



## Odyssey New Computer Setup.

Mark S - 2022-07-06 - Odyssey

### **ODYSSEY New Computer Set Up**

#### **OUTSIDE ODYSSEY**

1. Verify that Connect to Printer icon is on the desktop
2. Verify WORD is on the computer
3. Open WORD
  1. Add the Lock Button and Quick Parts Icon to Your Quick Access Toolbar

#### **WITHIN ODYSSEY**

##### ***Outside A Case***

1. Set Calendar View
2. Set Resource Schedule View
3. Set Default Address Type
4. Set Preferences on Gear Icon
  1. Menu Preferences
    - Menu Memory Enabled
5. Display Preferences
  - Main Content Scale
    1. 100% or size as needed for you
6. Night Mode (or Ctrl F7 from any screen in Ody)
7. Tool Preferences
  - Microsoft Word Spelling Checker
8. Product Preferences
  - Enable Page Text Selection
  - Track Site Name
  - Track User Name

##### ***Inside A Case***

1. Parties Tab
  1. Show All Connections

2. Events Tab
  1. Related Events
3. Hearings Tab
  1. Show All Hearings
  2. ✓ Hearing Comments
4. Financial Tab
  1. ✓ Show Categories with No Activity
5. Create Task
  1. Set Task Queue Filters to Own Node
6. Forms
  1. ✓ Print Preview

## **Outside Odyssey**

### **VERIFY CONNECT TO PRINTER ICON IS ON DESKTOP (also need in courtrooms)**

1. Go to your Desktop
2. Look for the Connect to Printer Icon - if it is there, you are all set - If it is not there, go to Adding Connect to Printer Icon to Desktop



### **ADDING CONNECT TO PRINTER ICON TO DESKTOP (only if it is not there)**

1. Go to File Explorer
2. Click on the Vtads Temp (V:) drive
3. Double click on the 1-NewHire folder - this will run a script that will add the Connect to Printer Icon to your desktop



## **ADD THE LOCK BUTTON & QUICK PARTS ICONS TO WORD QUICK**

### **ACCESS TOOLBAR**

1. Open WORD - if you don't have Word on your desktop or taskbar then go to step 2 - if you do have Word then skip to step 3
2. Click the Search icon or the Start Icon on your taskbar, start typing Word, when the Word App appears, click it



1. Go into any WORD document, or start a blank WORD document
2. On the Quick Access Toolbar (usually the blue strip at the top of the Word), click on the dropdown arrow
3. Choose **More Commands** from the dropdown



1. Customize Quick Access Toolbar dialogue opens
  1. Choose **Quick Access Toolbar**
  2. Choose **All Commands** from dropdown at Choose Commands from
  3. Scroll down to *Quick Parts(Explore Quick Parts)* - \*Note the commands are alphabetical
  4. Click **ADD**
  5. Scroll to *LOCK* with a PADLOCK symbol next to it (the commands are alphabetical)
  6. Click **ADD**
  7. Click **OK**



1. Your Quick Access Toolbar will now have the quick parts icon and a padlock icon on it



## Within Odyssey

### **Outside a Case**

#### SET CALENDAR VIEW (first time only) - Shows the Whole Court Calendar

1. Go to Tools > Scheduling > View Calendar or at Menu, type View Calendar
2. At Select Calendar
  1. View = Monthly
  2. Owned by Location = County you work at
  3. Calendar = Select appropriate node from the dropdown
1. Continue



#### **SET RESOURCE SCHEDULE (first time only) - Shows Your Schedule Only (or anyone else you choose)**

1. Go to Tools > Scheduling > View Resource Schedule, or at Menu, type View Resource Schedule
2. At Select Resource
  1. View = Monthly
  2. Owned by Location = County you work at (use the selector at the end of the field and click on the county name not the little box next to it)
  3. Resource Type = Your role (i.e. Judicial Officer, Assistant Judge, Magistrate...)
  4. Resource = You
  5. Color = Choose any color to display your schedule in (you have to choose a color, this can be helpful if you also choose to see someone else's schedule - you can differentiate by color)
1. Continue



#### SET DEFAULT ADDRESS TYPE TO NON-STANDARD U.S. ADDRESS FORMAT

1. Go to Tools > My Account > Default Settings > Set Default Address Type
2. Select Non-Standard Address
3. Save



## SET PREFERENCES

1. Click the Gear icon
  2. Select Preferences
  3. Menu Preferences
    1. Select Menu Memory to have Odyssey retain the last path you followed through a menu
  4. Display Preferences
    1. Change the Main Content Scale percentage and the Command Bar Text Size if desired
  5. Tool Preferences
    1. Select Microsoft Word Spelling Checker
    2. \*You do not need to do anything with Default Image Printer and Default Forms Printer
  6. Product Preferences
    1. Select Enable Page Text Selection
    2. Track Site Name
    3. Track User Name
1. Continue



## ***Inside a Case***

### PARTIES TAB - Show All Connections

1. At Show select All Connections



### EVENTS TAB - Set Related Events View and Other Filters

1. Select the funnel
2. View = Related Events
3. Sort = Choose Date Order or Reverse Date Order as preferred
4. Show = Select your preferred number of events you want to see before you need to  
Next to go to the next page
5. Click Find to filter by your preferences
6. Click Save Filters
7. Select the funnel to make the filter screen go away

\*NOTE: Filters must be set once per case category (Criminal, Civil, Family, Probate/Mental Health) on a computer, if you work on more than one computer, you will need to set these filters once per computer, then your preferences will be saved



#### HEARINGS TAB - Show Hearing Comments

1. At Show select All Hearings
2.  Hearing Comments



#### FINANCIAL TAB - Show Categories with no Activity

1.  Show Categories with no Activity



#### SET TASK QUEUES TO FILTER BY CASE NODE

1. Anywhere in a case, select Create Task
2. Choose any task type
3.  **Filter Queues by Case Node**
4. Exit



## FORMS – Set Print Preview

1. Select Forms
2. Select Document box opens, ✓ Print Preview
3. Exit



If the computer is not new and this is a re-install make sure to follow the below:

Things that need to be reset when profile rebuilt (some of them... this is not an inclusive list)

**QUICKPARTS!!!! Must be saved by judge or staff in a Word document in advance!!!!!!!!!!!!**

Default Fonts and size of text in Word

Default Fonts and size of text in email

View in email

Default printer

Web browser preference

Web favorites (Westlaw, court forms, etc)

Westlaw user name and password

Pins to task bar

Webex and Teams must be downloaded again

Signature in Adobe

Odyssey calendar default

Odyssey order of items in each docket (eg reverse chronological)

Odyssey printer box in Forms

Also see separate document from Chasity re other Odyssey steps that are needed

Tags

Odyssey

Odyssey profile Rebuild

Odyssey Re-Install

**Attachments**

- [Rebuilt-Profile.docx \(930.85 KB\)](#)