

# **CM/ECF Version 3.1**

## ***New Features for Attorney Users***



United States District Court, Southern District of California

April 2008

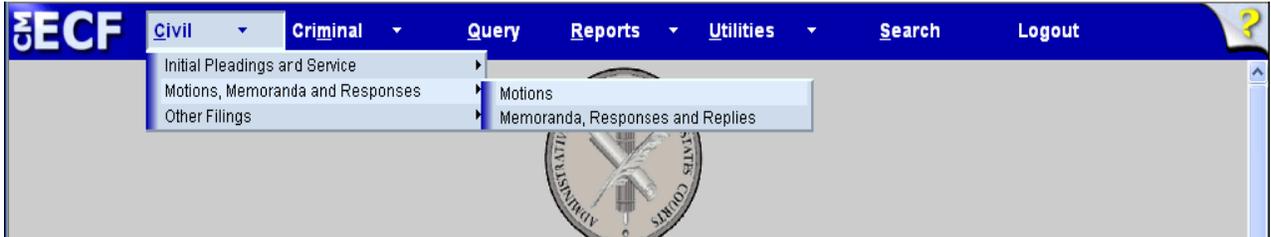
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## 1. CASCADING MENUS

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You have the option of using the new cascading menus or continuing to use the existing static menus



Notice the Civil, Criminal, Reports, and Utilities selections have a down arrow next to them, which indicates the presence of a sub-menu. Placing the mouse pointer over a primary sub-menu option displays the events on that menu.

To use the keyboard to display a sub-menu, press and hold the key together with the underlined letter in the menu name (Alt + C)

A sub-menu may have its own sub-menu, as indicated by the arrow to the right of the menu name.

## 2. SEARCH MENUS AND EVENTS

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A search option has been added to the Main Menu. Clicking on Search displays the Search Menus and Events window.

In this window enter all or part of the name of the event to be found. For example, to find an Objection to Report and Recommendation event, type "objection" in the box and click on the Search button.

CM/ECF will display a list of events which contain the word or string of words and the menu on which the event can be found.

## Search results for 'objection'

10 events found

### Search Menus and Events

#### Civil Events → Notices

[Objection](#)

[Notice of Objection to Electronic Filing](#)

#### Civil Events → Other Answers

[Objection to Report and Recommendations](#)

#### Civil Events → Other Documents

[Objections to Answer to Writ](#)

#### Civil Events → Responses and Replies

[Objection to Bill of Costs](#)

[Objection to Report and Recommendation](#)

#### Criminal Events → Notices

[Objection](#)

[Notice of Objection to Electronic Filing](#)

To e-file the document, simply click on the appropriate event.

### 3. DOCKET EVENT SEARCH WITHIN A CATEGORY

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After selecting an event category, CM/ECF will display will display a list of events within the category and an event search box. This is an example of the Motions category.

The screenshot shows the CM/ECF interface for the 'Motions' category. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', and 'Utilities' dropdown menus. Below this, the 'Motions' title is displayed. A search box contains the placeholder text 'Start typing to find an event.' Below the search box, there are two columns: 'Available Events (click to select events)' and 'Selected Events (click to remove events)'. The 'Available Events' list includes: '1 - Exparte Docket Entry AND Document-use ONLY with other si', '1 - Exparte Document-use ONLY with other selection', 'Alter Judgment', 'Amend/Correct', 'Appeal In Forma Pauperis', 'Appear', 'Appoint Counsel', 'Appoint Custodian', 'Appoint Expert', 'Appoint Guardian/Attorney ad Litem', 'Appoint Receiver', 'Approve Consent Judgment', 'Attorney Fees', 'Bifurcate', and 'Bond'. At the bottom of the interface, there are 'Next' and 'Clear' buttons.

To find an event within the category, either scroll down the list, or in the search box type all or part of a word from the name of the event.

For example, to locate the dismiss event, type “dism” in the search box. CM/ECF will display a list of events which have a word starting with the letters entered. Click on the desired event to select it from the list.

NOTE: The search will begin with the first letter typed; therefore, the search function does not accommodate the use of wildcard characters.

The selected event will be added to the Selected Events box, and the list of available events will again be displayed.

Continue with event selection until all necessary events have been added to the Selected Events Box. If an incorrect event is selected, click on the event to removed it from the list.

Once all of the necessary events have been selected, click the NEXT button to continue.

#### 4. SEARCHING FOR A CASE NUMBER

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The Case Number look-up screen has been modified to reduce the number of screens you must navigate to find a full case number.

After a partial case number is entered, the screen shown will automatically display. Click on the Find This Case button to begin the case number look-up process.

When only a portion of a case number is entered, all possible number matches will display on the same screen as the initial look-up field.

Criminal cases will display the master case and each defendant in the case if the Franklin et al  minus symbol is displayed.  
If the plus sign is displayed all cases with the selected number will display

Select a case:

- 3:08-cr-31201-H USA v. Franklin et al
- 3:08-cv-31201-BTM-WMC Mason v. Campbell

08-31201

Select a case:

- 3:08-cr-31201-H USA v. Franklin et al 
  - 3:08-cr-31201-H-1 Carol Franklin
  - 3:08-cr-31201-H-2 Thomas Kelley
  - 3:08-cr-31201-H-3 Karen Tracy (closed)
  - 3:08-cr-31201-H-4 John Denton

Select a case number in the checkbox, or a defendant number in a criminal case, and activate the Next button.

## 5. NOTICE OF ELECTRONIC FILING (NEF) 'FREE LOOK'

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Beginning with Release 3.1, only case participants will receive one free look at documents that are accessed via the Notice of Electronic Filing (NEF) and the Daily Summary Report. The "One free look" per document in the NEF applies to only one email account per attorney per case. Below is the specific text added to the NEF.

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\*** Judicial Conference of the United States policy permits attorneys of record and parties in a case (including pro se litigants) to receive one free electronic copy of all documents filed electronically, if receipt is required by law or directed by the filer. PACER access fees apply to all other users. To avoid later charges, download a copy of each document during this first viewing.

Cases which are added to the attorney account, (added as an Additional Case in Edit) do not have a 'free look' when viewing the documents.

## 6. DOCKET REPORT

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### a. Viewing and/or Downloading All Documents for a Single Entry

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#### Options to View multiple documents

#### Options to view documents in HTML or PDF Format

**Docket Sheet**  
Case number   
 Filed  to   
 Entered  
Documents  to   
**Include:**  
 Parties and counsel  
 Terminated parties  
 List of member cases  
 Links to Notices of Electronic Filing  
**Document options:**  
 Include headers when displaying PDF documents  
 View multiple documents  
**Format:**  
 HTML (unpaginated)  
 PDF (paginated)  
**Sort by**    
   Make these options my default.

You now have the option of running the Docket Report in HTML format (unpaginated) or PDF format (paginated). If the report is run in PDF format, headers can be added to the report output.

Additional improvements allow you to easily view and print documents and docket sheets. You can view, print, or download all of the documents for multiple docket entries.

Additionally, users may now view, print or download the document and all attachments for a single docket entry.

Document Selection Menu

**Multiple Documents**

Select the document you wish to view.

Part	Description	
<a href="#">1</a>	Main Document	1 page
<a href="#">2</a>	Exhibit 1	1 page

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or  2 pages

If you click **View All**, a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. If you click **View Document**, the main document and all the PDF attachments for the docket entry are combined into a single PDF and displayed on the screen. You may print the documents from the screen.

**ECF**    [Query](#)    [Reports](#)    [Utilities](#)    [Logout](#)

To accept charges shown below, click on 'View Document', otherwise click the 'Back' button on your browser.

**Total Billable Pages: 13**  
**Total Cost: 1.04**

Pacer Service Center			
Transaction Receipt			
Fri Apr 6 11:09:21 EDT 2007			
Pacer Login:	[REDACTED]	Client Code:	
Description:	Image 3-0	Case Number:	7:07-cv-01045-EOE
Billable Pages:	1	Cost:	0.08

Pacer Service Center			
Transaction Receipt			
Fri Apr 6 11:09:21 EDT 2007			
Pacer Login:	[REDACTED]	Client Code:	
Description:	Image 3-1	Case Number:	7:07-cv-01045-EOE
Billable Pages:	4	Cost:	0.32

If you click **Download All** (on the screen shown above), a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. If you click **Download Documents**, the main document and all of the PDF attachments for the docket entry are combined in a ZIP file and a dialogue box is displayed for you to select a destination directory for the ZIP file (the screen is similar to the one below). Once you select a destination directory and filename, the ZIP file is saved in the specified location. The ZIP file is stored in a format that results in separate component files upon decompression.

**b. Viewing and/or Downloading All Documents for Multiple Docket Entries**

You can now select multiple documents from a docket sheet to view or download at the same time. If you view the documents, they will be combined into a single PDF. Downloading the documents puts them (and all attachments) into a ZIP file you can save.

Select the *View multiple documents* checkbox and click [Run Report].

**Docket Sheet**

Case number

Filed  to

Entered  to

Documents  to

**Include:**

- Parties and counsel
- Terminated parties
- List of member cases
- Links to Notices of Electronic Filing

**Document options:**

- Include headers when displaying PDF documents
- View multiple documents

Sort by

Make these options my default.

The docket sheet will appear with checkboxes next to the docket entries.

Date Filed	#	Select all / clear	Docket Text
01/03/2006	<a href="#">1</a>	<input type="checkbox"/>	COMPLAINT against Kite Industries ; jury demand filed by George Jones (SMS, ) (Entered: 01/03/2006)
01/03/2006	<a href="#">2</a>	<input type="checkbox"/>	ORDER transferring case to Jacksonville. New Case Number is 3:05-cv-1309-J-25MMH. Signed by Judge G. Kendall Sharp on 1/3/2006. (SMS, ) (Entered: 01/03/2006)
03/28/2006	<a href="#">3</a>	<input type="checkbox"/>	ORDER directing administrative closure Signed by Judge G. Kendall Sharp on 3/28/2006. (kma) (Entered: 03/28/2006)
05/30/2007	<a href="#">4</a>	<input type="checkbox"/>	NOTICE testing link in pdf by George Jones re <a href="#">1</a> Complaint (DR) (Entered: 05/30/2007)

or

c. To View

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Click [View Selected]. The documents will open as a single PDF.

d. To Download

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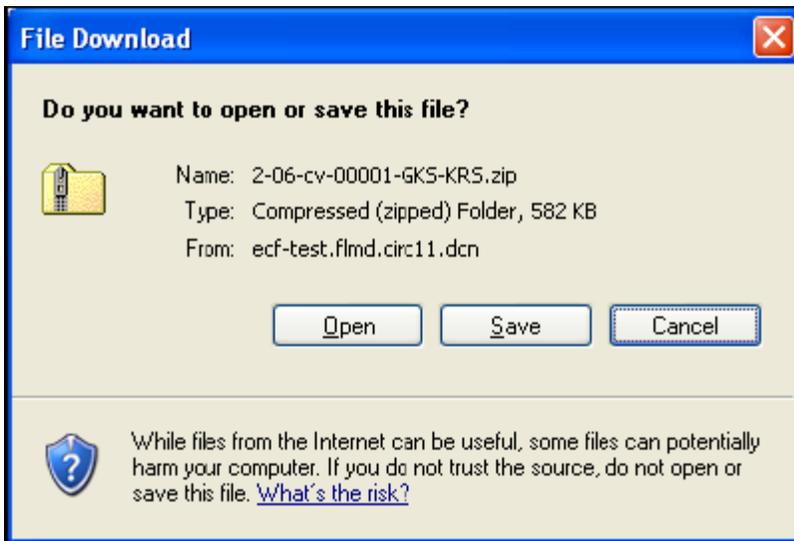
Click [Download Selected]. Depending on your browser settings you may get a message that the site was blocked from downloading the files to your computer.



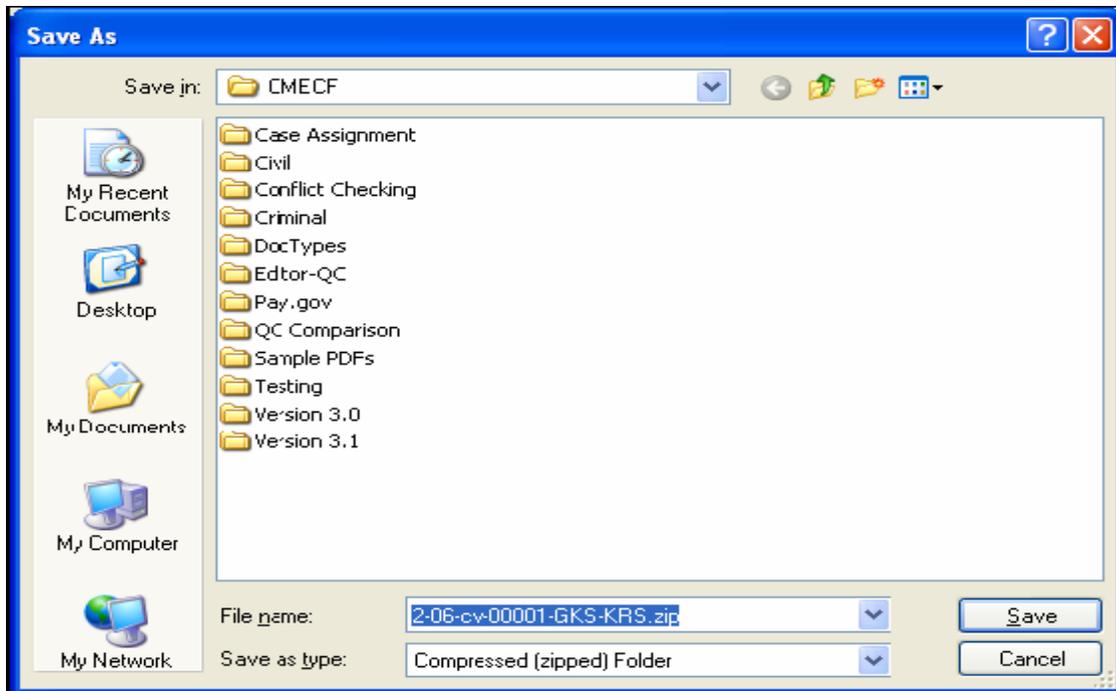
If you get this message, click in the yellow area and select *Download File...*



On the File Download dialog box, click [Save].



Find a location to save the file, and if you want, rename it. Click [Save].



## 7. PACER BILLING SCENARIOS FOR ATTORNEYS

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When a PACER user accesses a document for the first time via the Notice of Electronic Filing, he/she will not incur fees for accessing the newly filed document, but access to any hyperlinked document from within the original document **will incur a fee.**

When a PACER user accesses a document after the first look, or accesses it from a docket sheet, he/she will be charged for the original document and any documents displayed when using a hyperlink.

If documents filed in the same transaction contain hyperlinks to each other, the free look will be available from the document number hyperlink displayed on the NEF document submenu, not from the hyperlinks in the documents themselves. The following note was added to the document submenu screen: **“To view the main document and its attachments without incurring a PACER fee, click on the hyperlinks displayed on this menu. You will incur a PACER fee to view CM/ECF documents from hyperlinks within the documents.”**

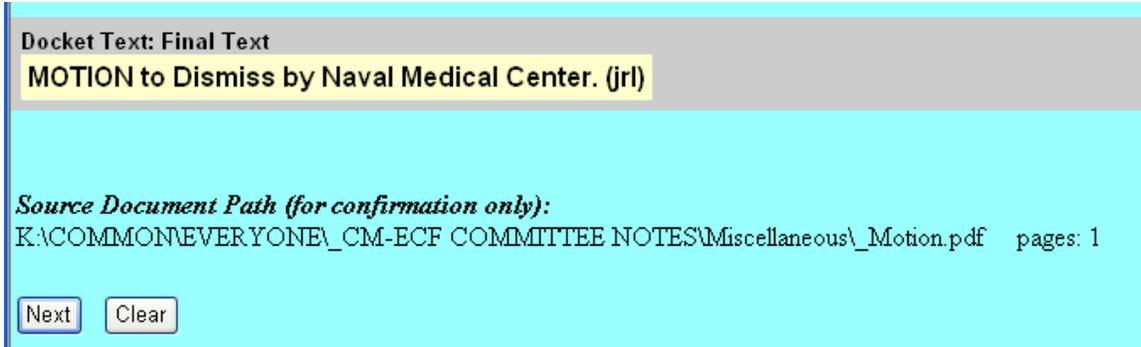
## 8. E-FILING

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### a. Displaying Document Paths

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The full path and filename for any uploaded documents will be displayed on the Final Docket Text screen during docketing. This allows you to confirm that the proper documents have been uploaded for the docket entry.



Docket Text: Final Text  
MOTION to Dismiss by Naval Medical Center. (jrl)

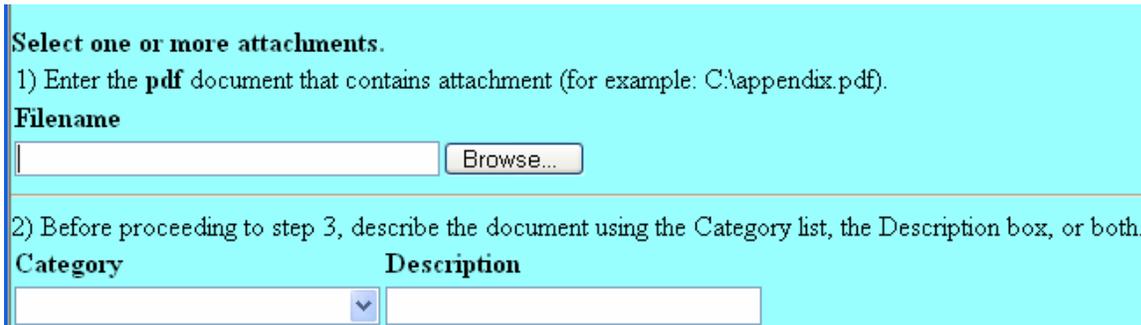
*Source Document Path (for confirmation only):*  
K:\COMMON\EVERYONE\CM-ECF COMMITTEE NOTES\Miscellaneous\Motion.pdf pages: 1

Next Clear

### b. Requiring a Description when Filing Attachments

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When adding an attachment to a document via docketing, you **must** either select an attachment category or enter a description or both, before continuing.



Select one or more attachments.

1) Enter the **pdf** document that contains attachment (for example: C:\appendix.pdf).

**Filename**

Browse...

2) Before proceeding to step 3, describe the document using the Category list, the Description box, or both.

Category	Description
<input type="text"/>	<input type="text"/>