LASPNET IIMS

USER MANUAL

CASES, REPORTS AND CLIENTS

Help with IIMS 12.2

For help with a specific administrator page, within the IIMS administrator interface you can click on the help toolbar icon for further information about the page.

Help Screen Version Notice

These Help Screens are for the current version of the IIMS! which is version **12.2**

Getting started

If you have only recently starting working with the IIMS you will probably have experienced the pain of learning a new system. New terminology, new ways of doing things, perhaps even the web itself may be new to you. Then let this guide relieve some of that pain.

Quick Tips

You can use the following keyboard shortcuts in some of the operations on the IIMS

- **New:** Ctrl + N
- **Delete:** Shift + Delete
- **Select all items:** Ctrl + A
- **Save:** Ctrl + S
- **Save and Close:** Shift + Alt + S
- **Save and New:** Shift + Alt + N
- **Cancel/Close:** Esc

Cases Manager

Overview

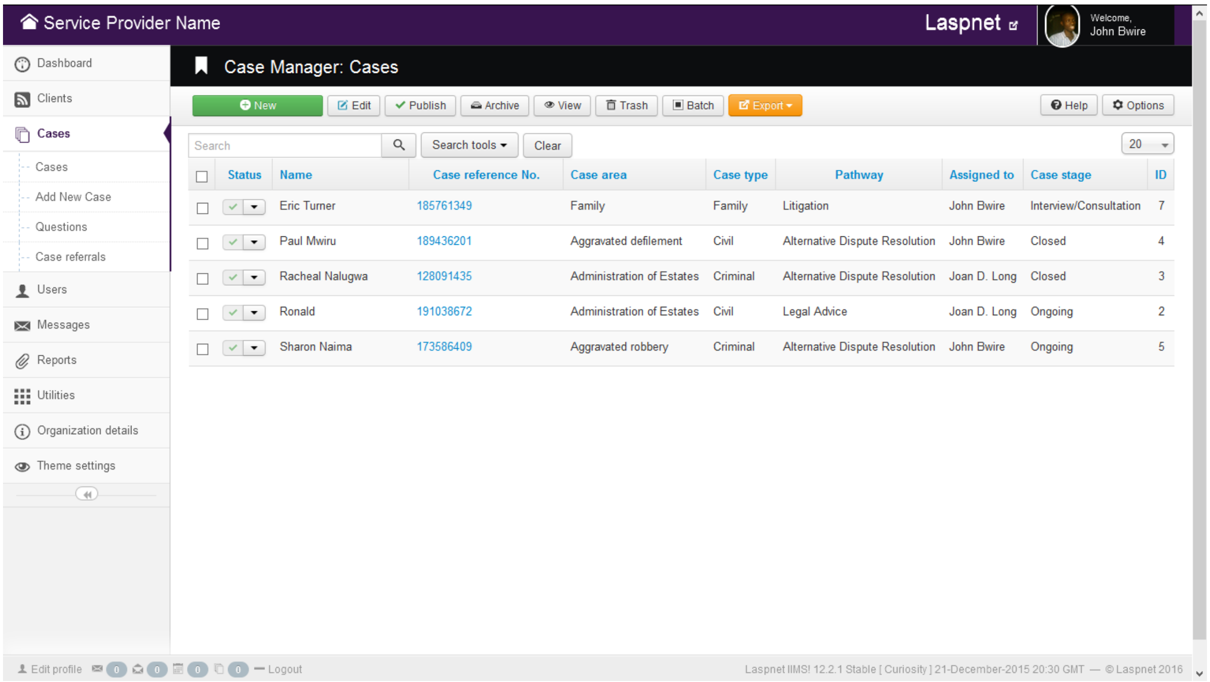
This screen is for cases used to edit/add cases.

How to Access

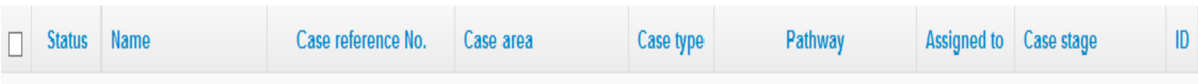
- Select **Cases → Cases** from the drop-down menu of the ***Administrator Panel***

Description

The Cases Manager is where you can edit existing Cases or create new ones and view cases.



Column Headers



Click on the column heading to sort the list by that column's value.

- **Checkbox**. Check this box to select one or more items. To select all items, check the box in the column heading. After one or more boxes are checked, click a toolbar button to take an action on the selected item or items. Only publish,archive,batch and trash toolbars can work with multiple items. Others, such as Edit and view, only work on one item at a time. If multiple items are checked and you press Edit or view, the first item will be opened for editing or viewing.
- **Status.** (Published/Unpublished/Trashed/Archived) The published status of the case.

- **Name.** The name of the client the case is attached to.
- **Case Reference number** A unique number assigned to each case for easy tracking and identification.
- **Case Area.** This is the nature of the crime.
- **Pathway.** Pathway of the case .
- **Assigned to.** The person in this case the lawyer handling the case. Note: This column is only visible to "Super Administrators"
- **Case stage.** The stage the case has reached.

  - **ID**. This is a unique identification number for this item assigned automatically by the system!. It is used to identify the item internally, and you cannot change this number. When creating a new item, this field displays 0 until you save the new entry, at which point a new ID is assigned to it

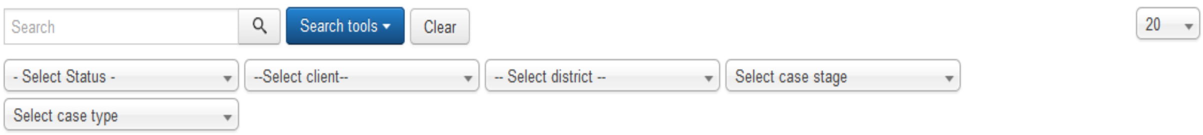
List Filters

Filter by Partial Title

You can filter the list of items by typing part of the client's name.

Click X to clear the Filter field and restore the list to its unfiltered state

Filter by selected State

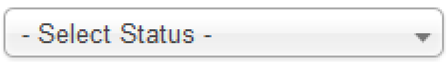


In the upper right area, above the column headings, there is one drop-down box as shown below:

Only items matching the selected state will display in the list.

Filter by Published State, Client, Category, and Language

Filter by Published Status. Lets you show only items with the selected published status.

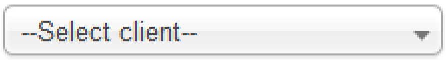


  - ***- Select Status -:*** Shows items that are Trashed or Archived.
  - ***Archived:*** Shows only cases that are Archived.
  - ***Trashed:*** Shows only cases that are Trashed. *Important Note:* **To permanently delete items:**
    1. Change the status of the items to Trashed.

2. Change the Status filter to Trashed. At this point the trashed items will show and an icon called "Empty trash" will show in the toolbar.
3. Select the desired trashed items and click on "Empty Trash" in the toolbar. The items will be permanently deleted.

- ***All:*** Shows all items regardless of published status.

Filter by Client. Lets you show only cases that have a specific client assigned. The list box will show the clients attached to a particular case



- ***- Select Client -*** or ***All:*** Show cases for any client.
- ***<client name>:*** Show cases only for this client. Note: Cases are grouped for a single client hence only the latest case of the client appears. However after filter, all cases attached to the client are shown

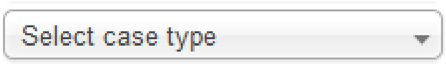
Filter by District. Lets you show only cases attached to clients from a particular district

- ***- Select District -*** or ***All:*** Show cases for clients from any district.
- ***<District>:*** Show cases attached to clients from a particular district

Filter by Case stage. Lets you show only cases in a particular stage

- ***- Select Case Stage -*** or ***All:*** Show cases for all stages.
- ***<CaseStage>:*** Show cases that are in a particular stage

Filter by Case type. Lets you show only cases of a particular type



- ***- Select Case Type -*** or ***All:*** Show cases of all types.
- ***<CaseType>:*** Show cases that belong to a particular type

Toolbar

At the top left you will see the toolbar:

The functions are:

- **New**. Opens the editing screen to create a new case
- **Edit**. Opens the editing screen for the selected case. If more than one case is selected (where applicable), only the first case will be opened. The editing screen can also be opened by clicking on the case reference number
- **Publish:** Makes the selected case available in the cases table
- **Archive:** Changes the status of the selected cases to indicate that they are archived. Archived cases can be moved back to the published or unpublished state by selecting "Archived" in the Select Status filter and changing the status of the cases to Published or Unpublished as preferred

  View: View the selected case in details. Remember only the first item selected is considered

- **Trash**. Changes the status of the selected cases to indicate that they are trashed. Trashed cases can still be recovered by selecting "Trashed" in the Select Status filter and changing the status of the cases to Published or Unpublished as preferred. To permanently delete trashed cases, select "Trashed" in the Select Status filter, select the cases to be permanently deleted, then click the Empty Trash toolbar icon

- **Batch**. Batch processes the selected cases. Works with one or multiple cases selected.

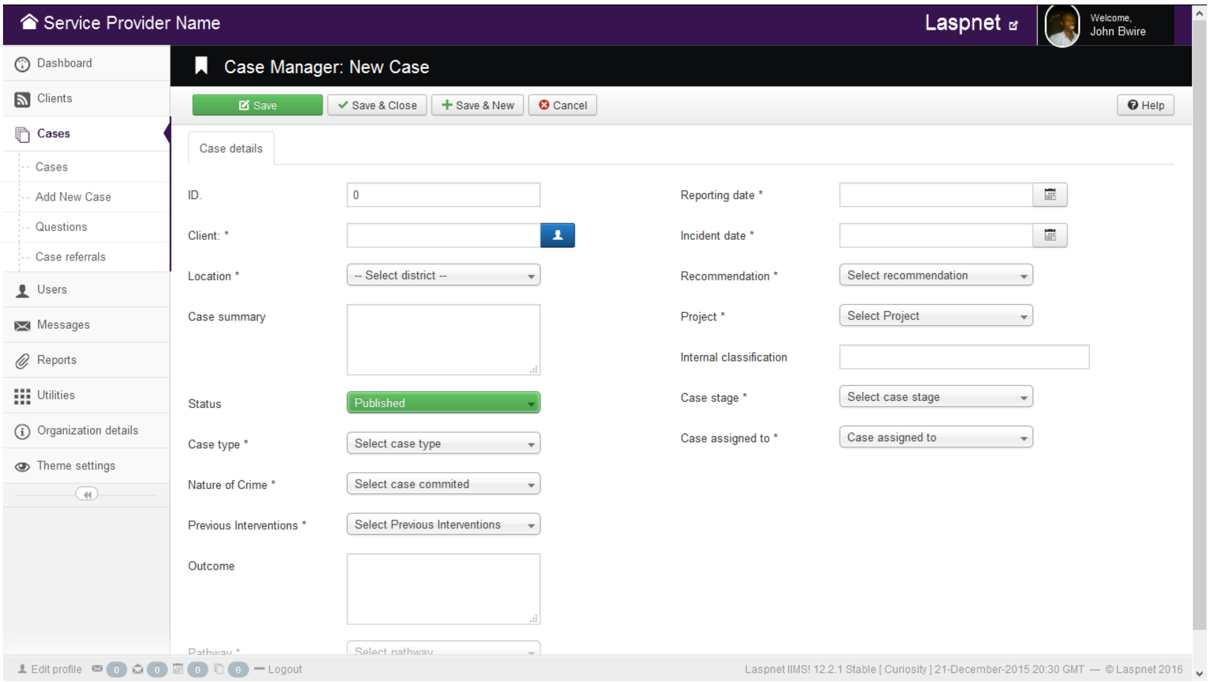
- **Export:** Includes exporting options. Ounce clicked the following options appear;
  - **To CSV** CSV simply is Comma Separated Values. It is a simple excel storage format. Ounce clicked will open a dialogue box from which you can download the excel csv format document with the cases details
  - **To PDF** This will simply export the cases data to a pdf document available for download

- **Options:** Opens the Options window where permissions can be set
- **Help**. Opens this help screen

Cases Manager – Edit/Add

Overview

This screen is used to add or edit cases.



How to Access

Navigate to the the Cases Manager. To add a new Case, click on the *New* icon in the toolbar. To edit an existing Case, click on the Case reference number or check the Cases's checkbox and press the *Edit* icon in the toolbar.

Description

This is where you add a new Case or edit an existing one.

Details

Case Details

- **Client.** The client associated with the case.
- **Location.** District where case was committed.
- **Case summary** Information about the case
- **Status.** Whether the case is achived, published or trashed.
- **Case type.** The type of case being reported.
- **Nature of crime.** The nature of crime committed.
- **Previous Interventions.** Other legal interventions the client may have sought.
- **Reporting date.** The date the case is reported at the office.

- **Recommendation.**Any recommendations for the client.
- **Case stage.** The stage the case has reached. Note: if the stage is closed then options for closed by and reason for closure show and are required
- **Case assigned.** The lawyer handling the case. Only available to "Super Administrator"

Toolbar

At the top left you will see the toolbar for a **Edit Case** or **New Case**

Manager: Edit Case:

- **Save:** Saves the case and stays in the current screen

- **Save & Close**. Saves the case and closes the current screen

- **Save & New**. Saves the case and keeps the editing screen open and ready to create another case

- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made

- **Help**. Opens this help screen

Manager: New Case:

- **Save:** Saves the case and stays in the current screen

- **Save & Close**. Saves the case and closes the current screen

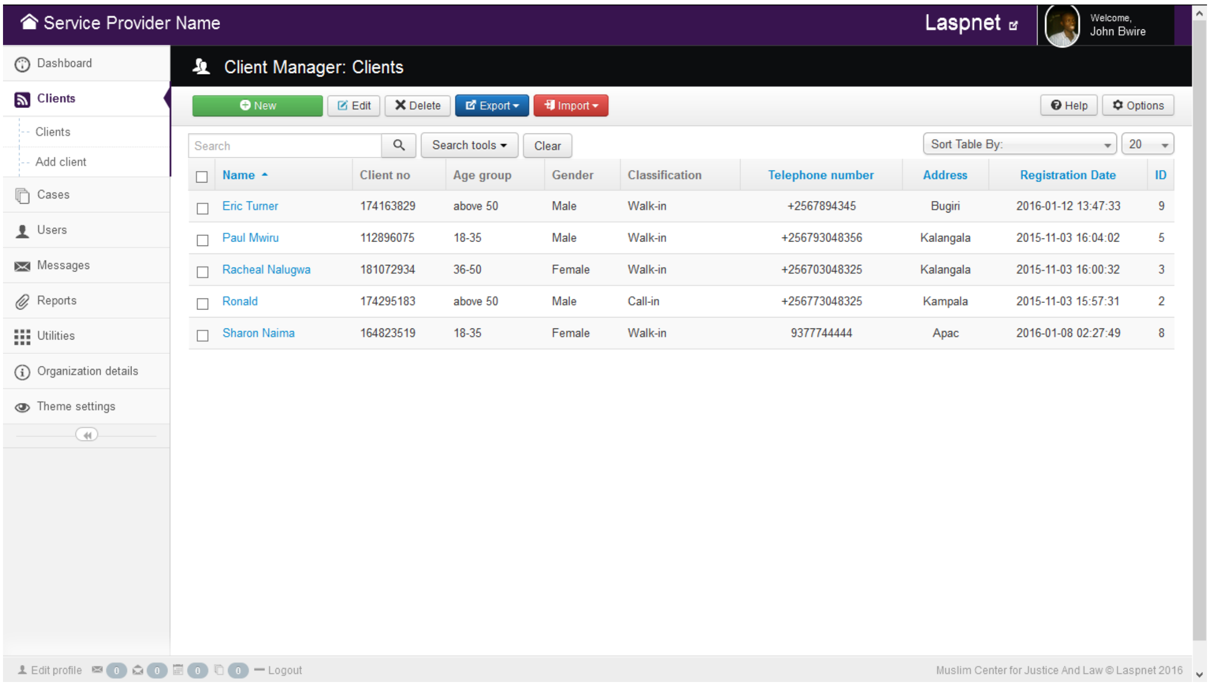
- **Save & New**. Saves the case and keeps the editing screen open and ready to create another case

- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made

- **Help**. Opens this help screen

CLIENTS ADD/EDIT

This screen is for clients used to edit/add clients.



How to Access

- Select **Clients** → **Clients** from the drop-down menu of the ***Administrator Panel***

Description

The Clients Manager is where you can edit existing Clients or create new ones. Note that the client is entered once and in the event they comeback the system already has them so no need to re-enter them.

Column Headers

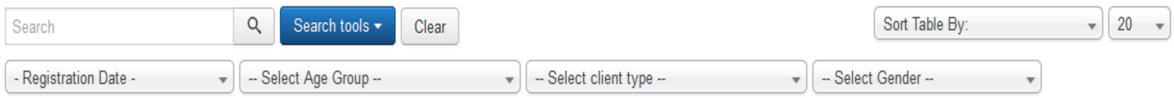
Click on the column heading to sort the list by that column's value.

- **Checkbox**. Check this box to select one or more items. To select all items, check the box in the column heading. After one or more boxes are checked, click a toolbar button to take an action on the selected item or items. Only delete toolbar can work with multiple items. Others, such as Edit and export single client, only work on one item at a time. If multiple items are checked and you press Edit, the first item will be opened for editing. Also if you click on export single client menu, only one client is exported
- **Name.** The name of the Client. You may click on the name to open the Client for editing.
- **Client no.** A unique number assigned to a client during entry.

- **Age group** The agegroup the client falls into.
- **Gender.** Whether Male or Female.
- **Classification.** This simply indicates whether the client came directly to the office(walk-in) or made a call (Call-in) .
- **Telephone number.** The telephone number of the client.
- **Address.** The address of the client.
- **Registration date.** The date the client was registered.

  - **ID**. This is a unique identification number for this item assigned automatically by the system!. It is used to identify the item internally, and you cannot change this number. When creating a new item, this field displays 0 until you save the new entry, at which point a new ID is assigned to it

List Filters



Filter by Partial Title

You can filter the list of items by typing part of the client's name.

Filter by selected State

Only items matching the selected state will display in the list. Chunk30:Listfiltering

Toolbar

The functions are:

  - **New**. Opens the editing screen to create a new client

  - **Edit**. Opens the editing screen for the selected client. If more than one client is selected (where applicable), only the first client will be opened. The editing screen can also be opened by clicking on the Name of the client

  - **Delete**. Deletes one or more clients. Be carefull with this option as data deleted cannot be retrieved

- **Export:** Includes exporting options. Ounce clicked the following options appear;
  - **To CSV** CSV simply is Comma Separated Values. It is a simple excel storage format. Ounce clicked will open a dialogue box from which you can download the excel csv format document with the clients details
  - **To PDF** This will simply export the client data to a pdf document available for download
  - **Single Client** This basically means you export data for a single client hence requires checking against the client of choice. The data will also include the case history of the client

- **Import:** Includes importing options. Ounce clicked, the following appears
  - **Excel** Allows you to import client data into the system in form of a Microsoft Excel worksheet. This simply means you can enter data about a client offline and enter into the system at a later stage. Ounce clicked, a new page will be opened for you to import this particular chosen format, any other shall be rejected by the system. If you get something like " An error occured during the import process", the format could be the cause. Here is a sample of the excel sheet that you MUST use to enter the data Download
  - **CSV** Allows you to import client data into the system in form of a Microsoft Excel Comma Separated Values. Remember in this case also, any other other format will be rejected. If you get something like " An error occured during the import process", the format could be the cause. Here is a sample of the excel sheet that you MUST use to enter the data Download
- **Options:** Opens the Options window where permissions can be set

- **Help**. Opens this help screen

Clients Manager: Edit/Add

Overview

This screen is used to add or edit clients.

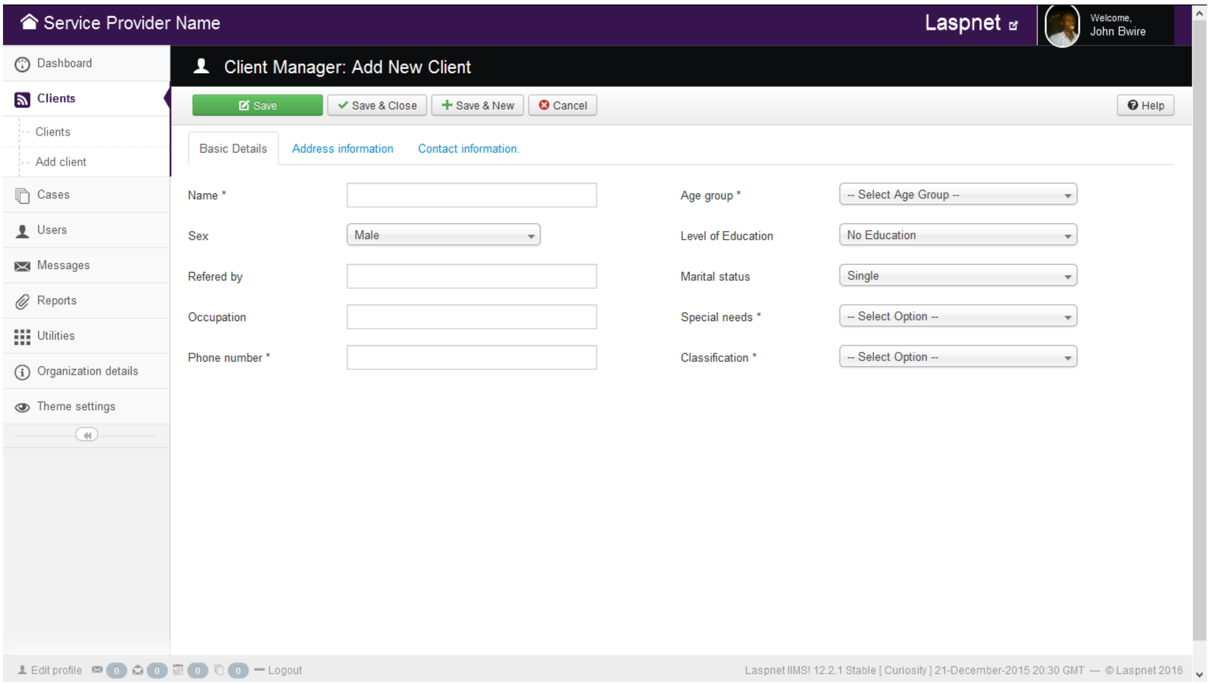
How to Access

Navigate to the the Client Manager. To add a new Client, click on the *New* icon in the toolbar. To edit an existing Client, click on the Client's Name or check the Client's checkbox and press the *Edit* icon in the toolbar.

Description

This is where you add a new Client or edit an existing one.

Screenshot



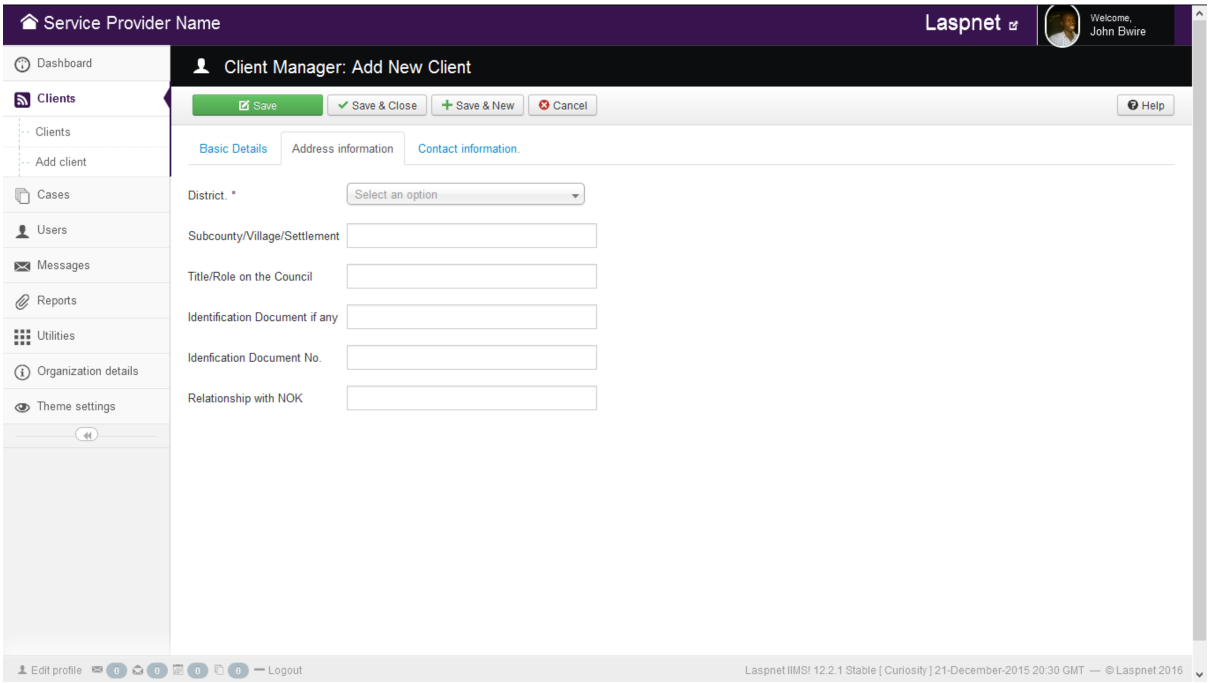
Details and Options

Details

- **Name.** The Fullname of the client.
- **Sex.** Gender of the client.
- **Refered by** The person who refered the client to the service provider office
- **Occupation.** The type of work the client does.
- **Phone number.** Phone number of the client.

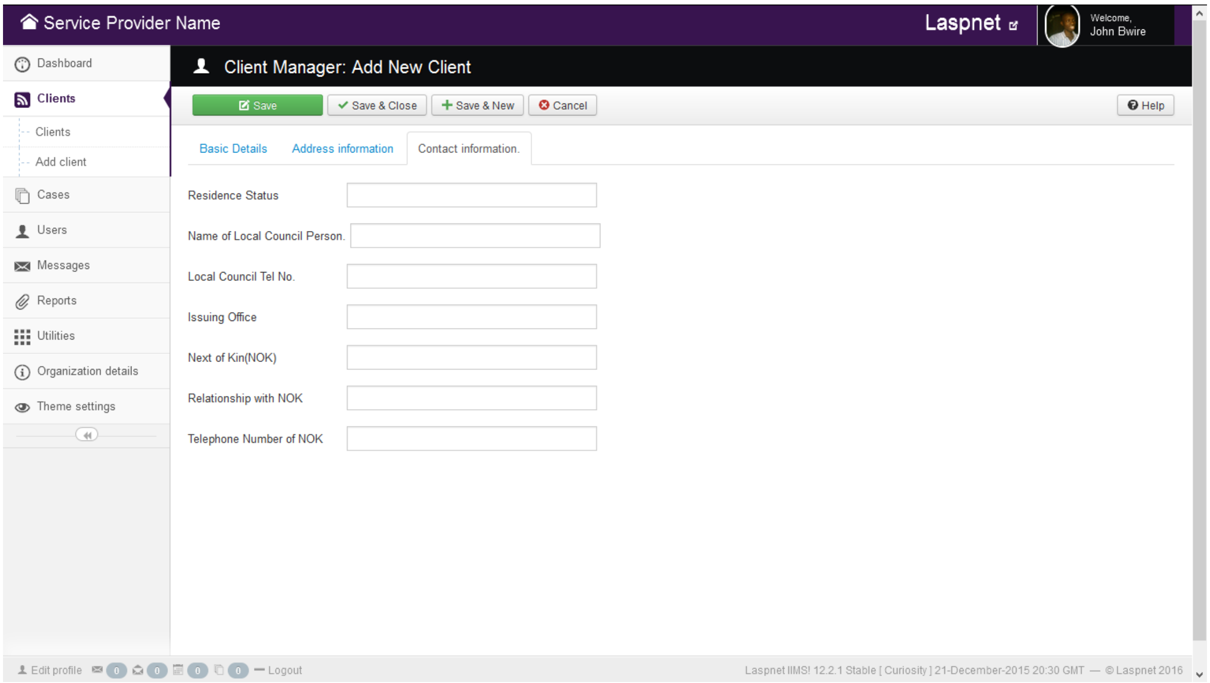
- **Agegroup.** Which age group the client falls in.
- **Level of education.** Education level the client reached in.
- **Marital status.** Marriage status of the client.
- **Agegroup.** Which age group the client falls in.
- **Special needs.** Indicate whether the client has any disability.
- **Classification.** State whether the client simply made a call (Call-in) or came directly to the office (Walk-in).

Address Information



- **District.** The district where the client resides from.
- **Subcounty/Village/Settlement.** Subcounty of the client.
- **Title/Role on the Council** Title/Role on the Council of the client
- **Identification Document if any.** Any document like Identity card the client may possess.
- **Idenfication Document No.** ID Number on the identification document.

Contact Information



- **Residence Status.** Residence Status of the client.
- **Name of Local Council Person.** Name of the local council chairman of the client.
- **Local Council Tel No** The telephone number of the local council chairman of the client
- **Next of Kin(NOK).** Any next of kin of the client.
- **Relationship with NOK.** Relationship with the next of kin.
- **Telephone Number of NOK.** Telephone number of the next of kin.

Toolbar

At the top left you will see the toolbar for a **Edit Client** or **New Client**

Manager: Edit Client:

- **Save:** Saves the client and stays in the current screen

- **Save & Close**. Saves the client and closes the current screen

- **Save & New**. Saves the client and keeps the editing screen open and ready to create another client

- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made

- **Help**. Opens this help screen

Manager: New Client:

- **Save:** Saves the client and stays in the current screen

- **Save & Close**. Saves the client and closes the current screen

- **Save & New**. Saves the client and keeps the editing screen open and ready to create another client

- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made

- **Help**. Opens this help screen

REPORTS MANAGER

Overview

This screen is for reports used to create/edit reports. It basically helps you generate reports using the available criteria, allowing you to choose the fields that you want to display

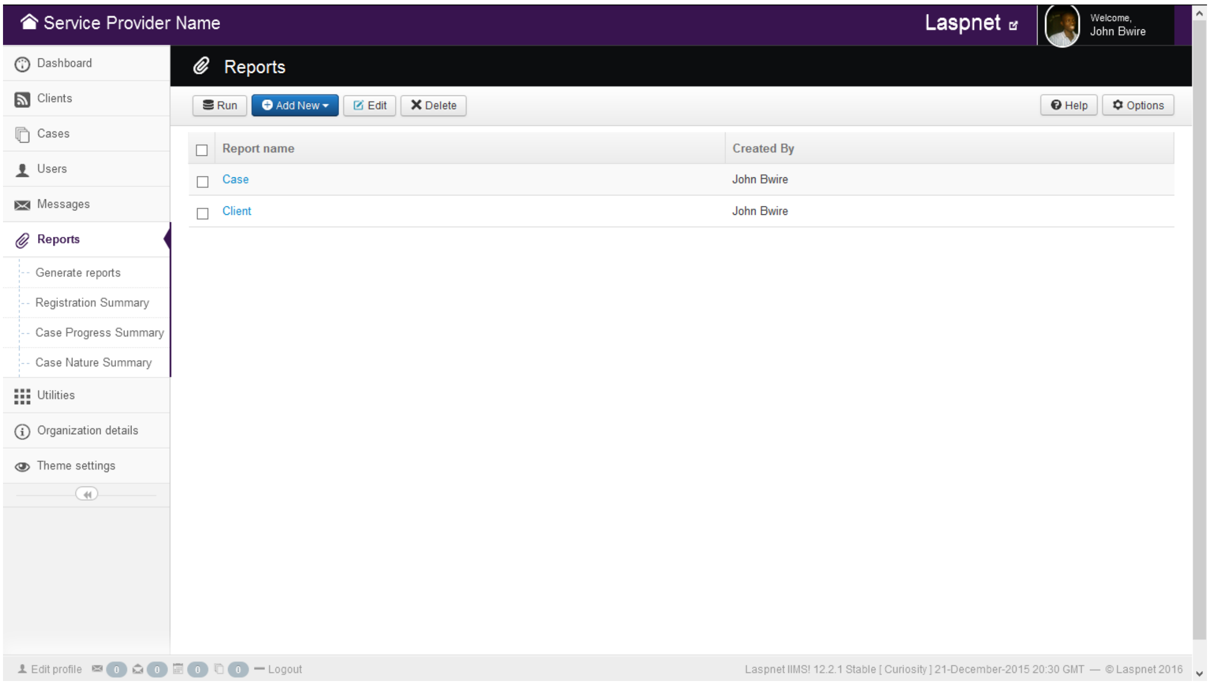
How to Access

- Select **Reports** → **Generate Reports** from the drop-down menu of the ***Administrator Panel***

Description

The reports manager facilitates various and adhoc queries to quickly look up information, from which can be analysed and decisions made according to the analysis realised

Screenshot



Column Headers

Click on the column heading to sort the list by that column's value.

- **Checkbox**. Check this box to select one or more items. To select all items, check the box in the column heading. After one or more boxes are checked, click a toolbar button to take an action on the selected item or items. Only delete toolbar can work with multiple items. Others, such as Edit and Run, only work on one item at a time. If multiple items are checked and you press Edit, the first item will be opened for editing. (Same applies for run). Note: For you to run a report, you must have created it.

- **Name.** The name of the report.
- **Created By** The person who created the report.

Toolbar

At the top left you will see the toolbar:

The functions are:

- **Run**. Opens the created report using the supplied criteria and display fields.

- **Add New**. Ounce clicked a dropdown appears.
    - **Client report** This allows you to create a report using the client details in the system
    - **Case report** This allows you to create a report using the case details in the system

- **Edit**. Opens the editing screen for the selected report. If more than one item is selected (where applicable), only the first item will be opened. The editing screen can also be opened by clicking on the Name of the report.

- **Delete**. Deletes one or more reports. Be carefull with this option as data deleted cannot be retrieved

- **Options:** Opens the Options window where permissions can be set.

- **Help**. Opens this help screen.

REPORTS: CREATE/EDIT

Overview

This screen is used to create or edit reports.

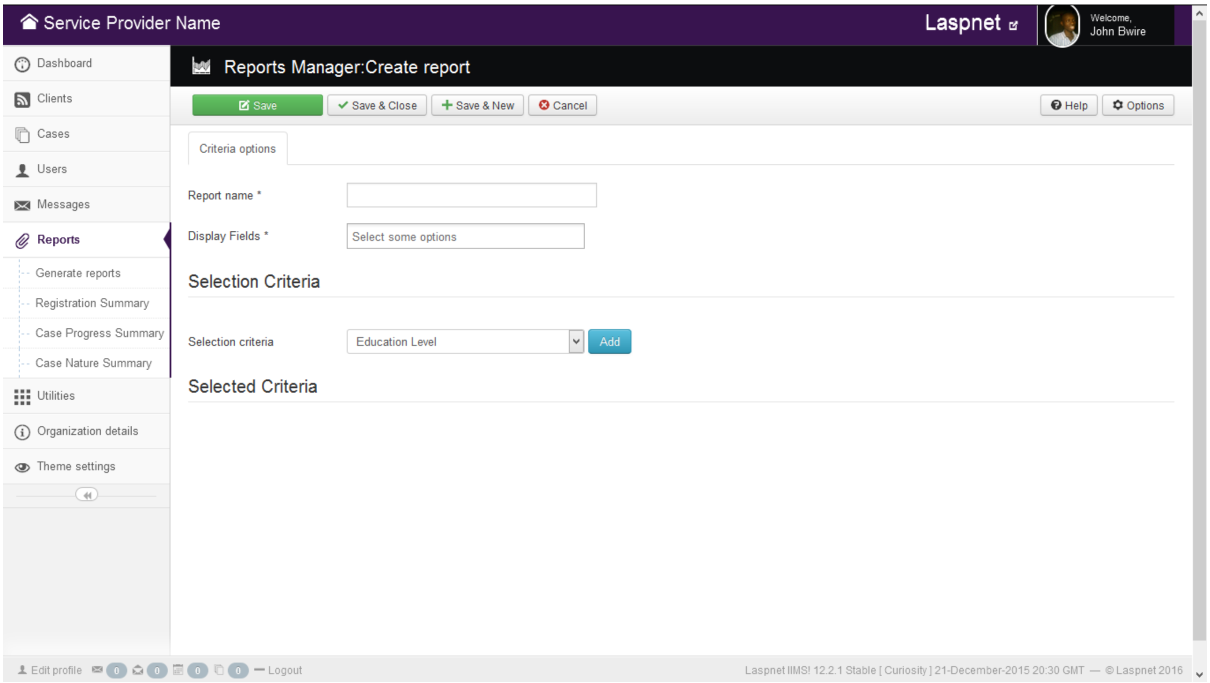
How to Access

Navigate to the the Reports Manager. To create a new Client/Case report, click on the *Add New* icon in the toolbar. To edit an existing report, click on the report's Name or check the report's checkbox and press the *Edit* icon in the toolbar.

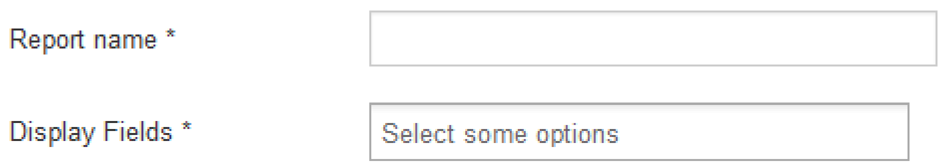
Description

This is where you design a report basing on your preferences.

Screenshot



Name and display fields

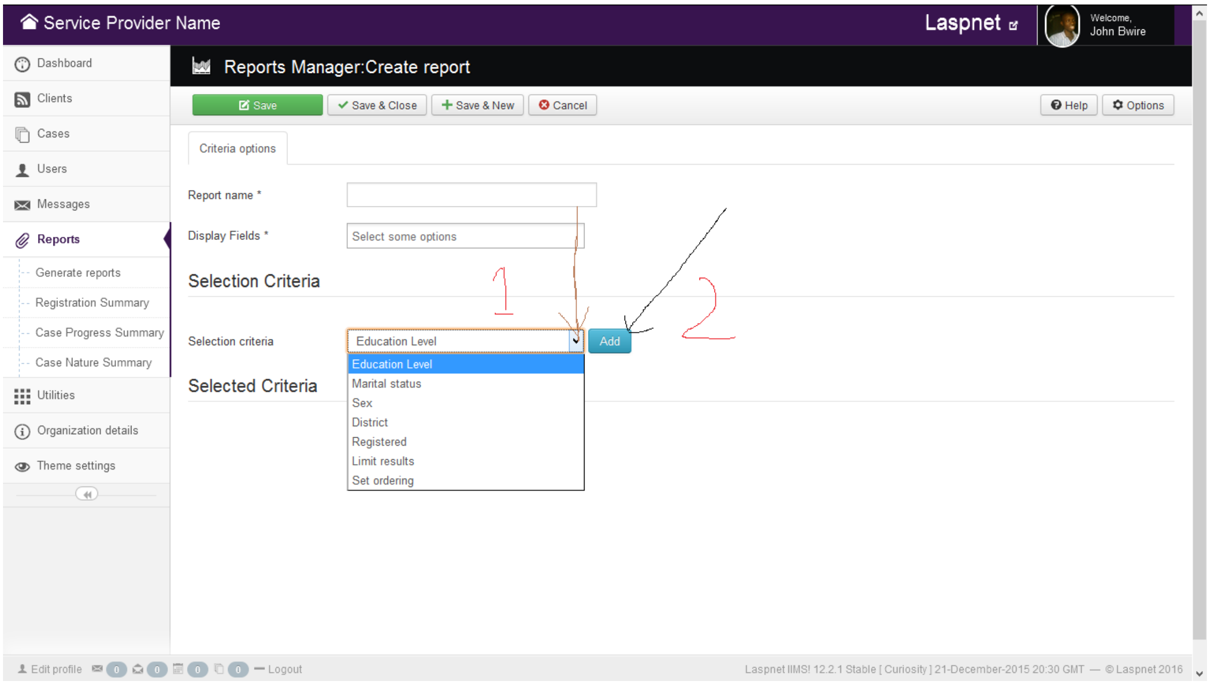


- **Report name.** The name of the report to easily identify it.

- **Display fields.** These is the information about a particular client or case forexample name,nature of case,district etc. This options helps you to only show on the report the fields that you want

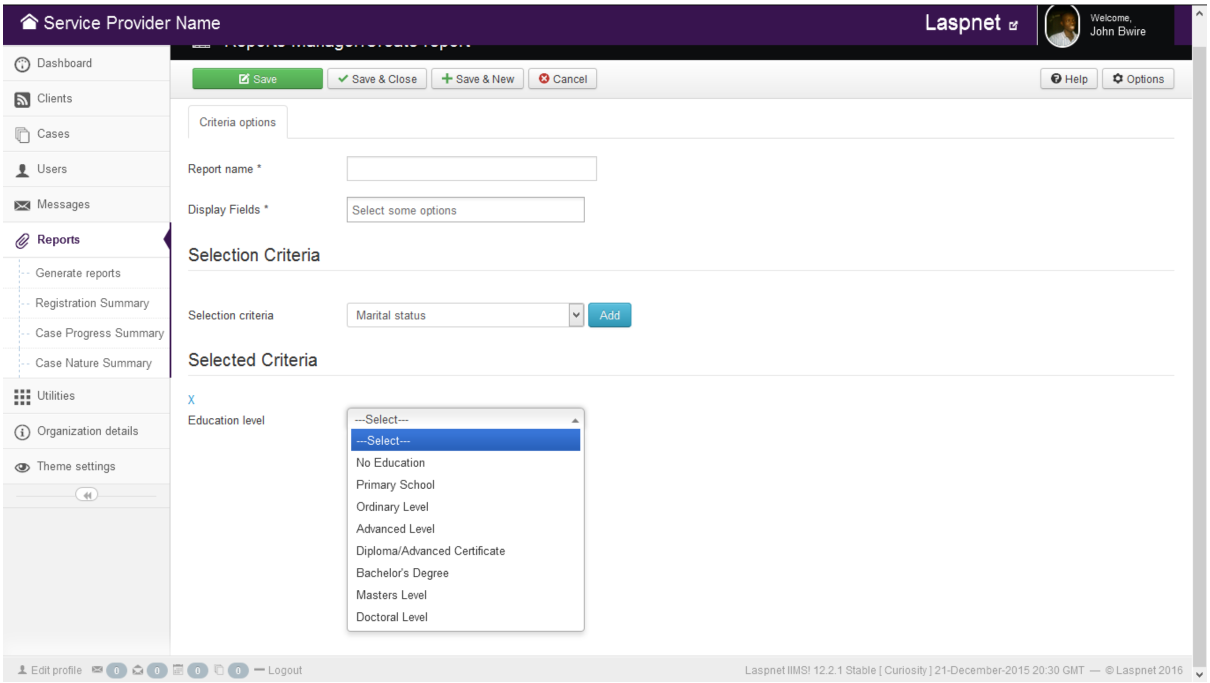
Selection Criteria

Selection criteria consists of the filter parameters that help you to define how your report should be generated. This further helps to narrow down the results to a more accurate view that is helpful in analysing trends. Using the dropdown you choose a parameter and then click add, after clicking the parameter, it will display in the selected criteria tab from where you define how the report should be generated.

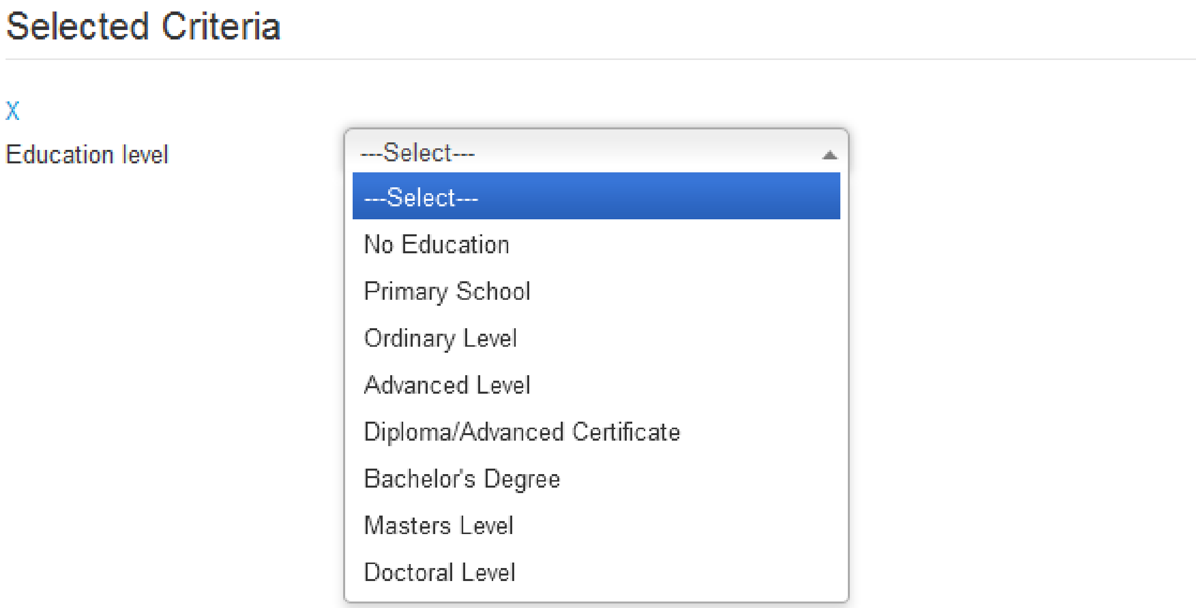


From the above, you start from step 1 and then proceed to step 2 for every field selected

Selected Criteria



The results from the selection criteria will appear here. From this point you define how the report must be generated



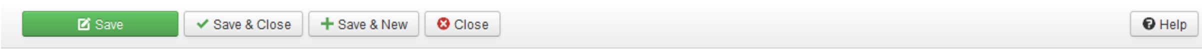
Using the above criteria, if forexample you selected "Primary School" it would imply you want all clients whose education level is primary school

Note: Use the "x" prepending the field to remove unwanted fields. However always make sure you reset or clear any selections. Forexample if you no longer desire education level to be in the criteria list, you should first make sure the value is set to --select-- and then you hit "x" icon. Failure to do so may result in misleading results.

Toolbar

At the top left you will see the toolbar for a **Edit Report** or **Create Client/Case report**

Manager: Edit Client/Case report:



<translate>

- **Save:** Saves the report and stays in the current screen.</translate>

<translate>

- **Save & Close**. Saves the report and closes the current screen.</translate>

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- **Save & New**. Saves the report and keeps the editing screen open and ready to create another report.</translate>
- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made.</translate>
- **Help**. Opens this help screen.</translate>

Manager: Create new Client/Case report:

<translate>

- **Save:** Saves the report and stays in the current screen.</translate>

<translate>

- **Save & Close**. Saves the report and closes the current screen.</translate>

<translate>

- **Save & New**. Saves the report and keeps the editing screen open and ready to create another report.</translate>

<translate>

- **Cancel/Close**. Closes the current screen and returns to the previous screen without saving any modifications you may have made.</translate>

- **Help**. Opens this help screen.</translate>