eCourts

EXPANDING ACCESS TO JUSTICE

JUDICIAL BRANCH of NORTH CAROLINA

GENERAL COURT of JUSTICE

SUUM CUIQUE TRIBUERE

eDiscovery - Quick Reference Guide

Prosecutor

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Introduction

eDiscovery, a Tyler Technologies product, is a discovery management system where discovery can be shared and maintained between Law Enforcement, Prosecutors and Defense Attorneys. eDiscovery utilizes Box.com which improves the performance of file management. The maximum file size is currently limited to 150GB **<u>per file</u>**, and there is **<u>no limit</u>** to the number of files that can be uploaded.

Purpose of This Guide:

- Clarify terminology
- Assist with navigating through the system
- Step-by-step guidance with business processes essential to your role

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NOTES

Terminology – Incident Status/Tabs

New Lea case	New LEA incidents receive a blue status.
Subsequent files	Supplemental LEA incidents receive an orange status.
New discovery tab	New LEA incidents land here and are viewable to users with Intake role.
Assigned to me tab	Incidents, assigned to the Intake user, will display in this tab.
Needs review tab	Displays incidents to the Manager role user when the following conditions are met: Files have been transferred to ready for review tab. The user is assigned to the incidents Prosecution section. Intake is marked complete.
My incidents tab	Displays incidents assigned to the Manager user role. Assignments are completed within Case overview.

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NOTES

- **The term "Incident" replaces the term "Binder" that was utilized in the previous version.**
- **Incidents submitted from a LEA will land on the New discovery tab. To be able to see and work this tab, a user must have the Intake role.**
- **To remove any LEA incidents (from New discovery) the user clicks “Assign to me” located in upper right corner of the incident.**
- **Another option to remove LEA incidents is transferring all files to the Ready for review tab and clicking the Mark intake complete button.**

Terminology – Incident Status/Tabs

Requests	Will display requests between the LEA and Defense.
Recently viewed	Displays recently viewed incidents.
New files	This tab is the default for files to land.
Ready for review	This tab displays files that have been transferred from the default New files tab.
Do not share	This tab is used to transfer files that do not need to be released to the defense.
Available to defense	This tab is used to transfer files that need to be released to the defense.

NOTES

New user role definitions:

- **Intake** roles can see and process new discovery that has been submitted by LEA. Intake users *do not* have the rights to release files to the defense.
- **Manager** roles can not see, or process new files submitted by LEA. This role can review files after the incident intake is marked complete. This role allows users to mark files available to defense for release.
- **Supervisor** role allows the ability for a user to expunge or merge incidents. This can be granted upon hiring authority approval/help desk ticket.
- **Intake and Manager will be granted to all users during the cutover process.**

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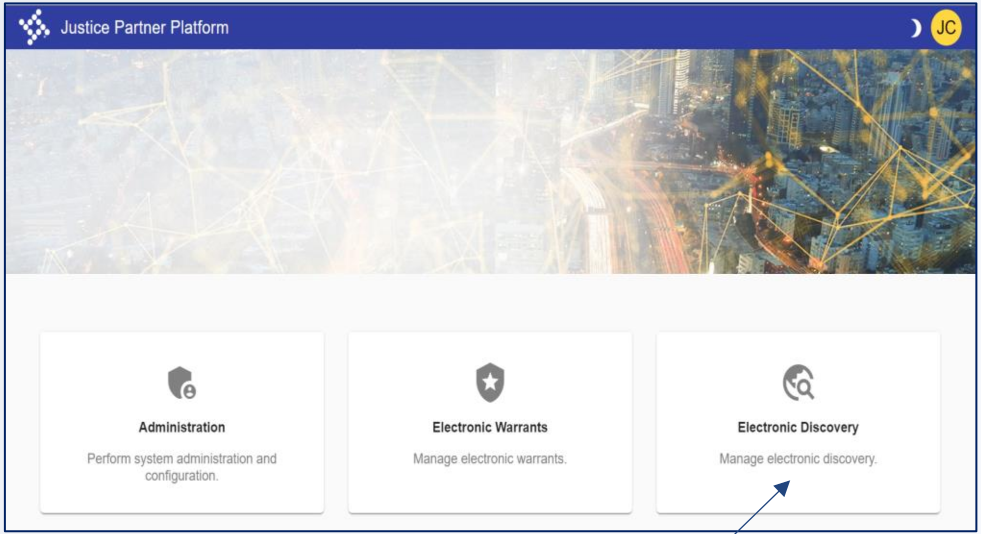
Accessing & Logging into eDiscovery

Step 1	From Google Chrome or Microsoft Edge, Navigate to web address https://justice.tylerhost.net/
Step 2	Enter @nccourts.org username > Click Next > Enter windows Password > Click Sign In
Step 3	Select Electronic Discovery from Justice Partner Platform



Electronic Discovery

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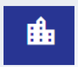
NOTES

Icon Guide

Talking Ts icon navigates back to the dashboard/homepage

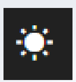
Manage icon navigates back to the dashboard/homepage

Search icon allows searching of case discovery



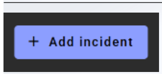
Courthouse icon displays organizations associated to the user

Half moon icon will toggle dark mode



Sun icon will toggle light mode

Profile icon will allow user to sign out



Add incident button starts the add new incident process

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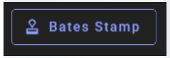
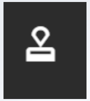
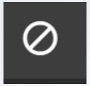
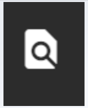
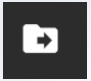
NOTES

Icon Guide Con't

	Allows the ability to initiate the bates numbering batch job
	Allows the ability to add redactions
	Allows the ability to apply the redactions
	Transfers a file to the Do not share tab
	Converts a non searchable document into a searchable document allowing redaction
	Allows the ability to download a file
	Allows the ability to move a file to a different folder

NOTES

- **File-level actions (e.g., Redact, Download, etc.) can be processed by enabling a files checkbox and clicking File Actions**

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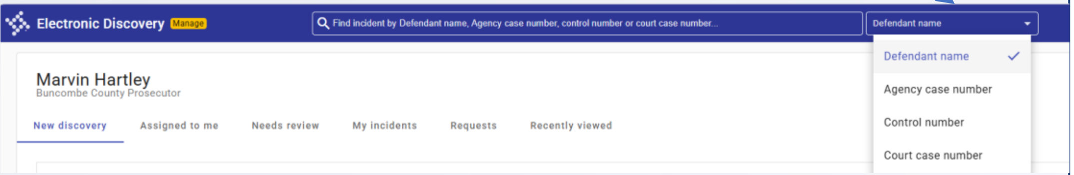
Search Functions

Search by Defendant name or Agency case number



NOTES

- **Choose which field you would like to search on from the right-side menu then simply key in a Defendant name, Agency case number, Attorney Manager Control number, or Court case number and press the keyboard Enter key. There are no search or submit buttons to click.**

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Completing Intake and Preparing Files for Defense

Step 1	From the landing pages **New discovery** tab, an intake user can single click any part of the incident to open it.
Step 2	From New files tab, review any files needed (Files will open in a separate browser tab). LEA notes can be viewed by clicking the right-side Notes tab.
Step 3	To end the intake process, the intake user role must transfer all files to the **Ready for review tab.** This can be completed with one click when the user clicks **Mark all ready for review** button. After files have migrated over a tab, the user can click the blue **Mark Intake Complete** button to end the intake process.
Step 4	To update all other incident metadata, click the incidents **Case overview** section located on left-side. **Note -** From **Case overview**, users can update Prosecutor assignments, Court case numbers, add additional defendants, and Defense Attorneys.
Step 5	Click **Case overview** to add a defense attorney.
Step 6	From the **Defendant** section, click the row of the Court case number if its present. The **Add/edit cases and attorneys** dialog will appear where the user can search on the attorney's name or email.

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NOTES

Completing Intake and Preparing Files for Defense Cont'd

Step 7	If No Court case number is present, click the **Actions** button from the Defendant section. User will be prompted to select Add control #, court cases, or attorneys. Please enter all relevant details here.
Step 8	After the defense attorney is added, the user clicks the **Mark all files available** button to send a release to the defense attorney.

NOTES

- **Any files that do not need to be released can be transferred to Do not share tab.**
- **Defense attorneys will receive an automated email notifying them of the released discovery.**

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Manually Creating an Incident

Step 1	From the user's dashboard, click the **Add incident** button.
Step 2	Enter an Agency case number **OR** Court case number into the first required box, then select (or search) the name of the LEA. ***Recommend if adding Court case number to add the 3-digit county code to the end***
Step 3	Click the **Create** button.
Step 4	From the Case overview screen, the user can enter Prosecutor assignments, Defendant and Court Case Number details, and Defense Attorney details. To add any notes, the user can click the right-side Notes tab.
Step 5	To add files the user clicks the incidents **Manage discovery** section.
Step 6	From the New files tab, click the **Upload files** button. From the Submission dialog, click the plus sign **(Add)** icon to upload files or folders.

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NOTES

- **Required fields are marked with an asterisk*.**
- **The maximum file size is currently limited to 150GB per file, and there is no limit to the number of files that can be uploaded.**

Manually Creating an Incident Cont'd

Step 7	After attaching files, click the **Upload** button.
Step 8	After all files complete uploading, then click the **Close** button from the Success page.
Step 9	From the File Submission screen, click the **Submit submission** button.

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Merge & Expunge Incidents

Step 1	To MERGE an incident, first search and open the incident.
Step 2	From the incident, the user would like to merge, click the upper right ellipses icon (i.e., Stoplight icon) and select **Merge case.**
Step 3	From the Merge dialog, the user would search for the case incident by defendant name or agency case number.
Step 4	After the results return, select the radio button next to the destination case incident you are merging the files into. To confirm the merge, user must select the blue **Merge case** button.
Step 1	To EXPUNGE an incident, first search and open the incident.
Step 2	From the incident, click the upper right ellipses icon (i.e., Stoplight icon) and select **Expunge agency case.**
Step 3	User must confirm expunge by typing in the word “delete”. An automatic email will be sent to the user's inbox after the expunge job completes.

NOTES

- **User must have the Supervisor role to merge and/or expunge incidents.**
- **System will not allow a merge if the source incident has files available to defense.**
- **System will allow a merge if the destination incident has files available to defense.**

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