USING RESEARCH ASSISTANT
N.C. CONFERENCE OF SUPERIOR COURT JUDGES
October 21, 2008

PART 1: BASIC SKILLS

I.   <u>DO YOU HAVE VERSION 5.1.8.15</u>? LOOK FOR "HELP," "ABOUT."
II.   THE TOP FOUR CHOICES:
        a. LIBRARY
        b. QUICK PREP
        c. TOOLS
        d. HELP CENTER
            <u>Problem</u>: How do you move from "tools," "quick prep", "help center"
            back to Library? <u>Solution</u>: There are two "library" buttons! Click on each
            to show the library menu.
III.   <u>TOOLS</u>
        a. Calculators
                i. Sentencing
                        1. Choose a class of crime
                        2. Determine prior record level
                        3. Obtain minimum and maximum months numbers
                                a. Changing your mind.
               ii. Math
              iii. Attorney fees
                        1. setting the rate
                        2. entering number of hours
IV.   <u>LIBRARY</u>
        a. What's in it and what's not
                i. "Research Assistant Contents"
               ii. "User Documents". You create and store them. See Part B,
                    section I.c. below.
              iii. Pattern jury instructions
               iv. Reference
                v. Bench Books are not currently in the RA. They are in the "Trial
                    Court Desktop." Is "TCD" on **your** computer?
               vi. Please Report errors and glitches to CX Corporation
              vii. Let the Pattern Jury Instruction Committee about them also
        b. COLLAPSE, EXPAND
        c. FINDING THE INSTRUCTIONS LISTS
        d. READING AN INSTRUCTION: Select, then "Read", or use the old
            "double click" trick
        e. SEARCH
                i. Finds words and phrases
        f. LOOK UP
                i. Finds numbers

1. Choose your volume of the library. <u>Problem</u>: you want to find civil instruction 101.10. <u>Solution</u>: First select "NC Pattern Jury Instructions Civil Volume." Then type "101.10" in the "Look Up" field.

   g. ADDING TO QUICK PREP
      i. Add current selection
      ii. Drag it over, lay it on top of the instruction that you intend will follow the one you dragged.
   h. MOVING INSTRUCTIONS WITHIN THE QUICK PREP LIST
      i. Drag it around
      ii. Use the up and down buttons on the left of the quick prep list
   i. ADDING INSTRUCTIONS TO BOOKMARKS
   j. TAKING BOOKMARK INSTRUCTIONS TO QUICK PREP

V. <u>QUICK PREP</u>
   a. BUILDING PREVIEW
      i. Choices: "Remove the following," and "Other Choices." *Note: "Header/Footer" and ""Add Titles" are mutually exclusive when one of them has been chosen. To remove the PJI number and caption, do not click on either one, or at least be sure that "Add titles" is not chosen.*
   b. EDITING, READING FROM THE "PREVIEW" SCREEN
   c. CLEAN UP
   d. OOPS, NEED TO MAKE CHANGES. REBUILDING.

<u>Problem</u>: Defendant is charged with PWSD cocaine, Sale, and possession of paraphernalia. Assemble the charge in quick prep. During the evidence the defense of entrapment is developed. You add the entrapment defense to the quick prep combination. At the charge conference, you <u>build preview</u> and then <u>clean up</u>. Then the defendant requests the entrapment defendant as you anticipated. But the state objects and shows law that convinces you entrapment should not be submitted as a defense. How do you remove that instruction from the charge in its clean up version?

<u>Solution</u>: return to library. Delete entrapment instruction in the quick prep field. Again click on build preview. Question box: do you want to rebuild? Yes. Proceed to click on "Clean up." Answer questions "yes." Now you see the charge in its entirety, ready to save as a document if you wish. If you do not wish to save, you can edit and read from the screen

VI. SAVING AS A DOCUMENT: BASIC INSTRUCTIONS FOR A WORD DOCUMENT.

VII. <u>PROBLEMS, QUESTIONS</u>

PART B: ADVANCED SKILLS.
October 21, 2008, 3:30 P.M.

*(NOTE WELL: **QUESTION**: WHY ARE WE LEARNING ALL OF THIS DOCUMENT CREATION TECHNOLOGY? **ANSWER**: THE INTERESTS OF JUSTICE ARE PROMOTED IF WE CAN SHARE THE DOCUMENT WITH OTHERS IN A PRESENTABLE FORM. TRIAL LAWYERS (BLESS THEIR HEARTS) DO A BETTER JOB IF THEY CAN SEE A DRAFTED DOCUMENT BEFORE OR AT THE CHARGE CONFERENCE. THE JUDGE BENEFITS BY HAVING A COMPLETE DOCUMENT FROM WHICH TO INSTRUCT THE JURY. THERE IS CURRENTLY A DIVISION OF OPINION ON THE ISSUE OF GIVING THE JURY THE PRINTED INSTRUCTIONS IN ADDITION TO THE VERBAL INSTRUCTIONS FROM THE BENCH. HOW DO YOU FEEL ABOUT THAT ISSUE?)*

I. <u>SAVING A DOCUMENT IN QUICK PREP.</u>
   a. Complete the following steps:
      i. Assemble need instructions;
      ii. Put instructions in order;
      iii. Build preview;
      iv. Clean up;
   b. "Save Button" : upper left hand corner
      i. Where does RA propose to save it?
         1. "My documents"?
         2. "Temp"?
         3. Somewhere else?
      ii. You decide where to save it!
      iii. What name shall it have?
         1. "Research"?
         2. You name it! Here's a suggestion:
            a. Compiling your saved instructions in WORD
            b. Set up a folder: "Crim charges", "Civ charges"
            c. Use a format for file names (the following is just an example):
               i. Type crime or type civil cause
                  1. Ex: AWDWITKISI
                  2. Ex: MVA pi pp Contrib
               ii. Defendant's name or Plaintiff's name
               iii. County
               iv. Date

      iv. What type of document?
         1. "DOC" ain't an option.
         2. rtf, pdf, html ?
         3. rtf means "rich text format". For most of us, that's the only choice.

   c. "Save to Database" is another option. The document will be saved to the User Collection of Research Assistant.
      i. Take all the steps shown in I.a., i. – iv., above.

    ii.   Click on the "Save to Database" button, at top, second button from the left

    iii.   Enter a unique name for the document.

    iv.   "You can recall, export, or edit this document by adding to the Quick Prep Collection or selecting Export from the main menu." Now as to "edit", I beg to differ.

II.   <u>EDITING A CHARGE</u>.

    a.   You "Build Preview" and want to edit text, or add or delete an instruction.
        i.   Go back to the library view and select and add to the quick prep collection. Then "build preview" again. (Now it's "rebuild.")
        ii.   Go back to the library view, highlight an instruction to be removed in the quick prep collection, and "add current selection." Then "build preview" again.
        iii.   You cannot successfully edit text at the "Build Preview" screen. It will not survive the clean up.

    b.   You "Build Preview" and "Clean up" and then want to edit the content.
        i.   Go right ahead. Now you can delete alternative paragraphs, enter date of offense, etc.

    c.   You build a preview and clean it up and then want to add or delete and instruction.
        i.   Go back to the library view and select and add to the quick prep collection. Then "build preview" again. (Now it's "rebuild.")

    d.   You build, you clean it up, you save, and then you want to edit text or delete an instruction.
        i.   Just like any other "Word" document.

    e.   You build, you clean it up, you save, and then you want to add an instruction.
        i.   Choose to review the document.
        ii.   Go back to RA, library, select an instruction, double click, click on copy on bar at top, go back to your saved document, choose your location, click paste.

III.   <u>PRINTING A CHARGE</u>.

    a.   CONNECTED TO A PRINTER
        i.   You want to print the instructions in the "Quick Prep" menu without any editing, before building a preview: just click "Quick Print."
        ii.   You can print from the "Build Preview" screen.
        iii.   You can print from the "Clean Up" screen.
        iv.   You can print after "Saving" the document.

    b.   NOT CONNECTED TO A PRINTER????
        i.   Save the document to your computer, and do it later when connected to a printer.
        ii.   Save it to a portable hard drive (a flash drive) and take that to another computer with a printer attached.
        iii.   E-mail it to someone who has a printer.

1. The clerk sitting beside you.
2. The closest judicial assistant.
3. Anybody who can print it quick!
4. E-mail from your hotel room. (Planet earth to Planet TAO).

IV: <u>EXPORTING</u>