

**FJC Bankruptcy Courtroom Use Study  
Report to the CACM Committee**

**Technical Appendix 7**

**About DISCUS-B  
Data Input System for the Courtroom Use Study-Bankruptcy**

**Federal Judicial Center  
2010**

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## What Is DISCUS-B?

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DISCUS-B is the Data Input System for the Courtroom Use Study-Bankruptcy. It is a software application built in Lotus Notes. Court staff who record information for the Bankruptcy Courtroom Use Study will record the information in DISCUS-B.

The software application has two components—referred to as “modules.” The Scheduling module is the place where court staff record certain types of events scheduled for the future. The Actual Use module is the place where court staff record events that have taken place in courtrooms and certain other events that happened in other places.

The following sections describe more fully the DISCUS-B capabilities and the study requirements.

## Accessing DISCUS-B

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DISCUS-B is accessed via the Lotus Notes Client. When you open DISCUS-B, the main menu appears. Below is a snapshot of the main menu page.



There are six buttons on the DISCUS-B main menu. Click on a button to select the desired function.

- **Enter Scheduling Data:** Use this button to record all scheduling data.
- **Enter Actual Use Data:** Use this button to record all actual use data.
- **About the Study:** Use this button to access a brief description of the Bankruptcy Courtroom Use Study.
- **Contacts:** Use this button to find contact information for your FJC liaison.
- **Help:** Use this button to find a copy of the training materials.
- **Exit:** Use this button to close DISCUS-B.

All persons in your district with DISCUS-B privileges have access to every record in DISCUS-B. They can record, edit, cancel, and delete records for all judges and locations.

## DISCUS-B: Scheduling

### About the Scheduling Module

The Scheduling module is the place in DISCUS-B where you must record all events scheduled for your judge's courtroom and certain other events scheduled for other places. Scheduling data are information about the expected use and availability of courtrooms and other spaces that serve as courtrooms. You will record scheduling data in DISCUS-B when you learn that an activity or event will take place *in the future*. You will also record scheduling data in DISCUS-B when you know *in advance* that a courtroom will *not be available* for use.

### Creating Scheduling Records in DISCUS-B

The Scheduling module includes a Calendar View and a Detail View. The Calendar View is the place to start entering scheduling information, since this is where you select the date and place where events will be held. You will then proceed to the Detail View, where you can record more specific information about the event. Each of the views is described below.

### The Scheduling Calendar View

Click on the "Enter Scheduling Data" button on the main menu. DISCUS-B will open to the Calendar View. The example below shows the day view for July 16, 2010, in the Federal Building's Courtroom A.

The screenshot shows the DISCUS-B Scheduling Calendar View for Courtroom A. The interface includes a navigation bar with "New Event" and "Go to" buttons, and a "Courtroom A" header. The main area displays a calendar for July 2010, with the 16th of July highlighted. Below the calendar is a list of time slots from 2 am to 7 pm. The left sidebar contains a navigation menu with categories like "Bankruptcy Courthouse", "Federal Building", "Other Site", and "Other Views".

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

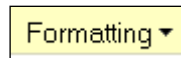
Time
2 am
3 am
4 am
5 am
6 am
7 am
8 am
9 am
10 am
11 am
12 pm
1 pm
2 pm
3 pm
4 pm
5 pm
6 pm
7 pm

There are several features to note about the Calendar View:

1. The name of the module appears in the upper left corner of the screen—in this case, “Scheduling Data.” Always check to be sure you are recording data in the correct module. In addition to the name, notice the color. The Scheduling module is highlighted in blue; the Actual Use module is highlighted in green.
2. A courtroom name appears on the left and also at the top of the screen. This is your default courtroom—that is, the one your court liaison identified as the room for which you would most often be entering data. Most likely, it is your judge’s assigned courtroom. When you first open the Scheduling module, DISCUS-B will present the Calendar View for your default courtroom.
3. On the left below the monthly calendar are listed the courtrooms and other locations where events might take place in your district. Notice that the rooms in your version of DISCUS-B have been customized for your district.
4. The Calendar View defaults to today’s date.
5. At the top is a button for “New Event,” which you will click on when you want to record an event that is being scheduled for your judge’s calendar. You can also create a new event and automatically schedule a one-hour block of time for that event by double-clicking on the appropriate hour in the daily Calendar View. Also at the top is the “Go to” button, which is used to open, in a separate window, the Actual Use module, the Help screen, or the Main Menu.



6. The “Formatting” button on the upper right allows you to choose the “Summarize” option, which gives you a detailed view of events you’ve scheduled.



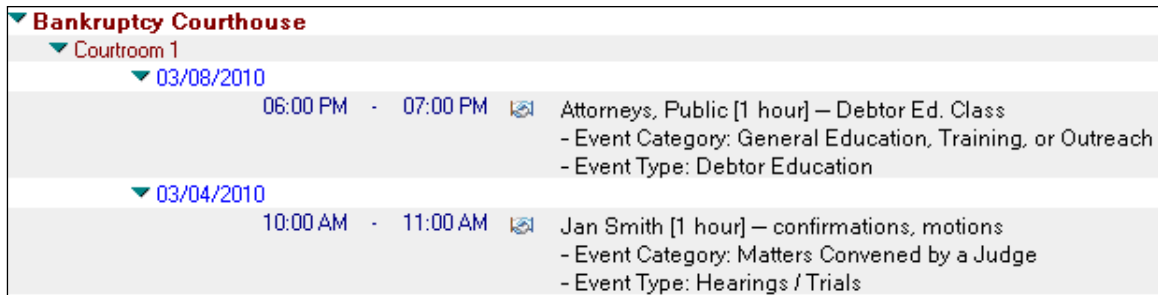
7. The “Other Views” link on the lower left allows you to see the data in different ways—for example, by data recorder, room, or judge.



8. The “Link Status” option under “Other Views” can be used to see whether scheduling records have been linked to corresponding actual use records (see



illustration at 7, above). If there is a scheduling record in DISCUS-B, there must be some resolution of the scheduled event—that is, it must be resolved through an actual use record, or it must be cancelled or rescheduled. If a scheduling record is linked to an actual use record, a handshake icon will appear, as shown below.



9. The “Unresolved Events” option is a very important feature (see illustration at 7, above). It allows you to see any events you have scheduled for dates in the past but you haven’t yet “resolved”—that is, events that haven’t been either cancelled, rescheduled, or linked to an actual use event. This is a helpful view for checking whether you’ve entered an actual use event for every event you’ve scheduled.
10. The “Cancelled Events” view allows you to see all the scheduled events that have been cancelled (see illustration at 7, above). If you need to restore a previously cancelled event, you can pull up the event under this view and click on “Restore.”
11. The “Quality Control Reports” view displays records that do not conform to the expectations or requirements for recording data in DISCUS-B. Each Quality Control Report is available in both the Scheduling module and Actual Use module. Each of these reports summarizes records in a different way. Most start by grouping events by an anomaly not expected in the data records—for example, records on weekends or holidays. All anomalous records included in these reports should be either corrected or approved as correct by the court liaison.



## The Scheduling Detail View

This is the view where you will record specific information about an event you are scheduling for a future date. All fields are required, and you can't save a record until you have completed all fields. Since several of the items in the Detail View are defaults, you will have to record only a few pieces of information in this view:

1. Event category and event type
2. Calendar and case information
3. Event description
4. Whether the courtroom was the judge's assigned courtroom and, if not, why not
5. Whether the need to use the selected room affected the date or time of the scheduled event, and if so, how

The principal features to note in the Detail View are as follows:

1. The "General Information" section of this view identifies the site, room, date, and time for the event being scheduled. These items are carried over from the Calendar View, but you can change them by using the pull-down menus in this section.

General Information	
*Site Name:	Federal Building
*Room Name:	Courtroom A
*Date:	07/16/2010
*Start Time - End Time:	03:00 PM to 04:00 PM 1 hour
*When Was It Known That This Room Was Needed on This Date?	07/05/2010

2. The "Event Information" section (pictured at the top of the next page) asks you to identify the "Event Category" and "Event Type" for the event you're scheduling. If you've chosen "Matters Convened by a Judge" as the event category, DISCUS-B requires you to record the event's calendar information and case information.

Event Information	
*Event Category:	<input checked="" type="radio"/> Matters Convened by a Judge <input type="radio"/> Other Case-Related Activity <input type="radio"/> Bankruptcy Court Ceremony <input type="radio"/> General Education, Training, or Outreach <input type="radio"/> Maintenance (during normal court hours) <input type="radio"/> Special Circumstances: Room Cannot be Used or Judge Away <input type="radio"/> Other Use
*Event Type:	<input type="radio"/> Hearings / Trials <input type="radio"/> Conferences (e.g., status, settlement, etc.) <input checked="" type="radio"/> A Mix of Event Types (e.g., both hearings and conferences) <input type="radio"/> Other Matters Convened by a Judge
*Calendar Information:	<input checked="" type="radio"/> Regularly Scheduled Calendar <input type="radio"/> Specially Set Time
*Case Information: Identify the types of cases included in the proceeding (check all that apply)	<input checked="" type="checkbox"/> Chapter 7 <input type="checkbox"/> Chapter 9 <input checked="" type="checkbox"/> Chapter 11 <input type="checkbox"/> Chapter 12 <input type="checkbox"/> Chapter 13 <input type="checkbox"/> Chapter 15 <input type="checkbox"/> SIPA (15 U.S.C. Sections 78aaa et seq) <input type="checkbox"/> Adversary Proceedings <input type="checkbox"/> Other

- The “Event Description” section asks for a brief description of the event, such as “status conference” or “emergency hearing.” It is a free text field.

*Event Description: (brief)	<input type="text"/>
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- The name of the judge is carried over as a default. You can change it by using the pull-down menu or entering the correct name manually.

*Judge Convening the Proceeding:	<input type="text" value="Smith, Jan"/>
<b>m Selection Informa</b>	<ul style="list-style-type: none"> <li>Smith, Jan</li> <li>Johnson, William</li> <li>Jones, Robert</li> <li style="background-color: #000080; color: white;">Smith, Jan</li> <li>Visiting Judge</li> <li>Other Judge</li> </ul>

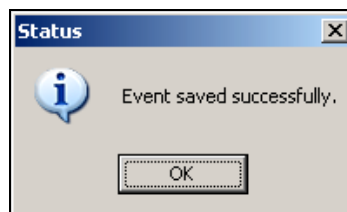
- DISCUS-B assumes the event is being held in your judge’s assigned courtroom, but if it isn’t, DISCUS-B asks that you record that fact and then answer a question about why the event was scheduled in a different location. This question appears in the “Room Selection Information” section (pictured on the next page).

Room Selection Information	
*Is the Selected Room the Judge's Assigned Courtroom?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Judge does not have an assigned courtroom
*Reason(s) for Using this Room: (check all that apply)	<input type="checkbox"/> Assigned Courtroom Is Unavailable <input type="checkbox"/> Is Convenient for Trustee, Attorneys, or Parties <input type="checkbox"/> Is Handicap Accessible <input type="checkbox"/> Has Computer / Audio / Video Equipment <input type="checkbox"/> Has Larger Space (e.g., for multiple parties) <input type="checkbox"/> Has Special Security Features <input type="checkbox"/> Is Available / No Special Features Required <input type="checkbox"/> Preferred Non-Courtroom Space for this Event <input type="checkbox"/> Using Courtroom in Divisional Office or Other Location <input type="checkbox"/> Other
*Did the Need to Use the Selected Room Affect the Date or Time of the Scheduled Event?	<input type="radio"/> Yes <input type="radio"/> No

6. The “Room Selection Information” section also asks “Did the Need to Use the Selected Room Affect the Date or Time of the Scheduled Event?” If the answer is yes, two follow-up questions appear regarding the reasons for the selection and its effect.

*Did the Need to Use the Selected Room Affect the Date or Time of the Scheduled Event?	<input checked="" type="radio"/> Yes <input type="radio"/> No
*What Effect Did the Need to Use the Selected Room Have On the Scheduled Date or Time? (check all that apply)	<input type="checkbox"/> Chose a date a week or less different from the preferred date <input type="checkbox"/> Chose a date more than a week different from the preferred date <input type="checkbox"/> Chose a time an hour or less different from the preferred time <input type="checkbox"/> Chose a time more than an hour different from the preferred time
*What Were the Reasons for Choosing a Date or Time Other Than the Preferred Date or Time? (check all that apply)	<input type="checkbox"/> Could not schedule enough time on the preferred date <input type="checkbox"/> Could not schedule enough time at the preferred time <input type="checkbox"/> Could not schedule time for consecutive days <input type="checkbox"/> Other

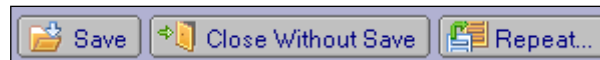
7. Once you’ve finished recording all the data, click on the “Save” button at the top of the screen. Note that DISCUS-B will not permit you to close a record until you’ve completed every field. DISCUS-B will display the message below if you recorded the event successfully.



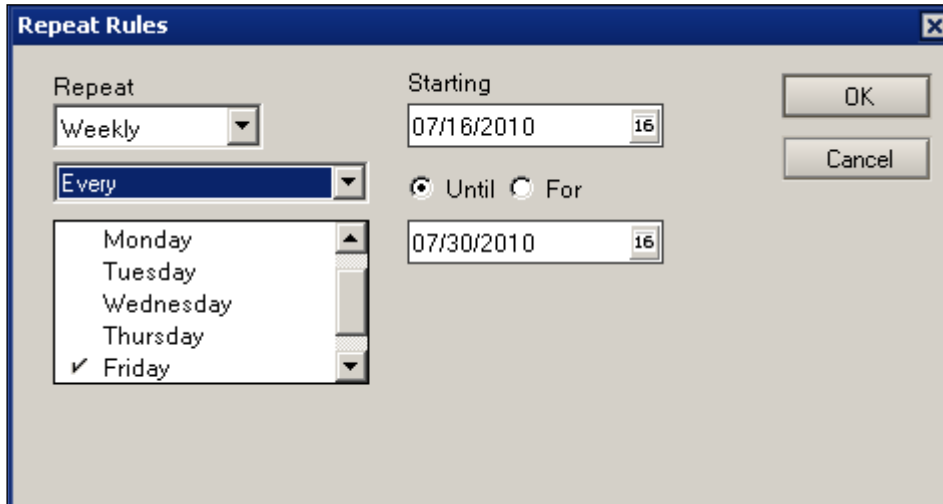
## Scheduling a Recurring Event

Many events, such as regularly scheduled motions days, occur repeatedly on a regular schedule. DISCUS-B permits you to schedule these types of proceedings through a single entry using the “Repeat” function.

1. Schedule the event as you would any other event using the instructions on the preceding pages.
2. Before saving your entry, click on the “Repeat” button at the top of the screen. It’s located near the “Save” button.



3. A pop-up window appears, asking for information on how the event repeats. Create the repeating event using the appropriate pull-down menus and click on “OK.” Remember that the Repeat function defaults to the present day of the week—that is, if it’s Tuesday, the Repeat function will default to Tuesday. Make sure to click on the appropriate day of the week for the event you’re scheduling.



4. Click on the “Save” button. The word “Repeat” will appear next to the event description to let you know it’s a recurring event.

## Modifying, Canceling, and Restoring Scheduled Events

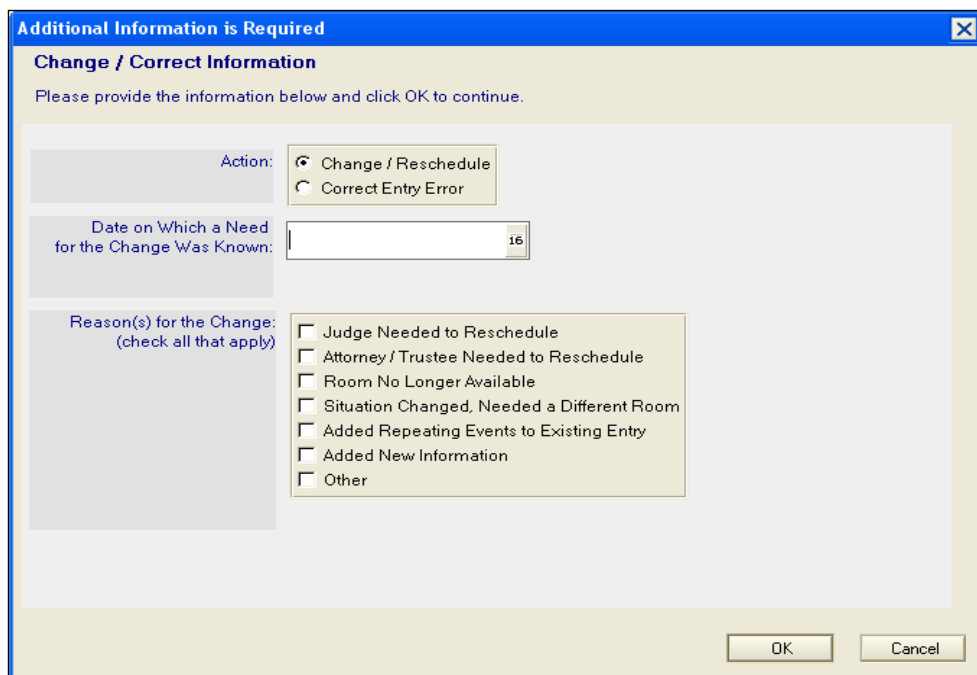
For any number of reasons, you may need to modify or cancel events you've already scheduled. You may also want to restore a previously cancelled event. Making such changes in DISCUS-B is a very straightforward process.

### Modifying a Scheduled Event

1. Find the scheduled event you want to modify and double-click on it to open it.
2. Click on the "Edit or Cancel Event" button at the top of the screen.



3. Make the change to the "General Information" section and any other sections as necessary.
4. Click on "Save Change/Correction."
5. Complete the "Change/Correct Information" pop-up window that appears. First, choose "Change/Reschedule" or "Correct Entry Error," as appropriate. Then record the date when the court learned about the change. Select all the reasons the event is being modified. Note that different "Reason(s) for the Change" appear depending on whether it is a change/rescheduling or an error correction.

A screenshot of a dialog box titled "Additional Information is Required". The dialog box has a blue header bar with a close button (X) in the top right corner. Below the header, the text "Change / Correct Information" is displayed. Underneath, it says "Please provide the information below and click OK to continue." The main area of the dialog box contains several fields:

- Action:** A radio button group with two options: "Change / Reschedule" (which is selected) and "Correct Entry Error".
- Date on Which a Need for the Change Was Known:** A text input field with a calendar icon on the right side, showing the number "16".
- Reason(s) for the Change: (check all that apply):** A list of seven checkboxes:
  - Judge Needed to Reschedule
  - Attorney / Trustee Needed to Reschedule
  - Room No Longer Available
  - Situation Changed, Needed a Different Room
  - Added Repeating Events to Existing Entry
  - Added New Information
  - Other

At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

6. Click on “OK.” If your event is one in a series of events, you have the option to make the change for all events. In that case, choose “All Instances” (rather than “Just This Instance”) and click on “OK.”
7. After saving an event, DISCUS-B returns you to the Scheduling Calendar View for the date and location you were viewing before editing the event. If you changed either the date or the location while editing the event in the Scheduling Detail View, you will have to navigate to that new date and/or location to see the saved event. If you’re rescheduling all instances of a multi-day event and your modification will span a weekend or holiday, check to make sure that the individual days of the event have been shifted as you intended. If any events have been shifted into weekends or holidays, you will need to manually reschedule them.

### Canceling a Scheduled Event

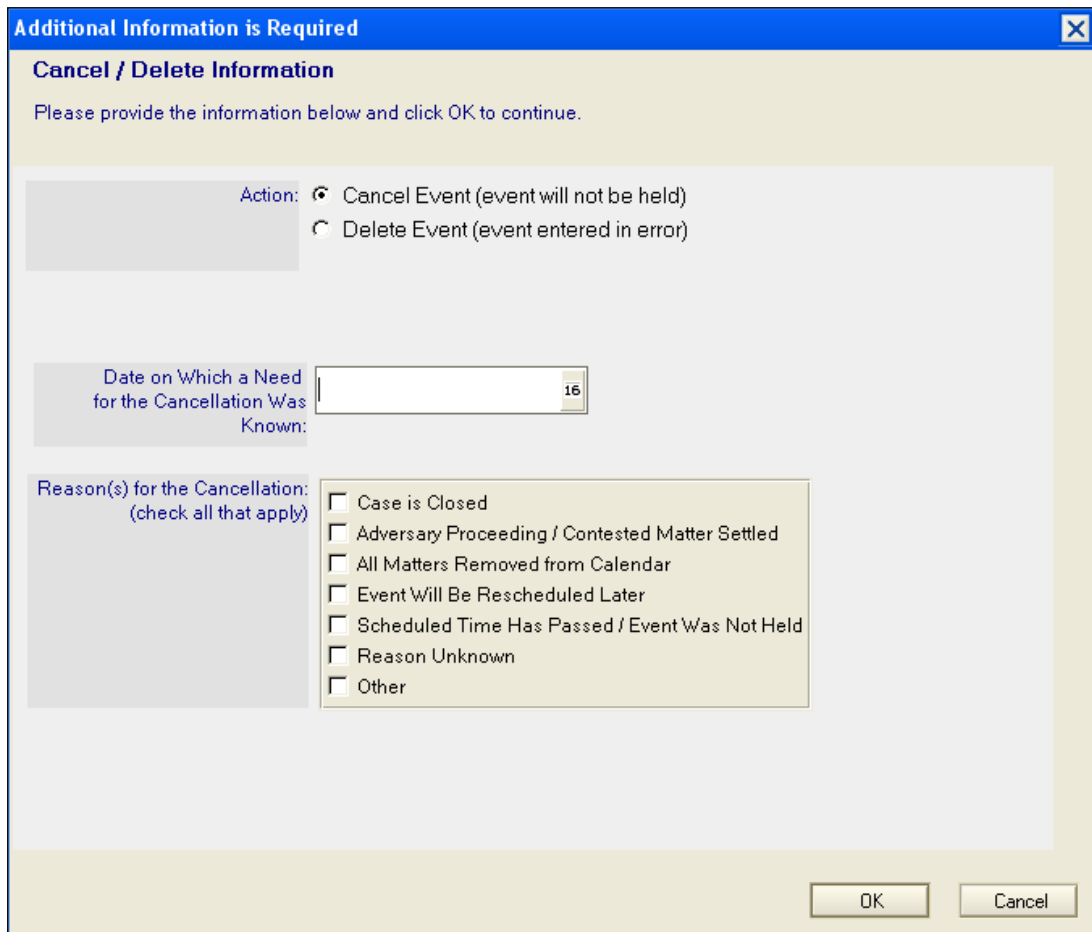
1. Find the scheduled event you want to cancel and double-click to open it.
2. Click on the “Edit or Cancel Event” button at the top of the screen.



3. Click on “Cancel/Delete Event” (next to “Save Change/Correction” near the top of the screen).



4. Complete the “Cancel/Delete Information” pop-up window that appears. First, choose “Cancel Event (event will not be held)”. Then record the date when the court learned about the cancellation. Select all the reasons for the cancellation.

A dialog box titled 'Additional Information is Required' with a close button (X) in the top right corner. The main title is 'Cancel / Delete Information'. Below the title is the instruction: 'Please provide the information below and click OK to continue.' The dialog contains three main sections: 1. 'Action:' with two radio buttons: 'Cancel Event (event will not be held)' (selected) and 'Delete Event (event entered in error)'. 2. 'Date on Which a Need for the Cancellation Was Known:' with a date picker showing '16'. 3. 'Reason(s) for the Cancellation: (check all that apply)' with a list of seven checkboxes: 'Case is Closed', 'Adversary Proceeding / Contested Matter Settled', 'All Matters Removed from Calendar', 'Event Will Be Rescheduled Later', 'Scheduled Time Has Passed / Event Was Not Held', 'Reason Unknown', and 'Other'. At the bottom right are 'OK' and 'Cancel' buttons.

5. Click on “OK.” The event has been cancelled.
6. If the event never should have been entered (i.e., it was entered in error), follow Steps 1–3, above. In the “Cancel/Delete Information” window, select “Delete Event.” Then record the date when the court learned about the need for deletion. Select the “Reason(s) for the Cancellation.” Click on “OK.” The event has been deleted. Note that deleted records cannot be retrieved.



## Restoring a Cancelled Scheduling Event

1. In the Calendar View, click on “Other Views” and then “Cancelled Events.”



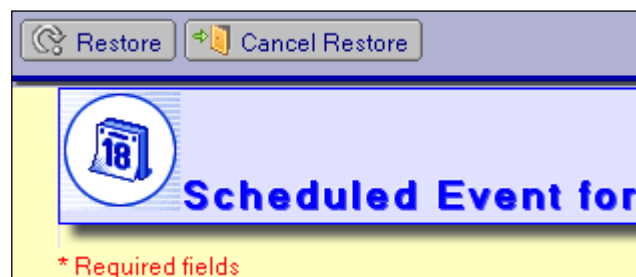
2. Choose the site and date on which the entry was originally scheduled (prior to cancellation). Find the correct event and highlight it by clicking on it.

Room	Date	Start	End	Judge / User	Event Category
▼ <b>Federal Building</b>					
▼ Courtroom B					
▼ 07/19/2010					
		06:00 PM	- 08:00 PM	Attorneys, Court Staff, Public	General Education, Training, or Outreach

3. Click on the “Restore” button at the top of the screen.



4. Once the event opens, change any information necessary.
5. Click on the “Restore” button near the top of the Detail View screen.



6. Complete the “Restore Information” pop-up window. Record the date when the court learned about the need to restore the event. Then, select all the reasons the event is being restored.

**Additional Information is Required**

**Restore Information**

Please provide the information below and click OK to continue.

Action:  Restore

Date on Which a Need for the Restore Was Known:

Reason(s) for the Restore: (check all that apply)

Event Rescheduled  
 Event Cancelled in Error  
 Other

OK Cancel

7. Click on “OK.”

## Scheduling Record History

For all scheduling events, you can see a record history, including who recorded the original entry and when, and all modifications to the original entry. In the Detail View of an event record, scroll to the bottom of the screen and click on “Record History” to see this complete record history. An example is shown below.

\*

<b>Record History</b>			
<b>Created By:</b>	Lori Murphy/Education/FJC	<b>Created Date:</b>	01/11/2007
<b>Last Modified By:</b>	Lori Murphy/Education/FJC	<b>Last Modified Date:</b>	01/18/2007
<b>Activity Log:</b>			
1> 1/11/2007 [Updated By Lori Murphy / known date: 1/2/2007] - Judge Needed to Reschedule - Attorney / Party Needed to Reschedule			
2> 1/11/2007 [Updated By Lori Murphy / known date: 1/2/2007] - Case is Settled			
3> 1/18/2007 [Updated By Lori Murphy / known date: 1/1/2007] - Event Cancelled In Error			

## Resolving Scheduled Events

If there is a scheduling record in DISCUS-B, there must be some resolution of the scheduled event—that is, it must be resolved through an actual use record, or it must be cancelled or rescheduled. We’ve already demonstrated how to cancel or reschedule a previously scheduled event. Those are both done in the Scheduling module. To resolve an event that actually happened, create an event in the Actual Use module. See the next section for specific instructions on linking the actual use record to the scheduling record.

Below is the “Unresolved Events” view in “Other Courtroom Views,” which allows you to see which scheduled events have not been resolved. This view is refreshed in real time. If you’ve resolved the scheduled event (e.g., rescheduled it, canceled it, or created an actual use event and linked it), the event will disappear from the “Unresolved Events” view immediately.

Room	Date	Start	End	Event Information
▼ <b>Bankruptcy Courthouse</b>				
▼ Courtroom 1				
	▼ 01/12/2010	08:00 AM	- 06:00 PM	Jan Smith [10 hours (Repeat)] – judge at FJC conference - Event Category: Special Circumstances: Room Cannot be Used or Judge Away - Event Type: Judge on Official Business Elsewhere for 6+ Hours
	▼ 01/11/2010	08:00 AM	- 06:00 PM	Jan Smith [10 hours (Repeat)] – judge at FJC conference - Event Category: Special Circumstances: Room Cannot be Used or Judge Away - Event Type: Judge on Official Business Elsewhere for 6+ Hours
	▼ 12/02/2009	02:30 PM	- 03:00 PM	Jan Smith [30 mins] – Ch 11 hearing - Event Category: Matters Convened by a Judge - Event Type: Hearings / Trials

## DISCUS-B: Actual Use

### About the Actual Use Module

The Actual Use module is the place in DISCUS-B where you must record all events that take place in courtrooms and certain other events scheduled for places outside the courtroom. What events should you record that occur outside the courtroom? There are two types. The first is any matter convened by a judge. These matters include settlement conferences, status conferences, and any other event involving a case and the parties, no matter where these events occur (e.g., in chambers, in a state courthouse). The second is any ceremony, such as a naturalization ceremony or a swearing in of new attorneys, conducted in some place other than the courtroom.

Actual use data record things that have already happened. You will record actual use data in DISCUS-B when you learn that an activity or event *has taken place*.

### Creating Actual Use Records in DISCUS-B

The Actual Use module includes a Calendar View and a Detail View. The Calendar View is the place to start entering actual use information, since this is where you select the place and date events were held. You will then proceed to the Detail View, where you can record more specific information about the event. Each of the views is described on the following pages.

### The Actual Use Calendar View

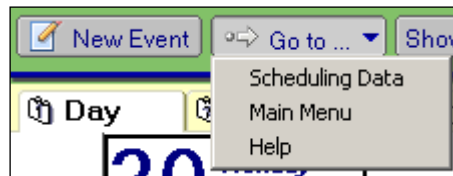
To access the Actual Use module, go to the DISCUS-B main menu and click on the “Enter Actual Use Data” button. Or, if you already have the Scheduling module open, use the “Go to” button and click on “Actual Use Data.”

The module will open to the Calendar View. The example below shows the day view for October 20, 2009, in the Federal Building’s Courtroom A.

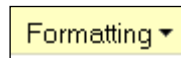
The screenshot displays the 'Actual Use Data' interface for 'Courtroom A'. The top navigation bar includes 'New Event', 'Go to', and 'Show Scheduled Events'. The main area shows a calendar for October 2009, with the 20th selected. Below the calendar is a list of locations: Bankruptcy Courthouse, Federal Building (with sub-items Courtroom A, Courtroom B, Chambers, Public Conference Room, and Other Room), Other Site, and Training & Practice Courthouse. The right side of the screen shows a time slot grid from 5 am to 2 pm, with a 'Formatting' dropdown menu.

There are several features to note about the Calendar View:

1. The name of the module appears in the upper left corner of the screen—in this case, “Actual Use Data.” Always check to be sure you are recording data in the correct module. In addition to the name, notice the color. The Actual Use module is highlighted in green; the Scheduling module is highlighted in blue.
2. A courtroom name appears on the left and also at the top of the screen. This is your default courtroom—that is, the one your court liaison identified as the room for which you would most often be entering data. Most likely, it is your judge’s assigned courtroom. When you first open the Actual Use module, DISCUS-B will present the Calendar View for your default courtroom.
3. On the left below the monthly calendar are listed the courtrooms and other locations where events might take place in your district. Notice that the rooms in your version of DISCUS-B have been customized for your district.
4. The Calendar View defaults to today’s date.
5. At the top is a button for “New Event,” which you will click on when you want to record an event that has happened.
6. Also at the top is the “Go to” button, which is used to open, in a separate window, the Scheduling module, the Main Menu, or the Help screen.



7. The “Formatting” button on the upper right allows you to choose the “Summarize” option, which gives you a detailed view of events you’ve recorded.



8. The “Other Views” link on the lower left allows you to see the data in different ways—specifically, by data recorder, room, date, judge/other user, or link status.



## The Actual Use Detail View

This is the view where you record information on an event *that has been held* and also where, if the event was previously recorded, you can edit or delete it. All fields are required, and you can't save a record until you have completed each field.

The principal features to note in the Detail View are as follows:

1. The "General Information" section of this view identifies the site, room, and date the event occurred. These items are carried over from the Calendar View, but you can change them by using the pull-down menus in this section. The only data you have to record in this section are the start and end times, which you can enter either manually or by clicking on the respective clocks.

General Information	
*Site Name:	Federal Building
*Room Name:	Courtroom B
*Date:	07/19/2010 16 Copy Scheduled Event Information
*Actual Start Time - End Time:	<input type="text"/> to <input type="text"/>

2. If there is at least one previously scheduled event (in the Scheduling module) on the date and in the room you've selected, a "Copy Scheduled Event Information" button will appear in the "General Information" section. Click on this button to see a list of events scheduled for that date and location. Highlight the event you want (i.e., the one you want to create an actual use record for) by clicking on it and then click on "OK." This will pull all scheduling data over from the Scheduling module. Note that you can create an actual use record without a corresponding scheduling event, since not all events that occur are scheduled in advance (e.g., an emergency hearing, an impromptu meeting between attorneys).

Select Event					
Highlight desired event. Press OK to copy information.					
Start Time	End Time	Judge / User	Subject	Event Type	Event Category
06:00 PM	08:00 PM	Attorneys, Court Staff, Public	Debtor education class	Debtor Education	General Education, Training, or Outreach

- If you've successfully copied the scheduling information, the word "Linked" will appear in the upper right-hand corner of the Detail View. A parenthetical will also indicate how many scheduling records have been linked to this actual use record (e.g., "1 event," "2 events").

**Linked (1 event)**

- On the Detail View screen, the "Event Information" section asks you to identify the "Event Category" and "Event Type" for the event you're scheduling. If you copied the information from a scheduled event, this will already be filled in.

Event Information	
*Event Category:	<input type="radio"/> Matters Convened by a Judge <input type="radio"/> Other Case-Related Activity <input type="radio"/> Bankruptcy Court Ceremony <input checked="" type="radio"/> General Education, Training, or Outreach <input type="radio"/> Maintenance (during normal court hours) <input type="radio"/> Special Circumstances: Room Cannot be Used or Judge Away <input type="radio"/> Other Use
*Event Type:	<input checked="" type="radio"/> Debtor Education <input type="radio"/> Attorney / Trustee Education and Training <input type="radio"/> Staff Education and Training <input type="radio"/> Public Education and Outreach <input type="radio"/> Other Education, Training, or Outreach

- The "Event Description" section asks for a brief description of the event, such as "status hearings" or "debtor education." It is a free text field.

*Event Description:	<input type="text" value=""/>
	<i>(brief)</i>

- The name of the judge is carried over as a default. You can change it by using the pull-down menu or entering the correct name manually.

*Judge Convening the Proceeding:	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Smith, Jan</div> <div style="padding: 2px;">Johnson, William</div> <div style="padding: 2px;">Jones, Robert</div> <div style="background-color: #000080; color: white; padding: 2px;">Smith, Jan</div> <div style="padding: 2px;">Visiting Judge</div> <div style="padding: 2px;">Other Judge</div> </div>
<b>m Selection Informa</b>	

7. If you selected “Matters Convened by a Judge” in the “Event Category” field, a question will appear: “Is This a Continuation of a Previous Actual Use Event?” Choose “Yes” only if this actual use event is connected to another actual use event. And when asked to identify which event it’s connected to, enter the immediately preceding date on which the event was held. For example, if it’s the end of the day on Wednesday and you’re recording time for a multi-day trial that began Monday morning, you’ll answer yes (because the event is a continuation of a previous actual use event), and when asked for the date of the previous event, you’ll give Tuesday’s date, which is the immediately preceding date.

<p>*Is This a Continuation of a Previous Actual Use Event?</p>	<p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>
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8. DISCUS-B assumes the event is being held in your judge’s assigned courtroom, but if it isn’t, DISCUS-B asks that you record that fact and then answer the question about why the event was scheduled in a different location. This question is found in the section “Room Selection Information.”

Room Selection Information	
<p>*Is the Selected Room the Judge’s Assigned Courtroom?</p>	<p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p> <p><input type="radio"/> Judge does not have an assigned courtroom</p>
<p>*Reason(s) for Using this Room: <i>(check all that apply)</i></p>	<p><input type="checkbox"/> Assigned Courtroom Is Unavailable</p> <p><input type="checkbox"/> Is Convenient for Trustee, Attorneys, or Parties</p> <p><input type="checkbox"/> Is Handicap Accessible</p> <p><input type="checkbox"/> Has Computer / Audio / Video Equipment</p> <p><input type="checkbox"/> Has Larger Space (e.g., for multiple parties)</p> <p><input type="checkbox"/> Has Special Security Features</p> <p><input type="checkbox"/> Is Available / No Special Features Required</p> <p><input type="checkbox"/> Preferred Non-Courtroom Space for this Event</p> <p><input type="checkbox"/> Using Courtroom in Divisional Office or Other Location</p> <p><input type="checkbox"/> Other</p>
<p>*Did the Need to Use the Selected Room Affect the Date or Time of the Scheduled Event?</p>	<p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>

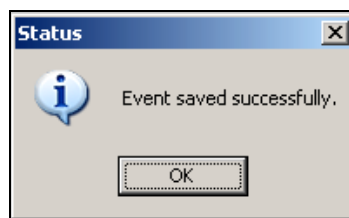
9. The last section in the Detail View is “Related Activity Information.” This section of DISCUS-B, which is shown on the next page, is intended to provide a time-saving way for you to capture the time spent by others in the courtroom either before or after the main event (i.e., before or after the hearing, ceremony, etc.) that was held in the courtroom. Always record the main event first, and then include the related activities.



Remember that for purposes of the study, “court staff” include courtroom deputies, judicial assistants, court security officers, court reporters, interpreters, and IT staff. You do not need to record the time for each individual who is in the courtroom. We want you to capture only the time of the earliest arrival and the final departure for each category of persons in the room.

Related Activity Information					
<p>Judge Present and Presiding <b>During</b> Proceeding or Event:</p> <p>Between 06:13 PM - 07:58 PM</p> <p><input type="button" value="Add Activity"/></p>	<table border="1"> <thead> <tr> <th>Time</th> <th>User</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Time	User		
Time	User				
<p>Set-Up or Preparation <b>Before</b> Proceeding or Event:</p> <p>Before 06:13 PM</p> <p><input type="button" value="Add Activity"/></p>	<table border="1"> <thead> <tr> <th>Time</th> <th>User</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Time	User		
Time	User				
<p>Take-Down or Wrap-Up <b>After</b> Proceeding or Event:</p> <p>After 07:58 PM</p> <p><input type="button" value="Add Activity"/></p>	<table border="1"> <thead> <tr> <th>Time</th> <th>User</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Time	User		
Time	User				

- Once you’ve finished recording all the data, click on the “Save” button at the top of the screen. Note that DISCUS-B will not permit you to close a record until you’ve completed each field. DISCUS-B will display the message below if you recorded the event successfully.



## Modifying or Deleting Actual Use Events

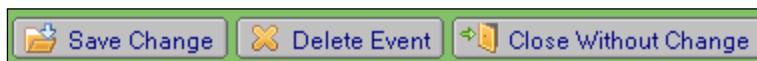
For any number of reasons, you may need to modify or delete actual use events. Making such changes in DISCUS-B is a very straightforward process.

## Modifying an Actual Use Event

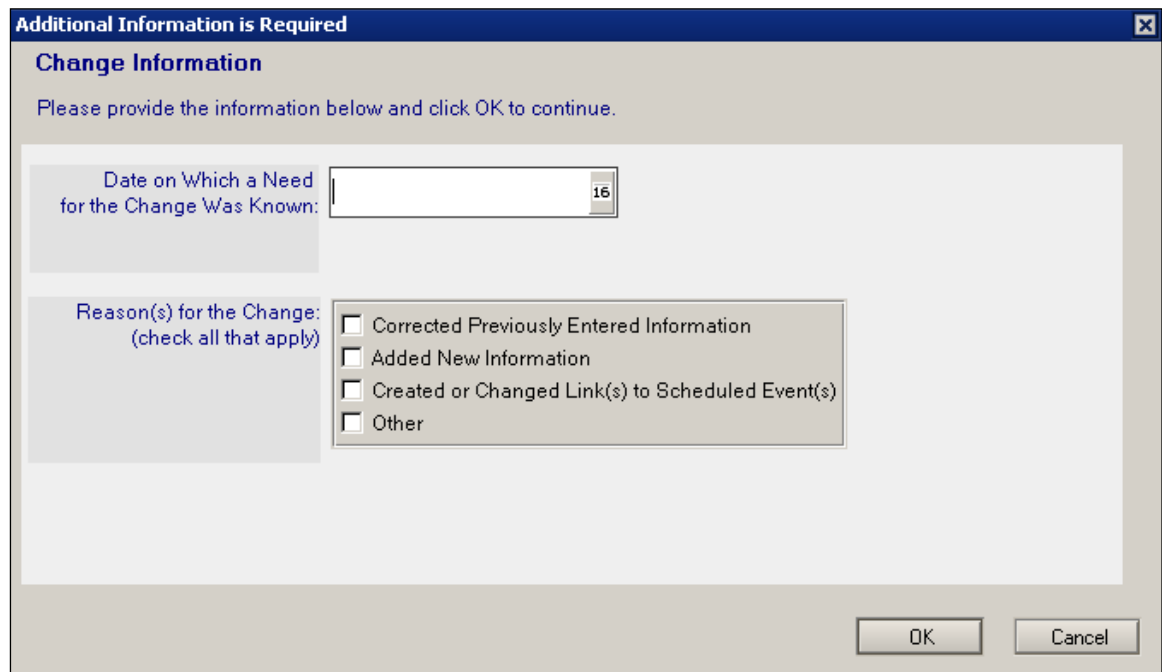
1. Find the actual use event you want to modify and double-click on it to open it.
2. Click on the “Edit or Delete Event” button at the top of the screen.



3. Make the change to the “General Information” section and any other sections as necessary.
4. Click on “Save Change.”



5. Complete the “Additional Information is Required” pop-up box that will appear. Record the date when the court learned about the change and select all the reasons the event is being modified.

A screenshot of a dialog box titled 'Additional Information is Required'. The dialog has a blue header bar with a close button (X) in the top right corner. Below the title is the section 'Change Information' with the instruction 'Please provide the information below and click OK to continue.' The main area contains two input fields. The first is labeled 'Date on Which a Need for the Change Was Known:' and has a date picker showing '16'. The second is labeled 'Reason(s) for the Change: (check all that apply)' and contains four checkboxes: 'Corrected Previously Entered Information', 'Added New Information', 'Created or Changed Link(s) to Scheduled Event(s)', and 'Other'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

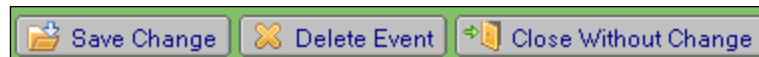
6. Click on “OK.”
7. After saving an event, DISCUS-B returns you to the Actual Use Calendar View for the date and location you were viewing before editing the event. If you changed either the date or the location while editing the event in the Actual Use Detail View, you will have to navigate to that new date or location to see the saved event.

## Deleting an Actual Use Event

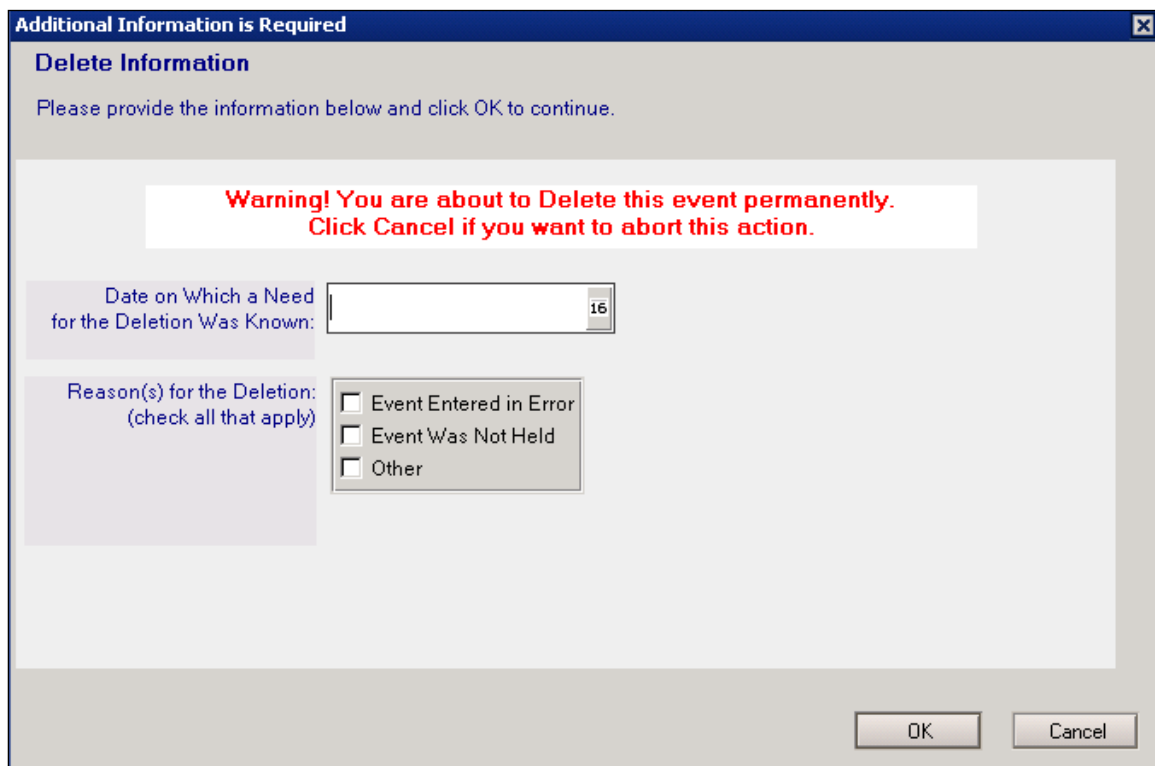
1. Find the scheduled event you want to delete and double-click to open it.
2. Click on the “Edit or Delete Event” button at the top of the screen.



3. Click on “Delete Event.”



4. Complete the “Additional Information is Required” pop-up box that will appear. Record the date when the court learned about the need to delete the record, and select all the reasons for the deletion.

A screenshot of a dialog box titled 'Additional Information is Required'. The dialog box has a blue header bar with a close button (X) in the top right corner. Below the header, the text 'Delete Information' is displayed in bold. Underneath, it says 'Please provide the information below and click OK to continue.' A prominent red warning message is centered: 'Warning! You are about to Delete this event permanently. Click Cancel if you want to abort this action.' Below the warning, there is a text input field labeled 'Date on Which a Need for the Deletion Was Known:' with a calendar icon on the right showing the date '16'. Underneath that, there is a section labeled 'Reason(s) for the Deletion: (check all that apply)' containing three checkboxes: 'Event Entered in Error', 'Event Was Not Held', and 'Other'. At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

5. Click on “OK.” The event will be deleted. The Actual Use module does not have a “Restore” option. Once an event has been deleted, it cannot be restored. If you’ve deleted the event in error, simply create a new scheduling record for the event. Don’t forget to link it to the scheduling record (if there is one).

## Actual Use Record History

For all actual use events, you can see a record history, including who recorded the original entry and when, as well as all modifications to the original entry. In the Detail View, scroll to the bottom of the screen and click on “Record History” to see this complete record history.

<b>Record History</b>						
Created By:	Carol Krafka/Research/FJC			Created Date:	02/25/2010	
Last Modified By:	Carol Krafka/Research/FJC			Last Modified Date:	02/25/2010	
<b>Activity Log:</b>						
1 > 2/25/2010 [Updated By Carol Krafka / known date: 2/25/2010] - Corrected Previously Entered Information						
2 > 2/25/2010 [Updated By Carol Krafka / known date: 2/25/2010] - Corrected Previously Entered Information						
<b>Anomalies Approve Log:</b>						
Date			ID	Updated On	Judge / User	
02/25/2010	10:15 AM	- 11:30 AM	A000310-022510153108_00:02	02/25/2010	Trustee	
02/25/2010	10:15 AM	- 11:30 AM	A000310-022510153108_00:03	02/25/2010	Trustee	
02/25/2010	10:17 AM	- 11:30 AM	A000310-022510153108_00:01	02/25/2010	Trustee	

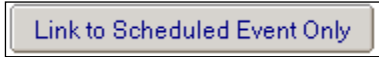
## Linking Actual Use Events to Scheduled Events

The “Link Status” option under “Other Courtroom Views” is used to see whether actual use records have been linked to corresponding scheduling records. If there is a scheduling record in DISCUS-B, there must be some resolution of the scheduled event—that is, it must be resolved through an actual use record, or it must be cancelled or rescheduled. If an actual use record is linked to a scheduling record, a handshake icon will appear, as shown below.

<b>Bankruptcy Courthouse</b>			
Courtroom 1			
03/08/2010			
	06:04 PM	- 06:56 PM	Attorneys, Public [52 mins] – debtor education class - Event Category: General Education, Training, or Outreach - Event Type: Debtor Education
03/04/2010			
	09:43 AM	- 11:10 AM	Jan Smith [1 hr 27 mins] – confirmations, motions - Event Category: Matters Convened by a Judge - Event Type: Hearings / Trials

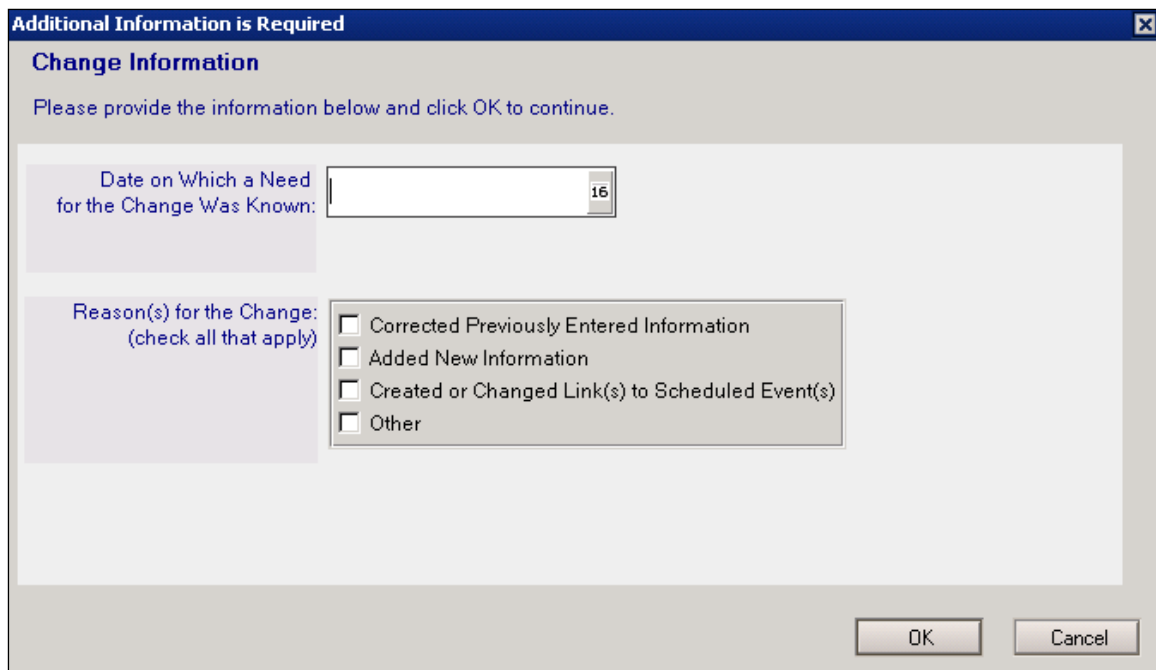
If an event in this view does not have a handshake icon, but you know it should be linked to a previously scheduled event, you can link it after the fact. In the “Link Status” view, double-click on the actual use event you want to link. On the “Detail View” screen, click

on the “Edit or Delete Event” button. Click on the button in the “General Information Section” that says “Link to Scheduled Event Only.”



Select the event you want to link to and click on “OK.” The phrase “Linked (1 event)” will appear in red at the top right of the screen. Click on “Save Change.”

Complete the “Additional Information is Required” pop-up box that will appear. Record the date when you learned about the need to link the record, and under “Reason(s) for the Change,” select “Created or Changed Link(s) to Scheduled Event(s).”



**Additional Information is Required**

**Change Information**

Please provide the information below and click OK to continue.

Date on Which a Need for the Change Was Known:

Reason(s) for the Change: (check all that apply)

- Corrected Previously Entered Information
- Added New Information
- Created or Changed Link(s) to Scheduled Event(s)
- Other

OK Cancel

When you go back to the “Link Status” view, you will immediately see the handshake icon for the event you just linked.