, from what they've seen so far, are the main functions of the CMA Trainer guides discussion towards points on OHT 10 • Trainer uses OHT 10 to present main features and functions of the CMA, unmasking and discussing one point at a time • Trainer fields questions	Trainer - Participants (whole group)	10
3	OHT 11 - OHP	Data and document flow in the CMA Case Database • Trainer transitions by saying that we will now preview each of the databases in the CMA to see the documents and data they contain, and their main functions and operations • Trainer uses OHT 11 to show the flow of data and documents from the moment a case is initiated to the moment it is closed in the CMA Case Database • Trainer highlights links between documents to clarify how the CMA integrates all the data and forms related to one case for ease of access and processing For example, trainer explains that the data in the party documents is linked to the main case document so that changes in the former are reflected in the latter • Trainer points out that this also facilitates data administration and case monitoring	Trainer - Participants (whole group)	15

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
4	Relevant sections of CMA - Data show	Demonstration: case and party data/documents in the Case Database • Trainer opens existing case document and flicks through data and linked documents/forms to show integrated entity and highlight ease of access • Trainer initiates new case document and enters minimum necessary details, eliciting some of the data from the participants • Trainer tries to confirm case and shows warnings when party documents/data have not been entered • Trainer creates related party documents (plaintiff and defendant) and enters minimum necessary details • Trainer selects attorney information from Representative Database (list of choices available within case document) • Trainer confirms case and then fields questions	Trainer - Participant s (whole group)	25
5	Relevant sections of CMA - Data show	Demonstration: event documents in the Case Database • Trainer demonstrates creating a new event form related to the case just created and confirmed Trainer highlights choices, and explains that the CMA system suggests possible events per case type, as well as the logical sequence of these events • Trainer highlights the difference between the symbols marking past versus pending events • Trainer refreshes case document and shows how event is now seen in related views (embedded and external) • Trainer shows how status bar at the bottom shows last user who modified the case document • Trainer fields questions	Trainer - Participant s (whole group)	10
6	Relevant sections of CMA - Data show - Printer	Introduction and demonstration: printing case documents • Trainer demonstrates printing final case forms from the CMA Case Database, highlighting the difference between that and the editable form, and between using the print button in the CMA and selecting "print" from the file menu	Trainer - Participant s (whole group)	5
7	Relevant sections of CMA - Data show	Review of the different views in the Case Database • Trainer shows different classifications of documents in the different views of the CMA Case Database • Trainer allows participants some time to observe the basic characteristics and functions of the Case Database • Trainer fields questions	Trainer - Participant s (whole group)	20

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OHT 10

KEY FEATURES AND FUNCTIONS OF THE CMA

- Provides a high technology solution for case processing and management.
- Allows users to store and retrieve case-related data and forms.
- Integrates all data and forms related to one case in a single case document or record.
- Allows users to track case progress by monitoring past and pending events of the case, and monitoring changes in case status.
- Provides case-related statistical breakdowns and tracking systems under different database views.
- Allows users to print case forms and reports by generating them in their final form from the different databases.

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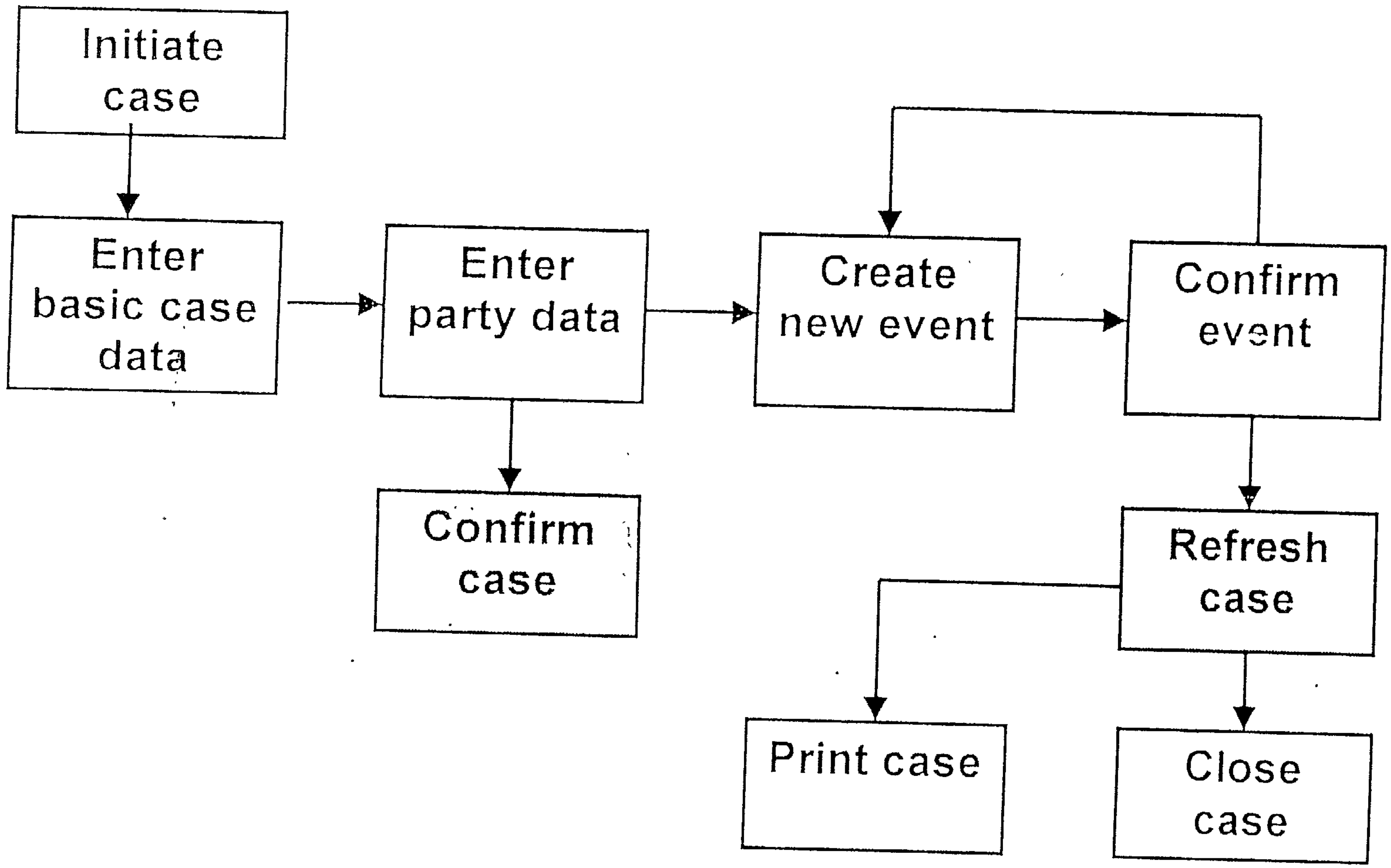
OHT 11

DATA AND DOCUMENT FLOW IN THE CMA CASE DATABASE



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DAY 5
SESSION 2: PREVIEW OF THE CMA REPRESENTATIVE AND ADMINISTRATION/LOG DATABASES
SESSION PLAN

Session Aims	• To introduce the participants to the main features and operations of the CMA Representative Database its documents, fields, links and views • To introduce the participants to the main features of the CMA Administration/Log Database
Behavioral Objective(s) Supported	• Preparation for objective 8.12 (see list of objectives on pages 6-9 of this Trainer's Guide)
Enabling Objective(s)	• N/A
Content to be Covered	• Preview of the CMA Representative Database • Preview of the CMA Administration/Log Database
Materials	• Overview of User's Manual pages 133-149, and pages 22-32

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Flipchart - Board	Lead in: the CMA Representative Database • For review purposes, trainer elicits from the participants the three databases that constitute the CMA • Trainer transitions by saying that, having previewed the CMA Case Database, we will now move on to the Representative Database • Trainer elicits from participants what the purpose/main function of this database is • Trainer elicits from participants what data they think will be included in attorney forms (review from day 1, session 2, Worksheet 3) • Trainer makes notes of important attorney data on flipchart or whiteboard	Trainer - Participants (whole group)	10
2	Relevant sections of CMA - Data show	Demonstration: the CMA Representative Database • Trainer opens database and brings up views • Trainer shows the different types of views in the Representative Database (see Chapter 11 of the User's Manual) • Trainer shows types of data under each view in the Representative Database • Trainer opens an existing representative document and shows types of fields/data • Trainer creates a new representative document and elicits data from participants to complete form • Trainer highlights link between representative form and party forms in the Case Database, and reviews operation for selecting an existing attorney's details if he is working with the case in question	Trainer - Participants (whole group)	45

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer allows participants time to observe the main characteristics and functions of the Representative Database at their computers • Trainer fields questions		
3	N/A	Lead in: the CMA Administration/Log Database • Trainer briefly explains the function of this database for system administrators to monitor the operations of the CMA system on a daily basis, and address system problems • Trainer clarifies to participants that this training will not focus on this database, since it concerns system administrators Trainer explains that they will briefly preview the database for an overall idea of its role in the CMA This database is the focus of another training program specifically designed for CMA system administrators	Trainer - Participants (whole group)	10
4	Relevant sections of CMA - Data show	Demonstration: the CMA Administration/Log Database • Trainer opens database and reveals Log Entry view • Trainer shows type of system information under this view • Trainer opens log form and shows details in the various fields explaining the purpose of each one for system administration • Trainer demonstrates the use of the 'go to corresponding document' action button and explains purpose • Trainer ends demonstration by briefly explaining the role of the system administrator in the CMA, especially for assigning data access limits to different users, for correcting certain types of data, and for tracking changes made by users and maintaining original and changed/edited data • Trainer fields questions	Trainer - Participants (whole group)	25
REMINDER. Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide				

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DAY 6
SESSION 1: INTRODUCTION: CREATING CASE DOCUMENTS
SESSION PLAN

Session Aims	• To create case documents that the participants will work with during different application sessions • To familiarize participants with steps for creating and completing new case documents in the CMA Case Database • To familiarize participants with steps for creating party documents from within the case document and enter party data • To familiarize participants with steps for creating/choosing representative documents from within the case document • To familiarize participants with steps for confirming, saving and closing case documents
Behavioral Objective(s) Supported	• 8.3 Create case documents using the CMA Case Database given case-related data, with a high degree of accuracy
Enabling Objective(s)	• Initiate a case document • Enter case details • Enter party data (for single-party and multiple-party cases) • Transfer data from party documents to case documents • Select or enter a case number • Confirm, save and close case documents
Content to be Covered	• Steps for creating a new case document and related forms, and for confirming and saving case documents
Materials	• Worksheet 6 • User's Manual pages 33-59

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	**Lead in: creating case documents** • Trainer introduces session by clarifying main aims of session • Trainer introduces the concept of data sensitivity/security with real cases, and its relationship to this component of the training • Trainer explains to participants that they will create their own "cases", and use those to enter data into the CMA, for trialing purposes	Trainer - Participants (whole group)	5 minutes
2	Relevant sections of CMA Data show	**Demonstration: creating new case documents in the CMA Case Database** • Trainer demonstrates steps for creating new case and entering basic data • Trainer attempts to confirm case at this stage and shows participants warning regarding the need to have created party documents before attempting to confirm a case	Trainer - Participants (whole group)	60

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer demonstrates entering party data from within the case document • Trainer demonstrates entering representative data from within the case document • Trainer explains that the participants will get extensive practice in creating party and representative documents in later components of the course but that they are going through the basic steps right now in order to complete the new case document and be able to confirm/save it • Trainer demonstrates steps for transferring party names from the party documents to the case document (computing party names in the case document) • Trainer demonstrates the steps for confirming and saving a case document • Trainer fields questions (both at this stage and at appropriate points throughout demonstration) • Throughout this demonstration, the trainer will follow the detailed steps in the User's Guide, pages 29-52		
3	Worksheet 6	Preparing case data for application • Trainer introduces worksheet 6, clarifying purpose and activity • Participants work in pairs to complete the case data required in the worksheet Participants may opt to use real or imaginary data • Trainer monitors activity and provides steps as necessary • Trainer explains to participants that they will use their worksheets to enter case data into the CMA Case Database after the break	Trainer - Participants (whole group) Pair work	25

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DAY 6
SESSION 2: APPLICATION: CREATING CASE DOCUMENTS
SESSION PLAN

Session Aims	• To enable the participants to create and complete new case documents in the CMA Case Database • To enable the participants to create party documents from within the case document and enter party data • To enable the participants to choose representative documents from within the case document • To enable the participants to confirm, save and close case documents • To familiarize the participants with the relevant section of the CMA User's Manual and the steps presented for creating a new case document
Behavioral Objective(s) Supported	• 8.3 Create case documents using the CMA Case Database, given case-related data, with a high degree of accuracy • 8.14 Address questions and problems that arise while using the CMA databases given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Initiate a case document • Enter case details • Enter party data (for single-party and multiple-party cases) • Transfer data from party documents to case documents • Select or enter a case number • Confirm, save and close case documents • Utilize the User's Manual to address questions and problems with case documents
Content to be Covered	• Steps for creating a new case document and related forms, and for confirming and saving case documents
Materials	• Worksheet 6 (from day 6/session 1) • User's Manual pages 33-59

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Worksheet 6 - Relevant sections of CMA - Data show - Participant PCs	Application: creating a new case document and entering case details • Trainer reviews steps for creating and confirming a new case, eliciting data and steps from participants as he/she goes along and entering it into the database • Participants follow trainer's instructions and steps in User's Manual, pages 33-59, to create a new case document and enter case details. They enter data from Worksheet 6. • Trainer monitors and provides help as necessary • Trainer fields questions then elicits what the participants will do next (guides them towards the response "enter party data")	Trainer - Participants (whole group) Individual work	35
2	Worksheet 6 - Participant PCs	Application: entering party data • Participants follow trainer's instructions and steps in User's Manual pages 43-50 to create plaintiff and defendant forms from within the case document and enter party details. They enter data from Worksheet 6 • Trainer monitors and provides help as necessary	Individual work	20

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer fields questions, then elicits what the participants will do next (guides them towards the response "enter representative data")		
3	Worksheet 6 - Participant PCs	Application: initial steps for entering representative data • Participants follow trainer's instructions and steps in User's Manual, pages 50-52, to enter/select representative data from within the case document • Trainer monitors and provides help as necessary • Trainer fields questions, then elicits what the participants will do next (guides them towards the response "transfer party names and data into main case document")	Individual work	15
4	Relevant sections of CMA - Data show - Participant PCs	Application: computing party names and data in the case document • Trainer recaps steps for transferring party names and data into case documents • Participants follow trainer's instructions, and the steps in the User's Manual pages 53-54, to transfer party names and data into their case documents • Trainer fields questions, then elicits what the participants will do next (guides them towards the response "confirm and save case")	Trainer - Participants (whole group) Individual work	10
4	Relevant sections of CMA - Data show - Participant PCs	Application: confirming and saving case documents • Participants follow trainer's instructions and steps in User's Manual, pages 53-59, to confirm and save the case document • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	10
5	User's Manual pages 29-52	Home assignment and preparation for Day 7 • Trainer asks participants to review pages 33-59 from the User's Manual and note any questions to ask the trainer on the next day • Trainer gives participants the option to bring with them actual case files from closed cases to enter into the CMA Case Database, thus allowing them to work with real data if possible	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide Remind participants to complete relevant sections of Worksheet 1				

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DAY 7
SESSION 1: INTRODUCTION: VIEWING AND WORKING WITH CASE DOCUMENTS
SESSION PLAN

Session Aims	• To review the steps for creating, completing, saving and confirming case documents and related forms (see day 6) • To familiarize participants with the different views in the CMA Case Database and explain the function of each • To familiarize participants with the steps for accessing case documents and related forms from different views. • To review the symbols used in the CMA to mark different types of case documents and related forms
Behavioral Objective(s) Supported	• 8.4 View case documents, given different sorting criteria and categories, with a high degree of ease, confidence and competence • 8.13 Conduct search operations in the various CMA Databases given a search item or criterion, with a high degree of ease, accuracy and speed • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• View cases categorized by case number • View cases categorized by subject. • View cases categorized by circuit • View pending/current cases categorized by year filed • View past/closed cases • Search for case documents by case number, subject or circuit number • Utilize the User's Manual to address questions and problems with case documents
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Review of steps for creating, completing, saving and confirming case documents • The different case views in the CMA Case Database
Materials	• Worksheet 7 • User's Manual pages 60-69 and pages 186-187

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Worksheet 7 Participant PCs	Review: creating cases • Trainer presents Worksheet 7 and clarifies purpose and task • Participants work through questions in Worksheet 7, answering each question by carrying out steps involved at their computers • Trainer monitors and provides help as necessary • By completing all the questions in Worksheet 7 participants will have entered a new case each into the CMA Case Database	Trainer - Participants (whole group) Individual work	40

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	N/A	Lead in: working with views in the CMA Case Database • Trainer transitions by saying that now participants will view all the case data they have entered into the CMA Case Database and work with this data • Trainer asks participants to follow steps of demonstrations in the CMA User's Manual, starting page 60	Trainer - Participants (whole group)	5

3	Relevant sections of the CMA - Data show	Demonstration: main views in the CMA Case Database
		• Trainer demonstrates the following views
		  • cases sorted by case number
		  • cases sorted by subject,
		  • cases sorted by circuit number,
		  • pending/current cases sorted by year filed/commenced,
		  • past/closed cases (see pages 186-187 of the User's Manual)
		• Trainer reviews the function of the symbols used to signify different types of documents
		• For each of the above views, trainer demonstrates the different types of documents included under the view in question, the relevant view sub-classifications, and the types of information provided in the view panel
		• Trainer fields questions after demonstrating each view
		• Trainer demonstrates steps for conducting search operations under different views using the sorting criterion of each view (number, subject or circuit number) to conduct the search
		• Trainer explains to the participants that they will work extensively with the different views after the break, and throughout the training
		• Throughout the demonstration the trainer will follow the steps presented in the User's manual, pages 60-69 and 186-187
			Trainer - Participants (whole group)	45

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WORKSHEET 7
REVIEW: STEPS FOR CREATING A CASE DOCUMENT

Answer each of the following questions by carrying out the step(s) involved in the question at your computer. At the end of this worksheet, you will have created a new case in the CMA Case Database

1 What action button does a user click to create a new case document?

____

2. What details does a user have to complete as a first step to creating a case document?

____

3 Where does the CMA system get data in order to complete the field "case type" in the case document?

____

4. What is the default value of the field "case status"?

____

5 What is the default value of the field "location of case file"? What does the user do to change this value?

____

6 What action button does the user click in order to create party forms?

____

7 Where does the CMA system get data for the representative of each party?

____

8 How can a user create a new representative document from within the case document?

____

9. How can the user transfer party names and data to the original case document?

____

10 How does a user confirm a case?

____

11 What happens if the user attempts to confirm a case before completing the related party documents/data?

____

12 What happens if a user attempts to save a case without having confirmed it?

____

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DAY 7
SESSION 2: APPLICATION: VIEWING AND WORKING WITH CASE DOCUMENTS
SESSION PLAN

Session Aims	• To review and reinforce the steps for creating completing, saving and confirming case documents and related forms • To enable participants to work with the different views in the CMA Case Database • To enable participants to access case documents and related forms from different views • To review the symbols used in the CMA to mark different types of case documents and related forms
Behavioral Objective(s) Supported	• 8.4 View case documents, given different sorting criteria and categories, with a high degree of ease, confidence and competence • 8.13 Conduct search operations in the various CMA Databases, given a search item or criterion, with a high degree of ease, accuracy and speed • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User s Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• View cases categorized by case number • View cases categorized by subject. • View cases categorized by circuit • View pending/current cases categorized by year filed • View past/closed cases • Search for case documents by case number, subject or circuit number • Utilize the User's Manual to address questions and problems with case documents
Content to be Covered	• Review of steps for creating, completing, saving and confirming case documents • The different case views in the CMA Case Database.
Materials	• CMA User's Manual pages 60-69 and pages 186-187 • Real case files from closed cases, brought by participants to the training (if any)

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show - Participant PCs	Application: working with views in the Case Database • Trainer repeats demonstration of different case views in the Case Database, per view • Participants follow trainer's instructions and steps in User's Manual, pages 60-69 and pages 186-187, to work with different views in the Case Database and observe first-hand the document classification and information provided under each view • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	45

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	Participant PCs - Case files or data created by participants	**Application and reinforcement: creating case documents** • Participants use real case files or create imaginary case data (see Worksheet 6 for a model) to create case documents and related party/representative data in the CMA Case Database • Trainer monitors and provides help as necessary	Individual work	35
3	Participant PCs	**Further practice: working with case views** • Trainer asks participants to use the different work views to look for summary data related to the new cases they entered in this session • Participants practice conducting search operations for different case documents by number subject and circuit number under the different case views • Trainer monitors and provides help as necessary	Individual practice	10
4	User's Manual pages 60-69 and 186-187	**Home assignment** • Trainer asks participants to review pages 60-69 and 186-187 of the User's Manual and note any questions to ask the trainer on the next day	Trainer - Participants (whole group)	N/A

REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide

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DAY 8
SESSION 1: INTRODUCTION: EDITING AND PRINTING CASE DOCUMENTS
SESSION PLAN

Session Aims	• To familiarize participants with steps for editing case documents • To familiarize participants with the function of refreshing case documents • To familiarize participants with steps for editing party documents from within case documents • To familiarize participants with steps for updating case status • To familiarize participants with steps for printing case labels and case-related forms
Behavioral Objective(s) Supported	• 8.5 Edit and update case status in existing case documents, given case number details and new status, with a high degree of accuracy • 8.6 Print case documents, given completed case details and forms, with a high degree of competence • 8.14 Address questions and problems that arise while using the CMA databases given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Open and edit an existing case document • Open and edit party documents from an existing case • Update case status • Print case labels • Convert case documents to print form • Print case forms and documents • Switch between the non-editable print version and the editable full version of a case document • Utilize the User's Manual to address questions and problems with case documents
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Editing cases • Printing case documents
Materials	• CMA User's Manual pages 70-79

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Lead in editing and printing cases • Trainer introduces aims underlying session, and connects it to previous sessions where participants created case documents and entered data. Now, they will edit and print this data	Trainer - Participants (whole group)	5
2	Relevant sections of the CMA - Data show	Demonstration: editing and refreshing existing case documents • Trainer selects cases and opens them (different methods) • Trainer demonstrates steps for accessing editable version of case document ("edit" from menus, "edit case" action button within case document, and double clicking case document after it opens in read only mode). Trainer points out that different users may choose the method that they feel most comfortable with	Trainer - Participants (whole group)	20

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer makes one or two edits in a case document • Trainer demonstrates different methods for refreshing a case document (F9 or "refresh" icon). • Trainer fields questions • Trainer explains to participant that they will receive extensive practice in editing case documents after the break • Throughout demonstration, trainer follows steps presented in the User's Manual, pages 70-73		
3	Relevant sections of the CMA - Data show	Demonstration: editing party documents from within a case document • Trainer demonstrates accessing party documents from within case document (review) • Trainer makes a few edits in party documents (e g telephone number) • Trainer again demonstrates refreshing case document to reflect changes made in party documents • Trainer demonstrates steps for changing party names and repeating procedure for computing value in party fields in the main case document • Trainer fields questions	Trainer - Participants (whole group)	25
4	Relevant sections of the CMA - Data show	Demonstration: updating case status • Trainer demonstrates steps for updating case status • Trainer explains restrictions to updating case status (p 73) • Trainer fields questions	Trainer - Participants (whole group)	15
5	Relevant sections of the CMA - Data show - Printer	Demonstration: printing case documents • Trainer explains concept of case labels • Trainer demonstrates steps for printing case labels • Trainer demonstrates switching between print version and full version of the case document • Trainer prints several case documents and circulates them to participants for their reference/review • Trainer fields questions • Throughout demonstration, trainer follows steps presented in the User's Manual, pages 74-79	Trainer - Participants (whole group)	25

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DAY 8
SESSION 2: APPLICATION: EDITING AND PRINTING CASE DOCUMENTS
SESSION PLAN

Session Aims	• To enable participants to edit case documents • To enable participants to refresh case documents • To enable participants to edit party documents from within case documents • To enable participants to update case status • To enable participants to print case labels and case-related forms
Behavioral Objective(s) Supported	• 8.5 Edit and update case status in existing case documents, given case number, details and new status, with a high degree of accuracy • 8.6 Print case documents, given completed case details and forms, with a high degree of competence • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Open and edit an existing case document • Open and edit party documents from an existing case • Update case status • Print case labels • Convert case documents to print form • Print case forms and documents • Switch between the non-editable print version and the editable full version of a case document • Utilize the User's Manual to address questions and problems with case documents
Content to be Covered	• Editing cases • Printing case documents
Materials	• Ongoing Training Assessment Form • CMA User's Manual pages 70-79

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show - Participant PCs	Application: editing and refreshing case documents • Trainer briefly demonstrates three methods for converting a case document from "read only" to "edit" mode Participants follow steps at their computers • Trainer briefly reviews steps for editing saving and refreshing case documents • Trainer sets up application task by asking each participant to open and edit the case documents he/she had created on the previous days • Participants follow trainer's instructions and steps in User's Manual, pages 70-73, to edit and refresh own case documents • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	25

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	Relevant sections of CMA - Data show - Participant PCs	**Application: editing party documents from within case documents** • Trainer briefly reviews/demonstrates steps for editing party documents from within a case document • Trainer demonstrates steps for refreshing case document to reflect changes or repeating procedure to transfer/compute party names and data into the main case document. • Trainer sets up application task by asking participants to open and edit the party documents related to the cases they had created on the previous days • Participants follow trainer's instructions and steps in User's Manual, pages 70-73, to edit and refresh own party documents • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	30
3	Relevant sections of CMA - Data show - Participant PCs	**Application: printing case documents** • Trainer briefly reviews/demonstrates steps for printing case labels • Trainer sets up application task by asking participants to print case label for own case documents and add the case labels to their training files • Trainer briefly reviews/demonstrates steps for converting a case document to print version and printing final form • Participants follow trainer's instructions and steps in User's Manual, pages 74-79, to print own case documents and add them to their training files • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	20
4	On-going Training Assess-ment Form	**Administration of ongoing training and assessment** • Trainer distributes Ongoing Training Assessment Form and clarifies purpose • Participants complete and hand in training assessment	Trainer - Participants (whole group) Individual assessment	15
5	User's Manual pages 60-69	**Home assignment** • Trainer asks participants to review pages 60-69 of the User's Manual and note any questions to ask the trainer on the next day	Trainer - Participants (whole group)	N/A

REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide
Remind participants to complete relevant sections of Worksheet 1.

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CMA DATA ENTRY TRAINING
ONGOING TRAINING ASSESSMENT FORM

Please assess the CMA Data Entry training so far. Your assessment will greatly contribute to the quality of the training.

Use the following rating scale to assess each of the items below.

4 Fully agree
3 Usually agree
2 Sometimes disagree
1 Disagree completely

Use a check mark (√) to indicate your rating for each item

	4	3	2	1
a) Each training session has a clear aim and focus				
b) The content in each training session is suitable with regard to the time available.				
c) The training makes the technical aspects of the CMA clear.				
d) There is an adequate balance of presentation on the part of the trainer and practice on the part of the participants.				
e) There is sufficient use of visual and other training aids to make the concepts underlying the training accessible.				
f) The training starts and ends on time.				
g) The training venue is well equipped				
h) There is adequate technical support throughout the training sessions to address any technical problems with the computers or the software				
i) The trainer uses effective training methods to suit the participants' learning needs.				
j) The trainer gives sufficient examples.				
k) The trainer has good rapport with the participants.				
l) The trainer provides ample opportunities for participants to ask questions				

What, in your opinion, would make this training more effective?

____

____

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DAY 9
SESSION 1: INTRODUCTION: CREATING EVENTS IN THE CMA CASE DATABASE
SESSION PLAN

Session Aims	• To familiarize participants with CMA features for handling case events • To introduce participants to the two methods for creating new events from within a case document, or from case views • To familiarize participants with the types of fields in event documents • To familiarize participants with the different event forms in the CMA Case Database • To familiarize participants with steps for confirming events • To familiarize participants with the process for notifying other CMA users of case events, and enable them to access received event notifications • To demonstrate the use of the CMA for sharing information about case details and events
Behavioral Objective(s) Supported	• 8.7 Create and confirm events, given case details and event schedules/written notifications with a high degree of accuracy
Enabling Objective(s)	• Create an event from a case document • Create an event from a view • Attach documents to case events • Access the full case document from an event document • Confirm an event. • Notify users of an event • Save and close an event document
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • How the CMA system handles case events • Creating events in the CMA Case Database • Types of events in the Case Database • Confirming events • Notifying CMA users of case events
Materials	• OHT 12 • CMA User's Manual pages 81-99

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Lead in: case events • Trainer elicits from participants the definition and importance of events in the CMA (review from day 1)	Trainer - Participants (whole group)	5
2	OHT 12 - OHP	Introduction: how the CMA handles case events • Trainer uses OHT 12 to discuss the features of the CMA system in handling case events, unmasking one point at a time • Trainer fields questions	Trainer - Participants (whole group)	10
3	Relevant sections of CMA - Data show	Introduction and demonstration, creating event documents • Trainer demonstrates steps for creating an event document from within a case document, using action button "create event" in action bar	Trainer - Participants (whole group)	30

Activity-Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer highlights the function of the dialogue list providing users with a logically sequenced list of events per case type • Trainer demonstrates completing the fields for one event type (of type "document"), explaining the types of fields and the data to be used • Trainer highlights the CMA system's potential in computing several fields in the event document from data already entered in the related case and party documents • Trainer demonstrates attaching another document or file to an event document (both for attaching external documents by using the "attach document" hotspot, or for attaching CMA-specific documents by using document links from menus) • Trainer demonstrates creating a new event document from views, using action button "create event" • Trainer demonstrates accessing a case document from within the event document attached to it • Trainer demonstrates saving an event and highlights the entry that appears in the embedded view of the related case document, and in the different views of the Case Database Trainer highlights the symbol used for pending events, as opposed to past events • Trainer fields questions and explains that participants will receive extensive practice in creating events after the break • Trainer follows the steps presented in the User's Manual, pages 81-99		
4	Relevant sections of CMA - Data show - Worksheet 13	Introduction and demonstration: types of event documents in the CMA system • Trainer goes through the types of event documents available to users in the CMA system, briefly explaining the fields and types of data in each • Trainer directs participants to relevant pages in User's Manual explaining the different types of events in the CMA • Trainer fields questions	Trainer - Participants (whole group)	15
5	Relevant sections of CMA - Data show	Introduction and demonstration: confirming an event • Trainer demonstrates steps for confirming events highlighting necessary data that must be available for an event to be confirmed. • Trainer completes operation and shows change in symbol in the embedded view in the related case document • Trainer fields questions	Trainer - Participants (whole group)	10

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
6	Relevant sections of CMA - Data show	**Introduction and demonstration: notifying CMA users of case events; refreshing event documents** • Trainer demonstrates steps for sending mail to users to notify them of case events • Trainer sends event notification to all participants (whole user group in CMA Address Book) as well as to himself/herself (to be able to access mail later on and demonstrate steps to participants) • Trainer reviews with participants the steps for accessing received mail and accesses event notification from own inbox. Trainer opens attachment and brings up relevant event form • Participants follow trainer's instructions to access new event notification from their inbox. • Trainer fields questions	Trainer - Participants (whole group) Individual work	20

NOTES:

OHT 12

HOW DOES THE CMA DEAL WITH CASE EVENTS?

- It allows users to create event documents for a case, enter event data and edit data.
- It provides users with a list of possible events per case type, sequenced logically and chronologically.
- It suggests to users the next event to complete per case type, and allows them to choose a different event.
- It classifies all case events as past or pending events, which facilitates monitoring case progress.
- Past and pending events are sub-classified in different views.
- Event views provide statistical breakdowns to track the execution of steps and their turnaround.
- Users can notify each other of case events using electronic mail.

INTERCOM ENTERPRISES

DAY 9
SESSION 2: APPLICATION: CREATING EVENTS IN THE CMA CASE DATABASE
SESSION PLAN

Session Aims	• To enable participants to use the two methods for creating new events from within a case document, or from case views • To enable participants to complete the types of fields in event documents • To familiarize participants with the different event forms in the CMA Case Database • To enable participants to use the steps for confirming events • To enable participants to notify other CMA users of case events
Behavioral Objective(s) Supported	• 8.7 Create and confirm events, given case details and events schedules/written notifications, with a high degree of accuracy
Enabling Objective(s)	• Create an event from a case document • Create an event from a view • Attach documents to case events. • Access the full case document from an event document • Confirm an event • Notify users of an event • Save and close an event document
Content to be Covered	• How the CMA system handles case events • Creating events in the CMA Case Database • Types of events in the Case Database • Confirming events • Notifying CMA users of case events
Materials	• CMA User's Manual pages 81-99

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show - Participant PCs	Application: creating and saving event documents • Trainer repeats steps for creating an event document of type "document". • Participants follow trainer's instructions and steps in User's Manual to create an event of type "document" for one of the cases they had entered during the previous training days • Participants save event document. • Participants refresh case document • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	15
2	Relevant sections of CMA - Data show Participant	Application: confirming an event • Trainer repeats steps for confirming an event and highlights change in event symbol/significance	Trainer - Participants (whole group) Individual	10

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
	PCs	• Participants follow trainer's instructions and steps in User's Manual to confirm the event document they created in the previous activity and change its status to past event • Participants refresh case document • Participants access embedded view in case document and observe change in event symbol to accompany change of status • Trainer monitors and provides help as necessary • Trainer fields questions	work	
3	Relevant sections of CMA - Data show - Participant PCs	Further practice: creating and confirming events • Participants repeat steps from activities 1 and 2 to create three or four more events for the cases they had entered on day 5 Participants complete different types of event documents, referring to relevant sections of the User's Manual for guidance as necessary • Participants save event documents • Participants confirm one or two of the new events • Participants refresh case document • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	45
4	Relevant sections of CMA - Data show - Participant PCs	Application: Notifying CMA users of events • Participants follow trainer's instructions and steps in User's Manual to notify each other of one or two of the new events they created (one participant notifies one other participant) • Participants access received mail notification • Participants review steps for responding to mail • Participants respond to senders of event notifications • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	20
5	User's Manual pages 71-88	Home assignment • Trainer asks participants to review pages 81-99 and note any questions they might want to ask the trainer on the next day	Trainer - Participants (whole group)	N/A

REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide

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DAY 10
SESSION 1: INTRODUCTION: VIEWING PAST AND PENDING EVENTS
SESSION PLAN

Session Aims	• To familiarize participants with the different classifications of past event documents and related details/statistics under different views • To familiarize participants with the different classifications of pending events and related details/statistics under different views • To familiarize participants with the case monitoring function of different event views
Behavioral Objective(s) Supported	• 8.8 View past and pending events, given different sorting criteria and categories, with a high degree of ease, confidence and competence
Enabling Objective(s)	• View past events under different sorting criteria • View pending events under different sorting criteria • Use event views to monitor case progress
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Views for past events in the CMA • Views for pending events in the CMA • Monitoring function of event views
Materials	• CMA User's Manual pages 100-119

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show	**Introduction and demonstration: viewing past events** • Trainer reviews the importance of viewing and tracking case events, and pointing out how the CMA facilitates these tasks • Trainer demonstrates different views for past events in the navigation pad • Trainer clicks on each view and goes through types of documents and information classified under each view in the view pad • Trainer explains the parameters/sources of data that the CMA uses in order to calculate the statistical information under different views, and highlights the importance of accurate data entry into case documents in the first place in order for these statistical breakdowns to be valid/reliable • Trainer elicits from participants the purpose of providing this information • Trainer fields questions • Throughout demonstration, trainer follows steps and information in the Trainer's Guide pages 100-119	Trainer to Participants (whole group)	55

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Activity Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	Relevant sections of CMA - Data show	**Introduction and demonstration: viewing pending events** • Trainer demonstrates different views for pending events in the navigation pad • Trainer clicks on each view and goes through types of documents and information classified under each view in the view pad • Trainer elicits from participants the purpose of providing this information • Trainer fields questions • Trainer explains that participants will receive extensive information in using/working with event views after the break	Trainer to Participants (whole group)	35

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DAY 10
SESSION 2: APPLICATION: VIEWING PAST AND PENDING EVENTS
SESSION PLAN

Session Aims	• To enable participants to observe the different classifications of past event documents and analyze related details/statistics under different views • To enable participants to observe the different classifications of pending events, and analyze related details/statistics under different views • To familiarize participants with the monitoring function of different event views
Behavioral Objective(s) Supported	• 8.8 View past and pending events, given different sorting criteria and categories, with a high degree of ease, confidence and competence • 8.14 Address questions and problems that arise while using the CMA databases given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• View past events under different sorting criteria • View pending events under different sorting criteria • Use event views to monitor case progress • Utilize the User's Manual to address questions and problems with event documents
Content to be Covered	• Views for past events in the CMA • Views for pending events in the CMA • Monitoring function of event views
Materials	• Worksheet 8 • CMA User's Manual, pages 100-119

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Participant PCs - Worksheet 8, Part A	Application: viewing past events • Trainer introduces Worksheet 8 and clarifies task • Participants follow trainer's instructions and steps in User's Manual to view past event documents and information classified under different views • Participants use Worksheet 8 Part A to record the type of information provided under each event view • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	55
2	Participant PCs - Worksheet 8 Part B	Application: viewing pending events • Participants follow trainer's instructions and steps in User's Manual to view pending event documents and information classified under different views • Participants use Worksheet 8, Part B to record the type of information provided under each event view • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	35

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
	User's Manual pages 89-107	Home assignment • Trainer asks participants to review pages 100-119 of the User's Manual and note any questions they might want to ask the trainer on the next day	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide				

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WORKSHEET 8
ANALYSIS OF EVENT VIEW CATEGORIES IN THE CMA

A Go through the different views for past events For each view, use the following table to record this information.

- the view title;
- the types of documents classified under this view, and
- the information/statistics that the view provides.

VIEW TITLES FOR PAST EVENTS	TYPES OF DOCUMENTS SORTED UNDER EACH VIEW	TYPES OF INFORMATION AND STATISTICS PROVIDED UNDER EACH VIEW

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B · Go through the different views for pending events For each view use the following table to record this information
- the view title;
- the types of documents classified under this view. and
- the information/statistics that the view provides.

VIEW TITLES FOR PENDING EVENTS	TYPES OF DOCUMENTS SORTED UNDER EACH VIEW	TYPES OF INFORMATION AND STATISTICS PROVIDED UNDER EACH VIEW

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DAY 11
SESSION 1: INTRODUCTION: EDITING EVENTS
SESSION PLAN

Session Aims	• To familiarize participants with steps and operations for editing event documents • To review data entry operations in event documents
Behavioral Objective(s) Supported	• 8.9 Edit existing event documents given new event details and status with a high degree of accuracy
Enabling Objective(s)	• Open and edit events from the full case document. • Open and edit events from views • Update event status. • Save changes to event documents
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Editing events and refreshing documents
Materials	• CMA User's Manual, pages 120-123

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Lead-in: editing events • Trainer leads in by saying that, so far in the training, the participants have practiced creating and viewing events Today, they are going to become familiar with the steps for editing existing events and updating their status	Trainer to Participants (whole group)	5
3	Relevant sections of CMA - Data show	Demonstration: editing events and refreshing documents • Trainer demonstrates steps for opening existing event document and converting it from "read only" to editable mode from within a case document, and from views • Trainer demonstrates editing event documents, saving changes, refreshing related documents and views and printing event documents from menus • Trainer opens up case and event views and shows how changes in the data in event documents is reflected in the different views • Trainer shows participants data at the bottom of each event document capturing who made the last change in the document and when the change was made • Trainer fields questions • Trainer follows User's Manual, pages 120-123	Trainer to Participants (whole group)	50

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
3	Relevant sections of CMA - Data show	**Demonstration: editing data in different types of event documents** • Trainer repeats demonstration, editing different types of data in different event documents • Trainer uses this demonstration to review aspects like entering different types of data, updating event and case status on the basis of new data, attaching documents to events, and manipulating rich text fields to highlight/ emphasize data in the "notes" field of each event • Trainer fields questions	Trainer to Participants (whole group)	35

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DAY 11
SESSION 2: APPLICATION: EDITING EVENTS
SESSION PLAN

Session Aims	• To enable participants to use steps and operations for editing event documents • To provide participants with further practice in data entry operations in event documents
Behavioral Objective(s) Supported	• 8.9 Edit existing event documents given new event details and status with a high degree of accuracy • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Open and edit events from the full case document • Open and edit events from views • Update event status • Save changes to event documents • Utilize the User's Manual to address questions and problems with event documents
Content to be Covered	• Editing events and refreshing documents
Materials	• CMA User's Manual, pages 120-123

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Participant PCs	Application: editing events and refreshing documents • Trainer transitions by saying that participants will now edit some of the events they had created for their cases in previous sessions • Participants follow trainer's instructions and steps in User's Manual, pages 120-123, to edit event documents they had created, and refresh related documents and views • Participants print one event document each to add to their training file • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	45
2	Participant PCs	Further practice in working with event documents • Participants review, through application, steps for creating new event documents They create all the types of event documents for their case types Participants refer to relevant sections of the User's Manual as necessary • Participants edit event documents and refresh event/case status as necessary • Trainer monitors and provides help as necessary • Trainer fields questions	Individual work	45

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
	User's Manual pages 70-110	**Home assignment** • Trainer asks participants to review pages 80-123 in the User's Manual, thus bringing the section on events in the CMA to closure • In preparation for day 12, trainer asks participants to bring case files for closed cases with multiple parties for data entry purposes This will depend on whether or not participants opted for bringing actual case files for previous sessions in the training	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide Remind participants to complete relevant sections of Worksheet 1				

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DAY 12
SESSION 1: INTRODUCTION: PARTY DOCUMENTS
SESSION PLAN

Session Aims	• To review with participants the steps for creating case documents • To review with participants the steps for creating party documents • To familiarize participants with steps for creating multiple party documents per case (plaintiff, defendant and other, actual and virtual parties) • To enable participants to prepare case and party data for application tasks
Behavioral Objective(s) Supported	• 8.10 Create and view party/litigant documents, given party data, with a high degree of accuracy
Enabling Objective(s)	• Create new party forms for a case • Transfer attorney/representative data from the CMA Representative Database to party documents • Access the full case form from a party document
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Review of case documents • Creating party documents • Creating multiple parties (different types) for a case • Entering representative data from within party/case documents
Materials	• Worksheet 9 • CMA User's Manual page 124-125

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Lead in and review: party documents • Trainer explains aims of session and elicits from participants the methods for creating party documents (from within a case, or from views)	Trainer - Participants (whole group)	5
2	Relevant sections of CMA - Data show	Demonstration: creating case documents with multiple parties • Trainer reviews steps for creating a new case document, eliciting data from the participants for the different fields • Trainer demonstrates steps for creating party documents from within the case document, or from views • Trainer enters party data for multiple plaintiffs and defendants in the same case document (different types: actual and virtual parties, and parties of types other than plaintiffs and defendants - "other" party document) • Trainer selects attorney information for the various plaintiffs and defendants from the CMA System/Representative Database • Trainer reviews steps for creating a new representative document from within a party document	Trainer - Participants (whole group)	40

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer reviews procedure for transferring party data automatically to the main case document • Trainer confirms case document and demonstrates how multiple party names are entered and how the case name is computed • Trainer refreshes case document to show how the related party documents appear in the embedded view • Trainer saves and closes case document		
3	Worksheet 9	Preparing party data for application purposes • Trainer presents Worksheet 9 to participants, clarifying task • Participants work individually on creating case and party data to complete Worksheet 9 • Participants get together in pairs to compare cases and check that data is complete (pair a senior/experienced participant with a junior/inexperienced participant for transfer of skills) • Trainer indicates that participants will use their new case and party data after the break to enter data into the CMA Participants will also use any actual case files/data they have brought with them	Trainer - Participants (whole group) Individual work Pair work	45

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WORKSHEET 9
CASE DETAILS: MULTIPLE PARTIES

Think of a commercial case with multiple plaintiffs and defendants. Make notes to briefly describe your case in the following box

BRIEF CASE DESCRIPTION

Now complete the following details about your case

Type and subject of case ______________________

Date case was commenced. ______________________

Case number: ______________________

Circuit number: ______________________

Circuit days: ______________________

Court official responsible ______________________

Location of case file: ______________________

Original case court (for transferred cases only): ______________________

Name of plaintiff 1 (first, second, third and family name):

____

Type of ID ______________________

ID number: ______________________

National/social security number: ______________________

Legal status/bearing: ______________________

Complete address ______________________

Telephone number: ______________________

Attorney representing plaintiff: Choose attorney from existing list in the CMA Representative Database

Power of attorney (type and number) ______________________

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Name of plaintiff 2 (first, second, third and family name):

____

Type of ID ____________________
ID number ____________________
National/social security number: ____________________
Legal status/bearing: ____________________
Complete address: ____________________
Telephone number ____________________
Attorney representing plaintiff Choose attorney from existing list in the CMA Representative Database
Power of attorney (type and number) ____________________

....

Name of plaintiff 3 (first, second, third and family name):

____

Type of ID ____________________
ID number: ____________________
National/social security number ____________________
Legal status/bearing ____________________
Complete address: ____________________
Telephone number: ____________________
Attorney representing plaintiff: Choose attorney from existing list in the CMA Representative Database
Power of attorney (type and number): ____________________

....

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Name of defendant 1 (first, second, third and family name):

____

Type of ID: ______________________

ID number. ______________________

National/social security number: ______________________

Legal status/bearing: ______________________

Complete address: ______________________

Telephone number: ______________________

Attorney representing defendant Choose attorney from existing list in the CMA Representative Database

Power of attorney (type and number) ______________________

....

Name of defendant 2 (first, second, third and family name):

____

Type of ID: ______________________

ID number ______________________

National/social security number ______________________

Legal status/bearing ______________________

Complete address. ______________________

Telephone number. ______________________

Attorney representing defendant· Choose attorney from existing list in the CMA Representative Database

Power of attorney (type and number): ______________________

....

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Name of defendant 3 (first, second, third and family name):

____

Type of ID ______________________
ID number ______________________
National/social security number: ______________________
Legal status/bearing: ______________________
Complete address: ______________________
Telephone number: ______________________
Attorney representing defendant: Choose attorney from existing list in the CMA Representative Database
Power of attorney (type and number): ______________________

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DAY 12
SESSION 2: APPLICATION: CREATING MULTIPLE PARTY DOCUMENTS
SESSION PLAN

Session Aims	• To enable participants to review/use the steps for creating case documents • To enable participants to review/use the steps for creating party documents • To enable participants to use the steps for creating multiple party documents per case (plaintiff, defendant and other, actual and virtual parties) • To familiarize participants with CMA operations for entering party names in case documents and calculating party serial numbers • To familiarize participants with the relevant pages from the CMA User's Manual with regard to creating party documents.
Behavioral Objective(s) Supported	• 8.10 Create and view party/litigant documents, given party data, with a high degree of accuracy • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User s Manual as a reference tool with a high degree of confidence and accuracy
Enabling Objective(s)	• Create new party forms for a case • Transfer attorney/representative data from the CMA Representative Database to party documents • Access the full case form from a party document • Utilize the User's Manual to address questions and problems with party documents
Content to be Covered	• Review of case documents • Creating party documents • Creating multiple parties (different types) for a case • Entering representative data from within party/case documents
Materials	• Worksheet 9 • CMA User's Manual pages 124-125

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Worksheet 9 - Relevant sections of CMA - Data show - Participant PCs	Application: creating a new case document and entering case details • Participants follow trainer's instructions (and possibly refer to the User's Manual, as necessary) to create a new case document and enter case details They enter data from the cases they created in Worksheet 9 • Trainer monitors and provides help as necessary • Trainer demonstrates any problematic steps to ensure reinforcement • Trainer fields questions	Trainer - Participants (whole group) Individual work	15
2	Worksheet 9 - Relevant sections of CMA - Data show	Application: entering party data • Participants follow trainer's instructions and steps in User's Manual, pages 124-125, to create multiple plaintiff and defendant documents from within their new case document, and enter party details They enter party data from Worksheet 9	Trainer - Participants (whole group) Individual work	45

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
	- Participant PCs	• Trainer monitors and provides help as necessary • Trainer demonstrates any problematic steps to ensure reinforcement • Participants then go back to case document and select menu for completing party names and other data automatically in the case document • Participants observe CMA operations for calculating party serial numbers according to party type • Trainer fields questions, then elicits what the participants will do next (guide them towards the response "enter representative data")		
3	Worksheet 9 - Relevant sections of CMA - Data show - Participant PCs	Application: initial steps for entering representative data • Participants follow trainer's instructions and steps in User's Manual to enter/select representative data per party from within the case document • Trainer monitors and provides help as necessary • Trainer demonstrates any problematic steps to ensure reinforcement • Trainer fields questions, then elicits what the participants will do next (guide them towards the response "confirm and save case")	Trainer - Participants (whole group) Individual work	20
4	Participant PCs	Application: confirming and saving case documents • Participants confirm the case and save the case document • Trainer monitors and provides help as necessary • Trainer fields questions • If time, participants repeat activities 1-4 to enter data from the actual case files they have brought with them, or use this data instead of Worksheet 9	Individual work	10
5	User's Manual pages 124-125	Home assignment • Trainer asks participants to review pages 124-125 from the User's Manual and note any questions they might want to ask the trainer on the next day	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide				

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DAY 13
SESSION 1: INTRODUCTION: VIEWING AND EDITING PARTY DOCUMENTS
SESSION PLAN

Session Aims	• To familiarize the participants with the different views for party documents and the information provided under each view • To familiarize the participants with the steps for editing party documents from within a case document, or under views • To familiarize the participants with the steps for and importance of refreshing party documents • To familiarize the participants with the steps for saving, printing and closing party documents
Behavioral Objective(s) Supported	• 8.10 Create and view party/litigant documents, given party data, with a high degree of accuracy • 8.11 Edit existing party documents, given new party data and status, with a high degree of accuracy • 8.13 Conduct search operations in the various CMA Databases, given a search item or criterion, with a high degree of ease, accuracy and speed
Enabling Objective(s)	• Access the full case form from a party document • View party documents categorized by party name or by party ID • Edit a party document from a full case document • Open and edit a party document from views • Save changes to party documents • Print party documents • Search for party documents by name and by ID • Refresh case documents to reflect changes made to party documents
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Viewing party documents • Documents and information under different party views • Editing party documents from within a case document or from views • Refreshing, saving, printing and closing party documents
Materials	• CMA User's Manual pages 125-131

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show	**Introduction and demonstration: viewing party documents under different sorting criteria** • Trainer leads in by explaining the aims of the session, and drawing the analogy between viewing sorted party documents and viewing events or cases • Trainer demonstrates two main views for party documents in the navigation pad by name and by ID type/number • Trainer highlights each view and goes through the sorting criteria used and the type of information provided in the view pad under each view	Trainer - Participants (whole group)	40

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer demonstrates steps for conducting search operations for party documents under the different party views, by name and by ID • Trainer elicits from participants the use of such information (e g quick access to party documents if request is handed in by party name or ID). • Trainer fields questions • Trainer follows instructions and information on pages 125-131 of the User's Manual		
2	Relevant sections of CMA - Data show	**Introduction and demonstration: opening, editing refreshing, saving and closing party documents** • Trainer demonstrates opening party documents from within a case document (from the embedded view) • Trainer points out that a party document is opened in a read-only mode, and that the user then has to convert it to an editable form Trainer demonstrates different methods for converting to editable versions • Trainer then demonstrates opening a party document from party views (by name or ID type/number), and again shows steps for converting a read-only document to an editable document • Trainer makes edits in a party document, then demonstrates steps for refreshing document Trainer explains the importance of refreshing the document • Trainer edits a party name to show that changes are not reflected in main case document automatically or upon refreshing the case document Trainer demonstrates steps for transferring new party names into case document (repeating original steps for transferring/computing party names from menus) • Trainer demonstrates saving and closing party documents • Trainer fields questions	Trainer - Participants (whole group)	50

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DAY 13
SESSION 2: APPLICATION: VIEWING AND EDITING PARTY DOCUMENTS
SESSION PLAN

Session Aims	• To enable participants to analyze the sorting criteria and information provided under different views for party documents • To enable participants to use the steps for editing party documents from within a case document, or under views • To enable participants to use the steps for refreshing party/case documents • To enable participants to use the steps for saving printing and closing party documents • To enable participants to use the CMA User's Manual to resolve problems with party documents
Behavioral Objective(s) Supported	• 8.10 Create and view party/litigant documents, given party data with a high degree of accuracy • 8.11 Edit existing party documents given new party data and status, with a high degree of accuracy • 8.13 Conduct search operations in the various CMA Databases, given a search item or criterion, with a high degree of ease, accuracy and speed • 8.14 Address questions and problems that arise while using the CMA databases given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• Access the full case form from a party document • View party documents categorized by party name or by party ID • Edit a party document from a full case document • Open and edit a party document from views • Save changes to party documents • Print party documents • Refresh case documents to reflect changes made to party documents • Search for party documents by name and by ID • Utilize the User's Manual to address questions and problems with party documents
Content to be Covered	• Viewing party documents • Documents and information under different party views • Editing party documents from within a case document or from views • Refreshing, saving, printing and closing party documents
Materials	• CMA User's Manual pages 125-131

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show - Participant PCs	**Application: viewing party documents under different sorting criteria** • Participants follow trainer's instructions and steps in User's Manual, pages 125-131, to view party documents sorted first by party name and then by party ID (type/number), and analyze the type of information provided under each view • Participants practice searching for party documents under the different views by party name and ID	Trainer - Participants (whole group) Individual work	30

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer monitors and provides help as necessary • Trainer fields questions then briefly reviews with participants the potential uses and importance of sorted party data Trainer also highlights the importance of accurate data entry to ensure that information provided under views is accurate		
2	Relevant sections of CMA - Data show - Participant PCs	**Application: opening, editing refreshing, saving and closing party documents** • Participants follow trainer's instructions and steps in User's Manual to open, edit, refresh, save and close multiple party documents related to the case they created on day 12 • Participants practice switching from read-only mode to editable mode of party documents using different methods • Participants practice changing party names and legal status and then performing necessary operation to transfer/compute new party data into main case document • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	60
3	User's Manual pages	Home Assignment • Trainer asks participants to review pages 125-131 of the User's Manual, thus bringing the section on party documents to closure, and ending the component of the training on the CMA Case Database	Trainer - Participants (whole group)	N/A
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide Remind participants to complete relevant sections of Worksheet 1				

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DAY 14
SESSION 1: INTRODUCTION TO THE CMA REPRESENTATIVE DATABASE: CREATING REPRESENTATIVE DOCUMENTS
SESSION PLAN

Session Aims	• To introduce to the participants the main purpose and features of the CMA Representative Database • To encourage in the participants a positive attitude towards maintaining attorney data electronically • To familiarize the participants with the steps for creating a representative document • To familiarize the participants with the fields in the representative document. • To make participants aware of the role of the Representative Database in facilitating and expediting data entry into case documents,
Behavioral Objective(s) Supported	• 8.12 Utilize the CMA Representative Database, given attorney/representative data, with a high degree of ease, accuracy and competence
Enabling Objective(s)	• Create representative documents • Save and close representative documents • Use the Representative Database in relationship to party documents for data entry
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Steps for creating a representative document • Types of fields in a representative document • Requirements for saving and closing representative documents
Materials	• OHT 13 • CMA User's Manual pages 133-145

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	OHT 13 - OHP	**Introduction: purpose and main features of the CMA Representative Database** • Trainer uses OHT 13 to introduce the main purpose and features of the CMA Representative Database, highlighting types of data, ease of use and access, and links to case documents. Trainer unmasks one point on OHT at a time • Trainer discusses points with participants and fields any questions at this stage	Trainer - Participants (whole group)	25
2	Relevant sections of CMA - Data show	**Introduction and demonstration: creating a representative document** • Trainer demonstrates opening the Representative Database and highlighting any of the given views in the navigation panel to be able to click action button for starting a new document • Trainer starts a new representative document and goes through the types of fields and data stored in each • Trainer demonstrates data entry operations	Trainer - Participants (whole group)	45

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer highlights the importance of the fields at the bottom of the document/window showing the name of the user who created the document, the user who last entered data or modified the document and the date/time of each • Trainer demonstrates different methods for saving document, then closes document and shows its addition to views • Trainer repeats steps and creates a new representative document, eliciting data and steps from participants as he/she goes along • Trainer fields questions • Trainer follows the steps in the User's Manual, pages 133-145		
3	Relevant sections of CMA - Data show	**Introduction and demonstration: requirements for saving and closing a representative document** • Trainer quickly demonstrates creating and completing another representative document • Trainer attempts to close document without saving elicits from participants what he/she has done incorrectly • Trainer highlights warning that appears to users in this case • Trainer fields questions • Trainer explains to participants that they will practice creating representative documents after the break	Trainer - Participants (whole group)	20

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OHT 13

THE CMA REPRESENTATIVE DATABASE: KEY FEATURES

- It stores important data about attorneys, such as name, ID, address, telephone and fax numbers, as well as type and number of registration in Lawyers' Syndicate.
- It provides an easy reference tool and contact list.
- It is linked to the Case Database, so that users can transfer data from the Representative Database to case and party documents without entering the same information several times.
- It categorizes attorney information under different views to facilitate access (by name, district, governorate and syndicate registration number).
- It enables users to modify data and save changes.
- It shows names of users who created and last edited documents, with clear dates and times, for ease of tracking.

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DAY 14
SESSION 2: APPLICATION: CREATING REPRESENTATIVE DOCUMENTS
SESSION PLAN

Session Aims	• To encourage in the participants a positive attitude towards maintaining attorney data electronically • To enable the participants to use the steps for creating a representative document • To familiarize the participants with the fields in the representative document • To review with the participants the steps for accessing representative data from within a case document, thus highlighting links between the Representative and Case Databases in the CMA • To make participants aware of the role of the Representative Database in facilitating and expediting data entry into case documents
Behavioral Objective(s) Supported	• 8.12 Utilize the CMA Representative Database, given attorney/ representative data, with a high degree of ease, accuracy and competence
Enabling Objective(s)	• Create representative documents • Save and close representative documents • Use the Representative Database in relationship to party documents for data entry
Content to be Covered	• Steps for creating a representative document • Types of fields in a representative document • Requirements for saving and closing representative documents • Transferring representative data into case documents
Materials	• CMA User's Manual pages 133-145

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of CMA - Data show - Participant PCs	Application: opening the Representative Database and creating representative documents • Participants follow trainer's instructions and steps in User's Manual, pages 133-145, to open the Representative Database and create five representative documents Participants choose to enter actual or simulated data. • Participants practice saving documents using different methods, and saving representative documents • Trainer monitors and provides help as necessary • Trainer fields questions	Trainer - Participants (whole group) Individual work	60
2	Relevant sections of CMA - Data show	Observing links between case and representative documents in the CMA • Participants follow trainer's instructions to open Case Database and open one of the case documents they had created	Trainer - Participants (whole group)	30

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
	- Participant PCs	• Participants review hands-on steps for editing case and party documents by changing the representative data for the parties in the case Participants access new representative information from the additional data now available in the Representative Database • Trainer fields questions and comments	Individual work	
3	User's Manual pages 133-145	**Home assignment** • Trainer asks participants to review pages 133-145 of the User's Manual and note any questions they might like to ask the trainer on the next day	Trainer - Participants (whole group)	N/A

REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide

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DAY 15
SESSION 1: INTRODUCTION AND APPLICATION: VIEWING AND EDITING REPRESENTATIVE DOCUMENTS
SESSION PLAN

Session Aims	• To familiarize the participants with the different views and classifications of documents in the Representative Database • To familiarize the participants with the steps for editing, refreshing, saving and closing representative documents
Behavioral Objective(s) Supported	• 8.12 Utilize the CMA Representative Database, given attorney/ representative data, with a high degree of ease, accuracy and competence • 8.13 Conduct search operations in the various CMA Databases, given a search item or criterion, with a high degree of ease, accuracy and speed • 8.14 Address questions and problems that arise while using the CMA databases, given the CMA User's Manual as a reference tool, with a high degree of confidence and accuracy
Enabling Objective(s)	• View representative documents categorized by name, district/region, governorate or syndicate registration number • Edit existing representative documents • Search for attorney/representative forms documents by name, ID, region/district and syndicate registration number. • Utilize the User's Manual to address questions and problems with attorney/ representative documents
Content to be Covered	• Answer any questions raised on the home assignment of the previous day • Viewing representative documents categorized according to different sorting criteria • Steps for editing refreshing, saving and closing representative documents
Materials	• CMA User's Manual, pages 133-145

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	N/A	Lead in: representative documents • Trainer introduces aims of sessions and elicits from the participants the main features of the CMA Representative Database (review of OHT 13)	Trainer - Participants (whole group)	5
2	Relevant sections of CMA - Data show	Introduction and demonstration: views for representative documents • Trainer demonstrates the different views available in the Representative Database, highlighting each view, information available and classification principles • Trainer elicits from the participants the purpose of the different views • Trainer demonstrates steps for searching for attorney documents under the different views, by name, ID, region/district and syndicate registration number • Trainer fields questions • Trainer follows steps and information in the User's Manual pages 133-145	Trainer - Participants (whole group)	30

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
3	Participant PCs	**Application: viewing representative documents** • Participants work individually to view representative data under different views • Participants practice steps for searching for attorney documents under the different views by name, ID, region/district and syndicate registration number • Trainer monitors and provides help as necessary	Individual work	20
4	Relevant sections of CMA - Data show	**Introduction and demonstration: editing, refreshing, saving and closing representative documents** • Trainer demonstrates steps for performing the above operations (several examples) • Trainer discusses links with case documents • Trainer fields questions	Trainer - Participants (whole group)	20
5	Participant PCs	**Application: editing, refreshing, saving and closing representative documents** • Participants follow trainer's instructions to edit, save and close representative documents • Trainer monitors and provides help as necessary	Individual work	15

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DAY 15
SESSION 2: IMPORTANCE OF THE CMA FOR DATA ENTRY AND CASE ADMINISTRATION
SESSION PLAN

Session Aims	• To review with the participants the key features of the CMA for data entry and case processing/administration
Behavioral Objective(s) Supported	• 8.15 Identify the functions of the CMA for data management and case administration with a high degree of competence and conviction
Enabling Objective(s)	• Identify the roles and responsibilities of CMA users • Briefly describe issues of data access control for different CMA users • Explain the importance of data accuracy and integrity • Demonstrate the value of the CMA fin facilitating and expediting data maintenance, retrieval and management
Content to be Covered	• Review of CMA data processing and case administration features
Materials	• OHT 14 • Worksheet 10 • CMA User's Guide, page 194

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Worksheet 10	Synthesis workshop: CMA features and users • Trainer introduces aims of session in terms of wrapping up by discussing some of the key features of the CMA. • Trainer introduces Worksheet 10 and clarifies task • Trainer divides participants into 4 pairs/small groups, with each pair representing one of the following aspects case documents, party documents, event documents, and representative documents • In their pairs/groups, participants discuss two main points the main features of the CMA in relation to the type of document they represent, and the role of the CMA user in ensuring that the CMA functions properly and provides valid/reliable data • Trainer monitors and provides help/guidance as necessary • Trainer leads feedback session each participant pair/group presents its ideas, while the others make notes to complete Worksheet 10 Trainer guides discussions towards salient points	Group work	60

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
2	OHT 20	**Review: CMA features** • Trainer uses OHT 20 unmasking one point at a time to review with participants the different features of the CMA for data processing and case administration • Trainer discusses key features and elicits participants' opinions, contrasting them with the problems of paper-based case administration from day 1 where applicable • Trainer briefly explains three levels of access in the CMA (see User's Guide, page 170), and highlights to the participants that other users with different levels of access will be able to perform different types of operations, such as deleting data, editing case numbers and data, monitoring technical operations performed by users, and assigning different levels of access to users	Trainer - Participants (whole group)	30
REMINDER Complete relevant sections of the Participant Observation Sheet in the Trainer's Guide Remind participants to complete relevant sections of Worksheet 1				

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OHT 14

DISCUSSING CMA FEATURES

- Facilitating the process of maintaining complete case, party and event data
- Maintaining representative data
- Facilitating the process of entering representative data into case documents
- Selecting events for particular case types
- Scheduling events
- Maintaining complete case records in one location
- Editing case documents and making changes in an organized and neat fashion

- Facilitating the process of notifying colleagues of case developments through electronic mail
- Monitoring case progress
- Preparing statistical data regarding types of cases, progress of case events, and workload of circuits over time
- Preparing printouts of case documents
- Assigning different levels of access so that different users can perform different types of operations

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DAY 16
SESSION 1: TRAINING EVALUATION
SESSION PLAN

Session Aims	• To evaluate the participants' learning from the training • To enable the participants to demonstrate their practical skills as a further evaluation method
Behavioral Objective(s) Supported	• 8.1 to 8.15 (in an evaluative capacity, see Table vii in the introduction to this Trainer's Guide)
Enabling Objective(s)	• Various See behavioral objectives above.
Content to be Covered	• No new content. Evaluation of the overall content of the training
Materials	• CMA Data Entry Training Final Assessment

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	CMA Data Entry Final Assess-ment	CMA Training: Final Assessment • Trainer administers the paper-based CMA Final Assessment • Trainer allows participants 45 minutes to complete assessment. • Trainer monitors	Individual work	45

2	Relevant sections of the CMA - Data show - Participant PCs	Participant demonstrations
		• Trainer asks individual participants to perform given tasks, as follows (1 task per participant)
		  • Create a new case document and complete initial data
		  • Create a plaintiff document
		  • Create a defendant document
		  • Create a party document of type "other"
		  • Compute party names into case document, confirm case and create one event document of type "hearing"
		  • Print final case form, create an event document of type "document" and attach another document to it
		  • Create an event document of type "fees" and notify other participants of it, then print a case label
		  • Edit a party document: change party name and attorney data by creating a new attorney in the Representative Database, and reflect changes in the main case document
		  • Create a new mail message and send it to the trainer's e-mail address, cc to one of the participants and bcc it to another, then forward this mail to a third participant
			Individual work	40 (then 50 after the break)

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Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
		• Trainer allows each participant 10 minutes to complete assigned task • Trainer administers 4 participant demonstrations before the break • Trainer gives break • Trainer administers remaining 4-5 participant demonstrations after the break • If trainer detects a reluctance on the participants' part to work on demonstrations using the data show, then trainer allows participants to use their own PCs as an alternative • Trainer observes demonstrations carefully and assesses participants' performance		

Distribution of Points for the CMA Data Entry Training Program: Final Assessment

Part A 10 points (1 per item)
Part B 4 points (1 per item)
Part C 6 points (1 per item)
Part D 5 points (1 per positive point listed)
Total 25 points

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CMA DATA ENTRY TRAINING
FINAL ASSESSMENT

Participant Name: ______________________________

Date: ______________________________

A. Define the following technical terms and give one example from the CMA for each item.

TERM	DEFINITION	EXAMPLE
1. Bookmark		
2. Rich text field		
3 Hotspot		
4. Menu		
5 Computed field		
6 Dialogue list		
7 Date field		
8 Choice button		
9 Embedded view		
10 Status bar		

B. What happens in the CMA in the following cases:

11 You try to confirm a case without entering party documents

12 You try to close a document without having saved it.

13. You enter text in a number field

14 You confirm an event without entering the date of completing that event.

C. Describe one CMA operation for doing the following

15. Converting a document to editable mode

16 Showing a case document from within a party document

17. Creating an event from within a case document

18 Printing the final form of a case

19 Converting a case from print form to full, editable form

20 Creating a new representative document from within a party document

D. List five points that you consider to be the main advantages of the CMA.

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DAY 16
SESSION 2: TRAINING EVALUATION
SESSION PLAN

Session Aims	• To enable the participants to demonstrate their practical skills as a further evaluation method • To evaluate the participants' satisfaction with the training
Behavioral Objective(s) Supported	• 8.1 to 8.15 (in an evaluative capacity, see Table vii in the introduction to this Trainer's Guide)
Enabling Objective(s)	• Various. See behavioral objectives above.
Content to be Covered	• No new content Evaluation of the overall content of the training
Materials	• DT2 Training Program Exit Evaluation Form

Activity/ Task #	Material-Training Aid	Activity/Task Description and Procedure	Main Interaction Pattern(s)	Estimated Timing in Minutes
1	Relevant sections of the CMA - Data show - Participant PCs	**Participant demonstrations** • Trainer resumes participant demonstrations (see session plan 16-1 for details of tasks to be completed by the participants and time allowed per task • If trainer detects a reluctance on the participants' part to work on demonstrations using the data show, then trainer allows participants to use their own PCs as an alternative • Trainer observes demonstrations carefully and assesses participants' performance	Individual work	50 (+10 for transitions between demos)
2	DT2 Training Program Exit Evaluation Form	**Assessment of participants' satisfaction and self-assessment of learning** • Trainer administers the DT2 Training Program Exit Evaluation Form and gets participants to complete the form individually • Trainer allows participants 30 minutes to complete the form • Trainer ends the training by thanking participants for their hard work and sending them a "thank you" e-mail that they can access and read	Individual work	30

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ARABIC VERSION OF THE OVERHEAD TRANSPARENCIES

شفافة رقم ١٤

مناقشة سمات تطبيق إدارة الدعوى

- تسهيل عملية الاحتفاظ ببيانات كاملة عن الدعوى وخصومها وإجراءاتها.
- الاحتفاظ ببيانات المحامين
- تسهيل عملية إدخال بيانات المحامين في نماذج الدعاوى والخصوم.
- اختيار الإجراءات الخاصة بنوع دعوى معين
- جدولة الإجراءات
- الاحتفاظ بسجلات دعاوى كاملة في موقع واحد
- تحرير نماذج الدعوى والتغيير فيها بشكل منظم ومنمق.
- تسهيل عملية إخطار المستخدمين بتطور سير الدعوى عن طريق البريد الإلكتروني.

شفافة رقم ١٣

قاعدة بيانات المحامين:

السمات الرئيسية

- تقوم بتخزين بيانات هامة عن المحامين، مثل الاسم ورقم تحقيق الشخصية والعنوان ورقم التليفون والفاكس، بالإضافة إلى رقم ونوع القيد بنقابة المحامين.
- تمثل مرجعاً سهلاً ووسيلة اتصال.
- متصلة بقاعدة بيانات الدعاوى، حيث يمكن للمستخدمين نقل البيانات من قاعدة بيانات المحامين إلى نماذج الدعاوى والخصوم، دون الحاجة إلى إعادة إدخال نفس البيانات مرات عدة.
- تصنف بيانات المحامين تحت عروض مختلفة لتسهيل الوصول إليها (عن طريق الاسم، أو المركز، أو المحافظة، أو رقم القيد بنقابة المحامين).
- تتيح للمستخدمين تعديل البيانات وحفظ التغييرات.
- يظهر بأسفل نماذج المحامين أسم المستخدم الذي انشأ النموذج و المستخدم الذي قام بآخر تعديل و تاريخ و ساعة القيام بهذه العمليات لسهولة المتابعة.

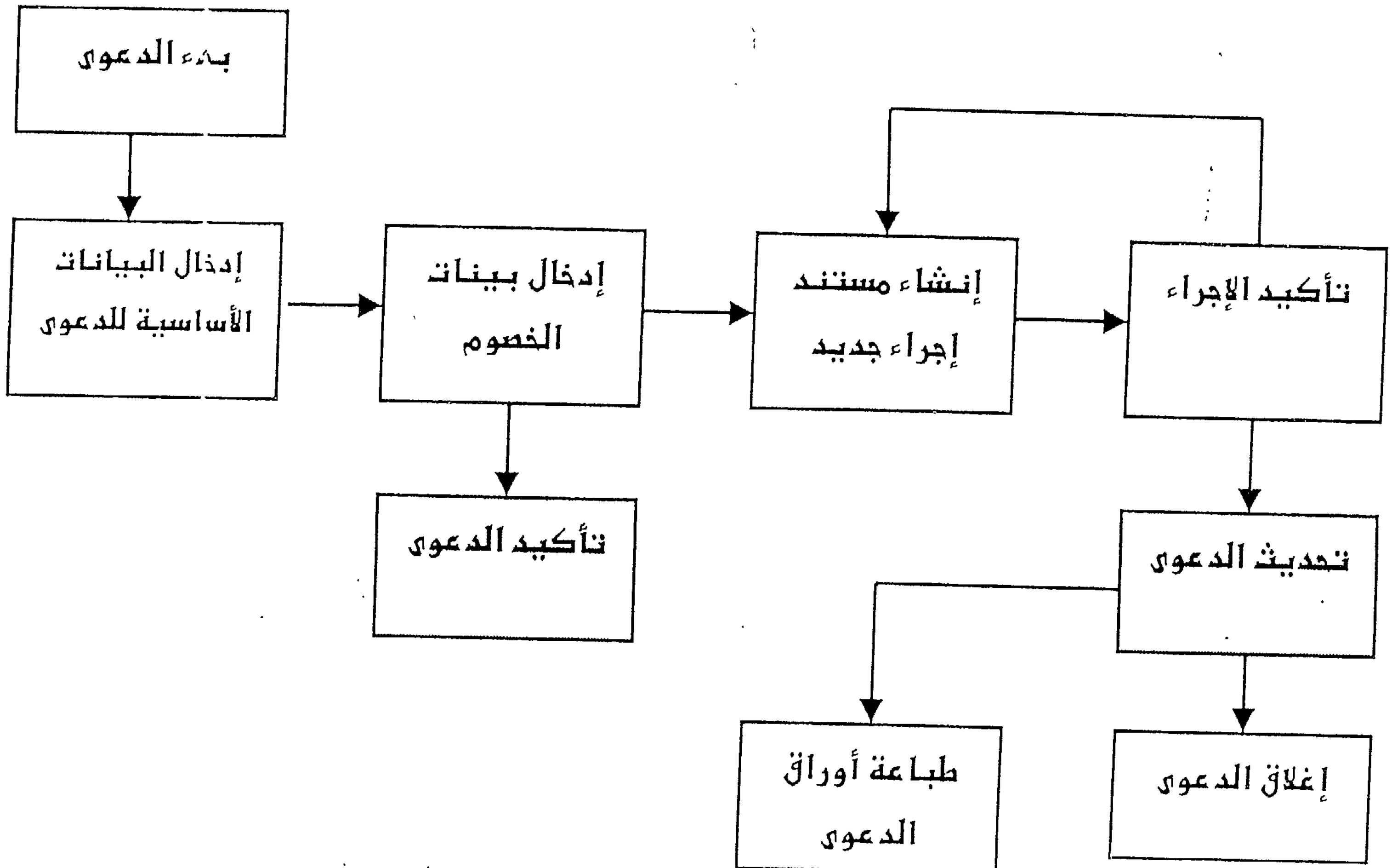
شفافة رقم ١٢

كيف يتعامل تطبيق إدارة الدعوى مع إجراءات الدعوى؟

- يتيح للمستخدمين إنشاء نماذج إجراءات للدعوى وإدخال بيانات الإجراءات وتحريرها.
- يوفر للمستخدمين قائمة بالإجراءات المتوقعة حسب نوع الدعوى، مرتبة بشكل منطقي ووفق تسلسل زمني.
- يقترح على المستخدمين الإجراء التالي وفقاً لنوع الدعوى، ويتيح لهم اختيار إجراء مختلف.
- يصنف كل إجراءات الدعوى إلى إجراءات تمت بالفعل وإجراءات متداولة، مما يسهل عملية متابعة سير الدعوى.
- يصنف الإجراءات التامة والإجراءات المتداولة تصنيفاً فرعياً في العروض المختلفة.
- توفر عروض الإجراءات ببيانات إحصائية لمتابعة تنفيذ الخطوات ومدة تداولها.
- يمكن للمستخدمين إخطار بعضهم البعض بإجراءات الدعوى باستخدام البريد الإلكتروني.

شفافة رقم 11

تدفق البيانات والمستندات في قاعدة بيانات برنامج تطبيق إدارة الدعاوى



شفافة رقم ١٠

السمات والوظائف الرئيسية لتطبيق إدارة الدعوى

- يمثل حلاً لمتابعة سير الدعاوى وإدارتها من خلال تكنولوجيا عالية المستوى.
- يتيح للمستخدمين تخزين واسترجاع البيانات والنماذج الخاصة بالدعاوى.
- يدمج كل البيانات والنماذج الخاصة بدعوى واحدة في سجل دعوى واحد.
- يتيح للمستخدمين متابعة سير الدعوى عن طريق مراقبة الإجراءات التي تمت والإجراءات المتداولة، ومراقبة التغييرات في الدعوى.
- يقوم باستخلاص البيانات الإحصائية للدعاوى ويوفر نظم متابعة تحت العروض المختلفة لقواعد البيانات.
- يتيح للمستخدمين طباعة نماذج الدعاوى عن طريق تجهيز وتنسيق نسخة الطباعة من قاعدة بيانات الدعاوى.

شفافة رقم ٩

خصائص أخرى لنماذج اللوتس نوتس وتطبيق إدارة الدعوى

زر الإجراء	يظهر أعلى النمازج أو العرض. ويمكن للمستخدمين النقر عليه للقيام بعمليات معينة مثل إنشاء أو تأكيد نموذج معين.
نقطة فعالة	تظهر داخل النموذج. ويمكن للمستخدمين النقر عليها للقيام بعمليات مثل الانتقال إلى نموذج آخر.
المقطع	هو قسم داخل المستند، يمكن للمستخدمين بالنقر على السهم الصغير إظهاره والحصول على بيانات أو تفاصيل إضافية.
عرض مضمن أو مدمج	هو عرض داخل المستند، يتيح للمستخدمين استعراض وفتح وتحرير نماذج أخرى.

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شفافة رقم ٨

فئات الحقول

تنقسم الحقول في نماذج اللوتس نوتس وتطبيق إدارة الدعوى إلى فئتين:

حقول قابلة للتحرير	يدخل فيها المستخدمون البيانات بأنفسهم.
حقول محسوبة	لا يمكن للمستخدمين إدخال البيانات فيها؛ حيث يقوم تطبيق إدارة الدعوى بإجراء عملية حسابية معينة لتزويد تلك الحقول بالبيانات.

شفافة رقم ٧

حقول اللوتس

حقل نص	يمكن للمستخدمين إدخال نصوص أو أرقام، ولكن لا يمكنهم تنسيق الخط والحجم.
حقل نص منسق	يمكن للمستخدمين إدخال نصوص، وتنسيق الخط والحجم، وإرفاق مستندات أخرى.
حقل رقم	يمكن للمستخدمين إدخال أرقام فحسب.
حقل تاريخ	يمكن للمستخدمين إدخال تاريخ أو الاختيار من قائمة أو نتيجة.
مربع اختيار	يمكن للمستخدمين إدخال علامة X لاختيار مربع واحد أو أكثر.
زر اختيار	ينقر المستخدمون لاختيار عنصر واحد فقط
قائمة حوار	ينقر المستخدمون على السهم للحصول على قائمة اختيارات ، ثم الاختيار منها.

شفافة رقم ٦

مكونات قواعد بيانات اللوتس

قاعدة البيانات	هي مساحة لتخزين البيانات، طبقا لموضوع أو طبيعة هذه البيانات.
المستند	هو وحدة تخزين البيانات الرئيسية داخل قاعدة البيانات.
النموذج	يتم إدخال البيانات داخل المستندات في صورة نماذج.
الحقل	توجد مجموعة من الحقول داخل كل نموذج يتم استكمالها بالبيانات.
العرض	هو وسيلة لاستعراض المستندات والبيانات داخل قاعدة البيانات.

شفافة رقم ٥

ما هو اللوتس نوتس؟

هو برنامج يتيح لمستخدميه ما يلي:

- تخزين البيانات واسترجاعها من قواعد بيانات اللوتس؛
- إجراء العمليات الإحصائية على البيانات؛
- إرسال واستقبال البريد الإلكتروني؛
- مشاركة المعلومات والملفات مع الآخرين؛
- متابعة تقدم سير العمل؛
- حفظ (أرشفة) البيانات؛ و
- رفع مستوى العمل الجماعي.

شفافة رقم ٤

ما هو تطبيق إدارة الدعوى؟

- هو تطبيق قواعد بيانات يعمل على اللوتس نوتس.
- هو تطبيق معرب للمحاكم المصرية خاصة.
- يتكون من ثلاث قواعد بيانات رئيسية.

– قاعدة بيانات الدعاوى (لتخزين واسترجاع كل البيانات الخاصة بالدعوى)

– قاعدة بيانات المحامين (لتخزين واسترجاع بيانات المحامين).

– قاعدة بيانات الإشراف على التطبيق أو log (للإشراف والدعم الفني).

- سوف يستخدم أمناء السر التطبيق في إدخال بيانات الدعاوى وإجراءاتها وبيانات الخصوم والمحامين، بالإضافة إلى الحصول على معلومات لأغراض إدارة الدعاوى.

شفافة رقم ٣

النتائج المتوقعة

- رفع مستوى الوصول لبيانات دقيقة يعول عليها لكل الدعاوى؛ و

- زيادة سرعة الوصول لبيانات الدعوى.

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شفافة رقم ٢

أهداف التدريب

- استخدام اللوتس نوتس لتشغيل تطبيق إدارة الدعوى.
- استخدام بريد لوتس نوتس الإلكتروني لتبادل إجراءات الدعاوى بين المستخدمين.
- إنشاء واستعراض وتحرير وطباعة نماذج الدعاوى في قاعدة بيانات الدعاوى
- إنشاء وتحرير وتأكيد واستعراض إجراءات الدعاوى.
- إنشاء وتحرير واستعراض عروض نماذج الخصوم.
- الاستفادة من قاعدة بيانات المحامين لتخزين واسترجاع بيانات المحاميين.
- البحث عن نماذج/ بيانات الدعاوى و الوصول إليها بسهولة في قواعد بيانات تطبيق إدارة الدعوى.
- الاستفادة من دليل المستخدم الخاص بتطبيق إدارة الدعوى للتغلب على مشكلات تشغيل التطبيق.
- تعريف وظائف تطبيق إدارة الدعوى الخاصة بإدخال بيانات الدعاوى و إدارتها.

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شفافة رقم ١

تطبيق إدارة الدعوى:

التدريب على إدخال البيانات

الهدف الرئيسي:

- رفع مستوى إدخال بيانات الدعاوى والحفاظ عليها/تحديثها، وسرعة الوصول إلى البيانات الدقيقة بسرعة.
- وسوف يؤدي ذلك بدوره إلى تطوير إدارة الدعاوى بالمحكمة.