

Slide 1 - Welcome

*Introduction to CM/ECF*

CM/ECF Attorney Series ELMs  
Version: 1.0  
Created for: U.S. Court of Appeals for the Eighth Circuit  
Created by: AO-0IT-SDSD

**Welcome to  
the Introduction  
to CM/ECF  
Electronic Learning Module**

AO SDSD  
TRAINING BRANCH

Animation

**Slide notes**

Welcome to the Introduction to CM/ECF Electronic Learning Module.

This lesson is designed to give you a basic introduction to the U.S. Courts' Case Management/Electronic Case Files application.

## Slide 2 - Navigation

In order to closely simulate the CM/ECF application, each screen in this lesson will contain instructions for you to follow that mimic the actual software. Follow those instructions to progress through the lesson.


You may also use the playback controls at the bottom of each screen. You may move forward or back and you may rewind to the beginning of the lesson. You can also drag the progress indicator bar forward or back through the lesson. The playback controls include a pause/play button. If you pause the lesson, click the button again to resume.

There is also a menu on each page in the upper left corner. If you move your mouse over the word **MENU**, a menu will drop down. You can click on the desired topic to jump to that part of the lesson.

These CM/ECF lesson modules also have a Closed Captioning feature. Click the CC button in the playback controls to toggle closed captioning on or off. You may also click the speaker icon to toggle the audio on or off.

To exit the lesson, click the X in the upper right corner of the lesson window, or select **Exit the Lesson** from the menu.

Click the **Start** button when you're ready.

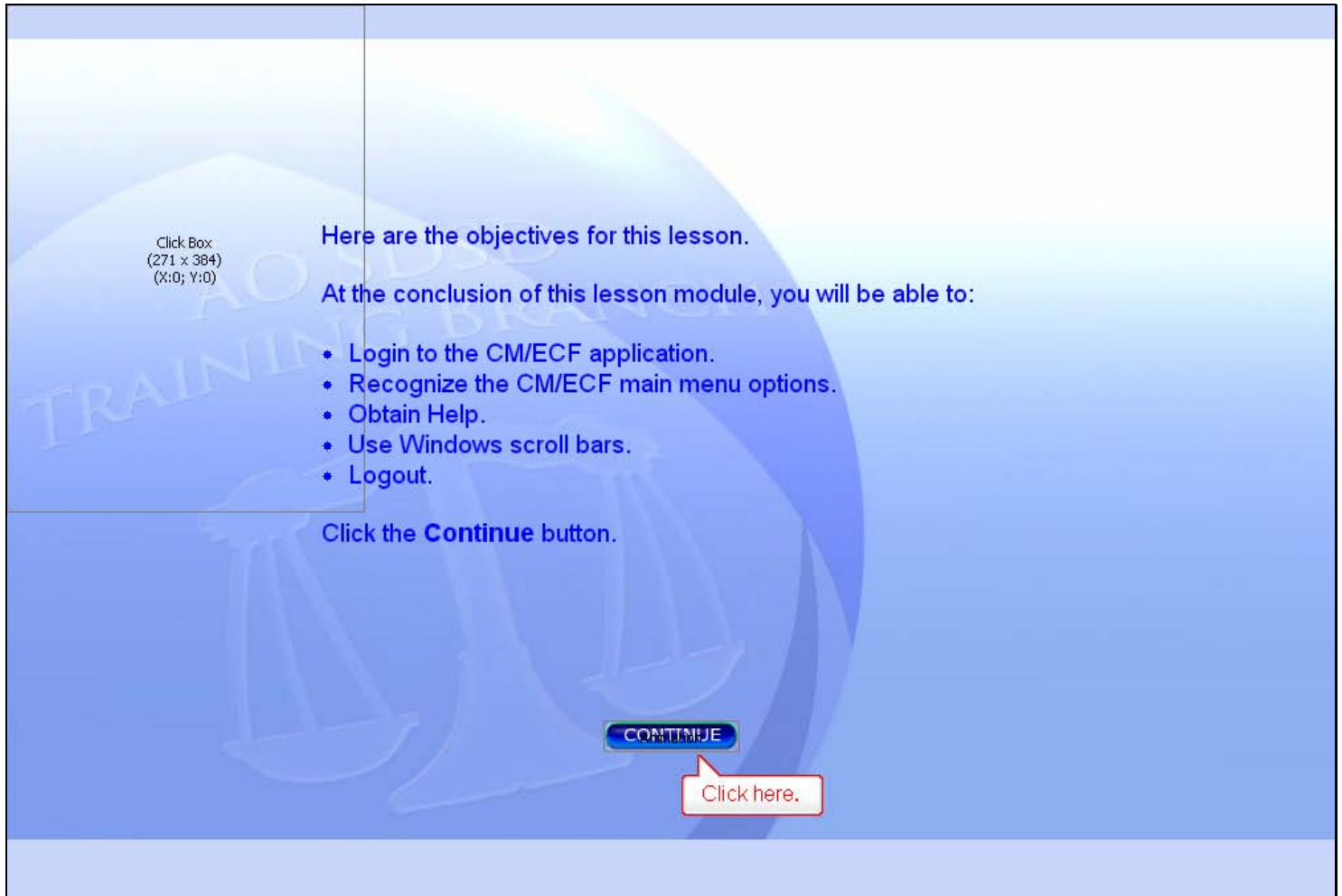


The slide content is overlaid on a background image of a blue globe with the text 'TRADING BRANCH' and 'START' visible. A small 'Click Box' label with coordinates '(X:0; Y:0)' is positioned near the top left of the text area.

## Slide notes

These are the instructions for how to navigate through this lesson module. When you're ready, click the Start button to begin the lesson.

## Slide 3 - Objectives



Click Box  
(271 x 384)  
(X:0; Y:0)

Here are the objectives for this lesson.

At the conclusion of this lesson module, you will be able to:

- Login to the CM/ECF application.
- Recognize the CM/ECF main menu options.
- Obtain Help.
- Use Windows scroll bars.
- Logout.

Click the **Continue** button.

CONTINUE

Click here.

The slide features a blue gradient background with a faint watermark of a scale of justice and the text 'AO CMECF TRAINING BRANCH'. A 'Click Box' is positioned on the left side. The main content is centered, starting with the heading 'Here are the objectives for this lesson.' followed by a list of five bullet points. Below the list, there is a 'Click the Continue button.' instruction. At the bottom center, there is a blue 'CONTINUE' button with a red callout box pointing to it that says 'Click here.'

## Slide notes

Here are the objectives for this lesson.

At the conclusion of this lesson module, you will be able to:

Login to the CM/ECF application.

Recognize the CM/ECF main menu options.

Obtain Help.

Use Windows scroll bars.

Logout.

Click the Continue button.

## Slide 4 - Filing Login

The slide features a blue background with a faint watermark of a scale of justice and the text 'AO S B S TRAINING'. On the left, a white box contains the text 'Click Box (271 x 384) (X:0; Y:0)'. In the center, blue text reads 'Before you begin to file electronically:' followed by a bulleted list: '• Filing login and password needed.', '• Should have both filing login and PACER login.', and '• Go to <http://pacer.psc.uscourts.gov>.' Below the list, it says 'Click the **Continue** button.' At the bottom center, there is a blue button with the word 'CONTINUE' in white. A red callout box with a white border points to the button, containing the text 'Click here.'

Click Box  
(271 x 384)  
(X:0; Y:0)

Before you begin to file electronically:

- Filing login and password needed.
- Should have both filing login and PACER login.
- Go to <http://pacer.psc.uscourts.gov>.

Click the **Continue** button.

CONTINUE

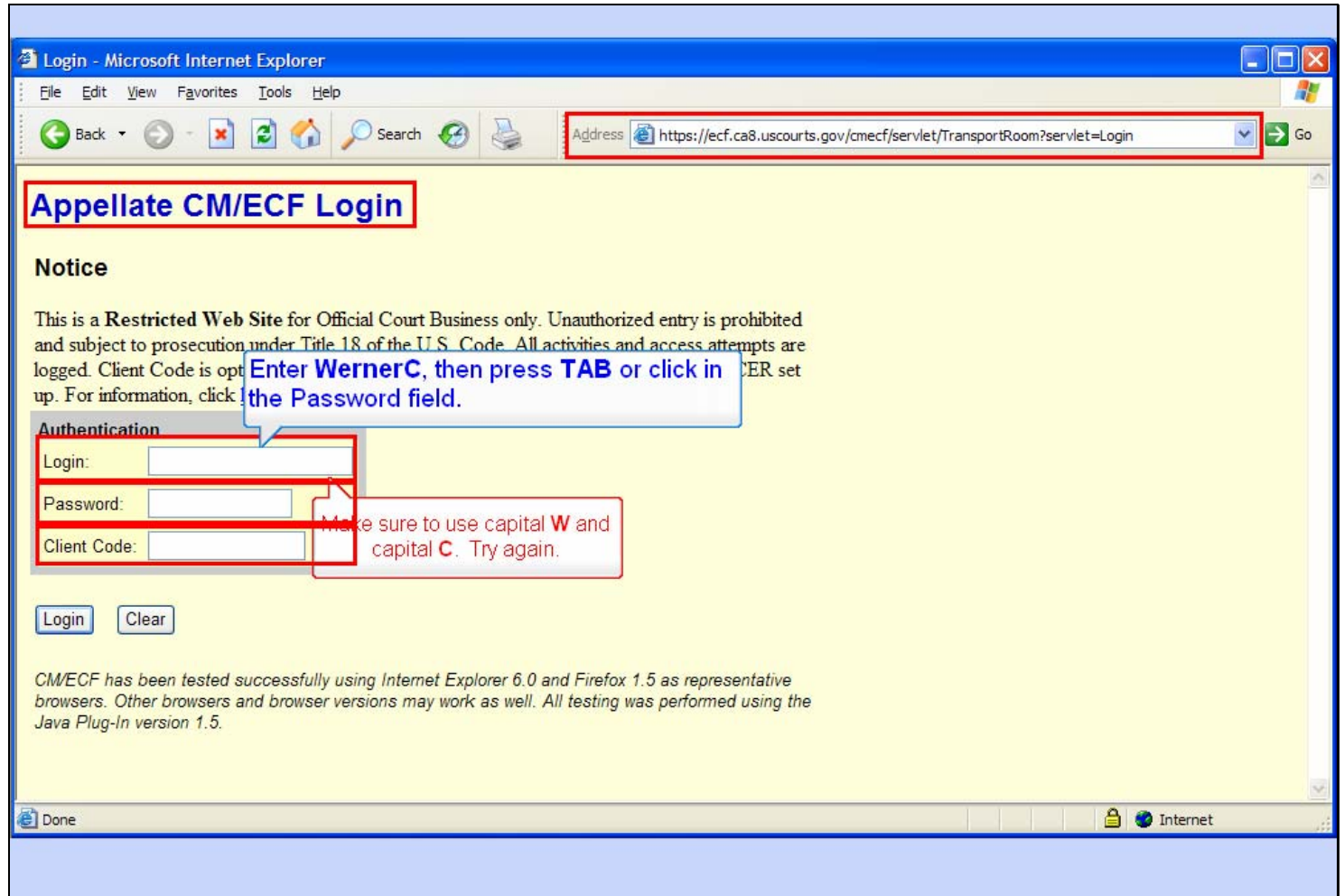
Click here.

## Slide notes

Before you login to CM/ECF let me mention that you need to obtain a filing login from the PACER Service Center in order to file electronically with the appellate courts. This filing login is in addition to any PACER account login you may already have. In order to fully use the appellate CM/ECF application, you should have both kinds of accounts. You can find the PACER Service Center's web site at <http://pacer.psc.uscourts.gov>.

Click the Continue button.

## Slide 5 - Login Screen



## Slide notes

In order to connect with the court's CM/ECF application, the first step is to enter the address of the system in your browser. You may want to consider bookmarking this address in your browser so you can access it easily.

The first screen you will see is the Appellate CM/ECF Login screen. On this screen you will enter your assigned Login and Password.

You may also optionally enter a Client Code. This code is to help you keep track of PACER charges for your various clients, but it can be left blank.

Both the login and password fields are case sensitive. This means you must enter them in upper or lower case exactly as they were assigned to you.

Let's begin a simulated login process. In the Login field, type "WernerC", then either press the TAB key or click in the Password field.

## Slide 6 - Password

**Appellate CM/ECF Login**

**Notice**

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged. Client Code is optional. It is only used if you already have automatic login to PACER set up. For information, click

**Authentication**

Login: WernerC

Password:

Client Code:

*CM/ECF has been tested successfully using Internet Explorer 6.0 and Firefox 1.5 as representative browsers. Other browsers and browser versions may work as well. All testing was performed using the Java Plug-In version 1.5.*

**Slide notes**

When you enter your password, CM/ECF will not display the characters you type but will disguise them.

Enter "Test2006" as your password, then press TAB or click in the Client Code field.

## Slide 7 - Client Code

Login - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://ecf.ca8.uscourts.gov/cmecf/servlet/TransportRoom?servlet=Login> Go

## Appellate CM/ECF Login

### Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged. Client Code is optional. It is only used if you already have automatic login to PACER set up. For information, click [here](#).

**Authentication**

Login:

Password:

Client Code:

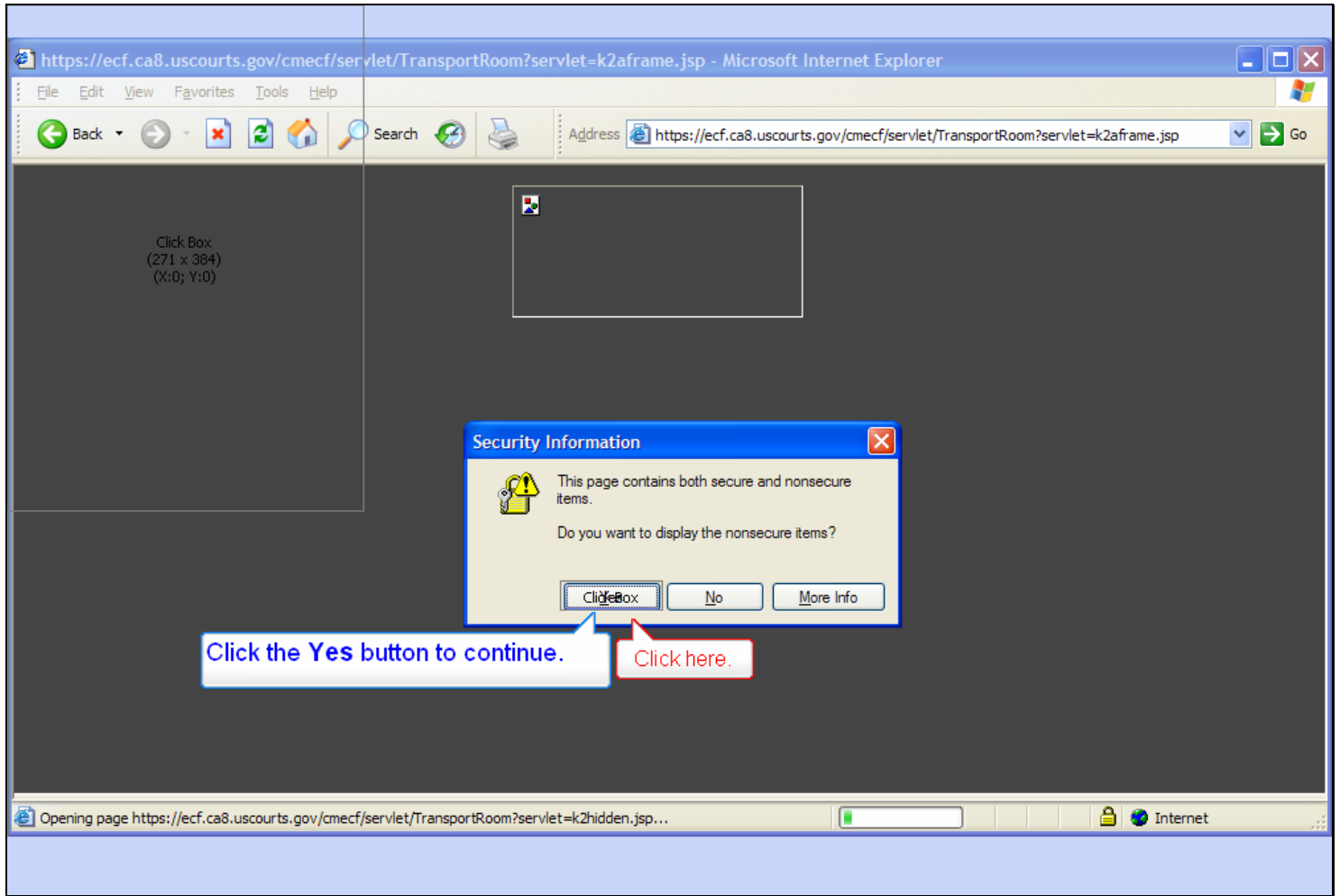
*CMECF has been tested successfully using Internet Explorer 6.0 and Firefox 1.5 as representative browsers. Other browsers and browser versions may work as well. All testing was performed using the Java Plug-In version 1.5.*

Done Internet

## Slide notes

Now enter Cunningham as a client code, then either press the Enter key on your keyboard, or click the Login button.

Slide 8 - Slide 8

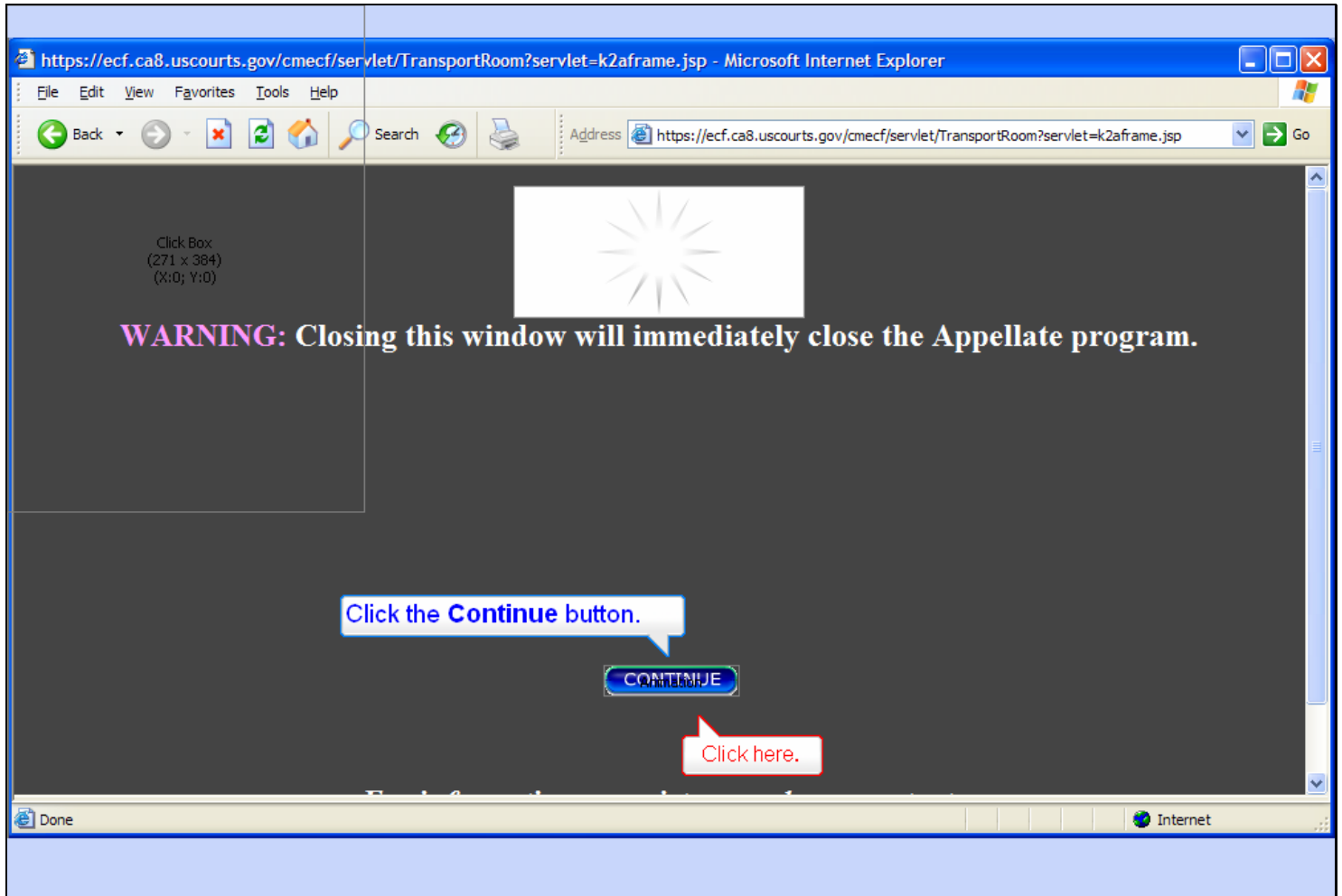


Slide notes

Your browser will show you a Security Information dialog box. Click the Yes button to continue.



## Slide 9 - Login 6

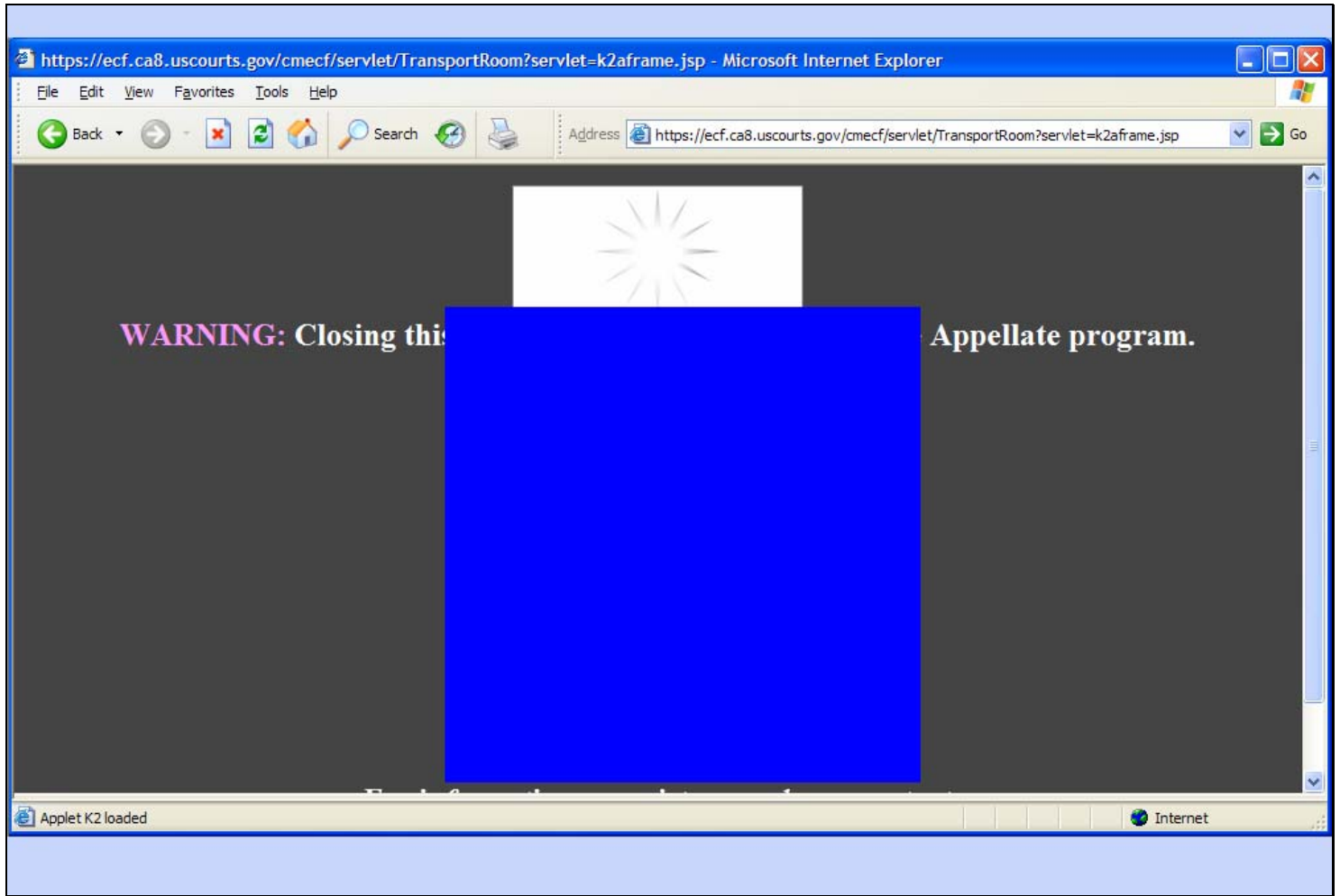


## Slide notes

Let's pause here for a moment. CM/ECF shows you a warning. When the program starts, two windows will be opened in your browser. This window will remain in the background, while a new window will open on top of it. The new window will be the one you use. This background window should not be closed until you're done with CM/ECF. If you do close it, it will close all the currently opened windows in the CM/ECF application.

Click the Continue button to resume.

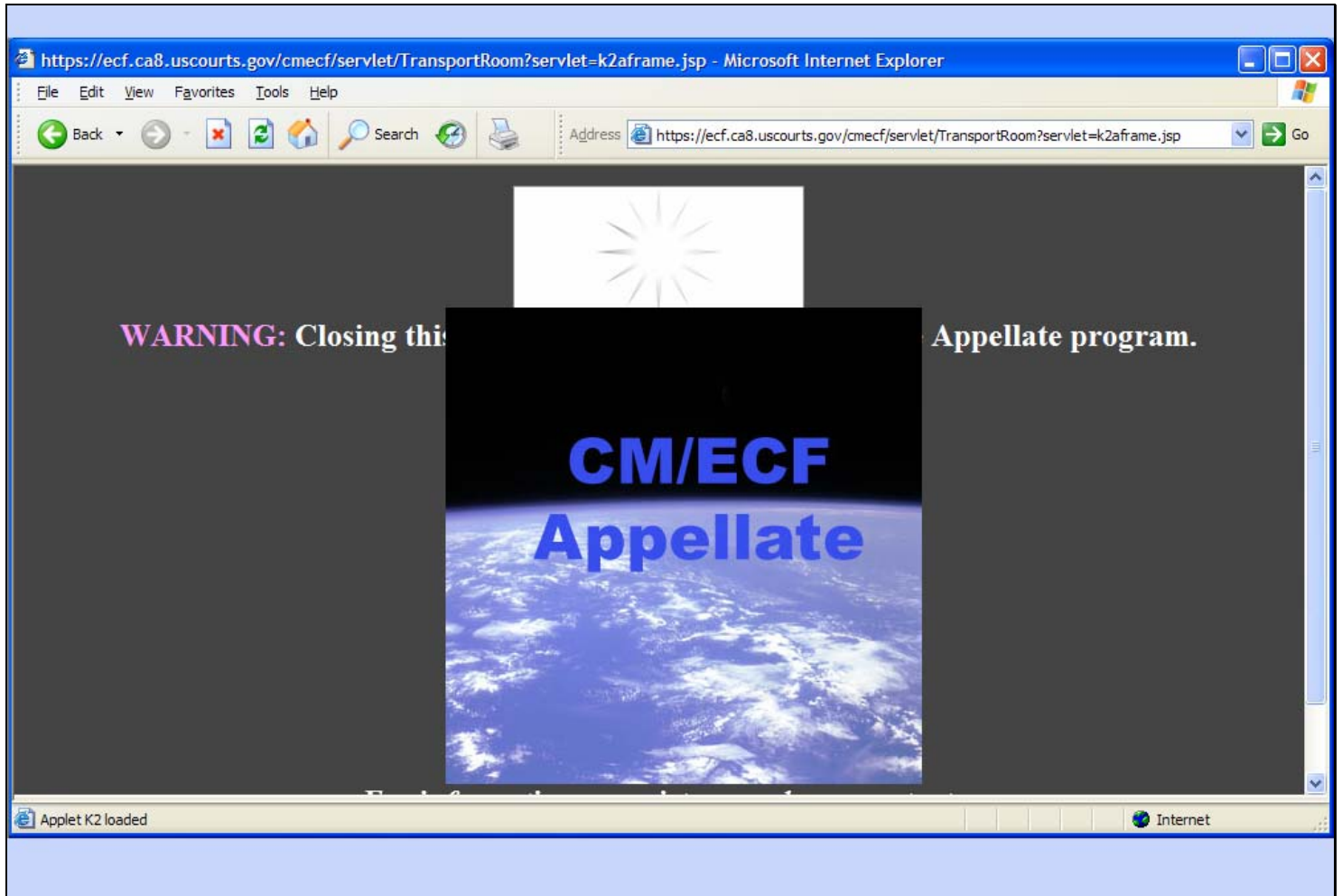
Slide 10 - Login 7



Slide notes

(Note: This is a transition slide)

Slide 11 - Login 8



Slide notes

(Note: This is a transition slide)

## Slide 12 - Startup Page

Click here.

Click Docketing.

Click Box  
(271 x 384)  
(X:0; Y:0)

U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System

*This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to the Federal Rules of Appellate Procedure, Rule 25. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials under 18USC152 and 3571.*

**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

And the Startup Page window opens.

This is the main window in CM/ECF. Let's take a quick tour of it.

Notice near the middle of the window your last login date and time are displayed.

In the upper right corner of the window are the normal Microsoft Windows controls to minimize, maximize, and close the window.

At the top left of the window is the main CM/ECF menu. These are the four options available to you. In this lesson, we will take a quick look at each of the menu items to see what they contain.

To use the main menu, click on the desired option. For example, click on Docketing in the menu.



## Slide 13 - Docketing Menu

Startup Page

Docketing Reports Logout Help

Docketing

Click here.

Click Reports.

Click Box  
(271 x 384)  
(X:0; Y:0)

UNITED STATES COURT OF APPEALS EIGHTH CIRCUIT

**U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

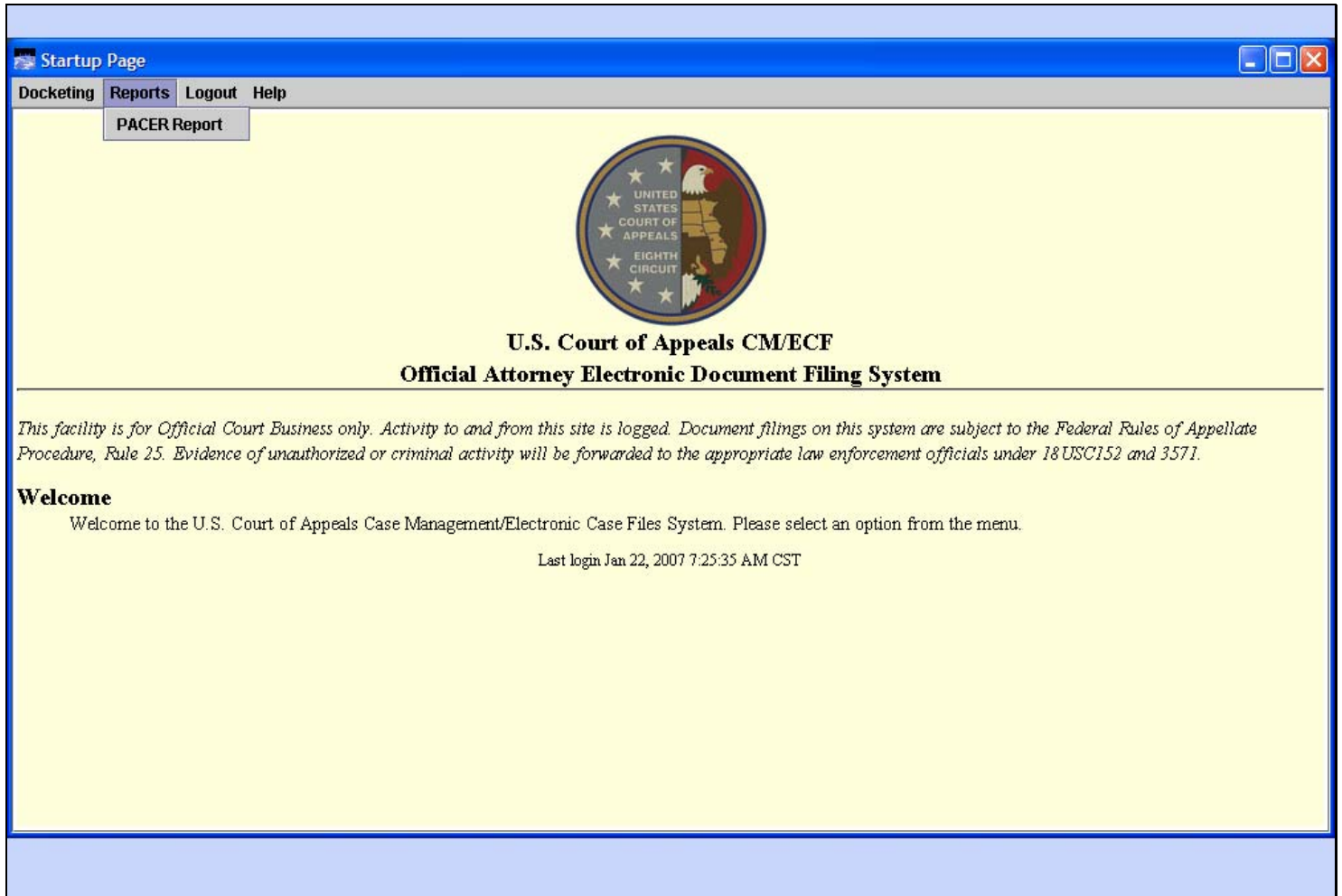
Last login Jan 22, 2007 7:25:35 AM CST

**Slide notes**

When you click a main menu option, a drop-down menu will appear. In this instance, the only further option is Docketing. We will explore Docketing in subsequent lesson modules.

For now, click Reports.

## Slide 14 - Reports Menu



Startup Page

Docketing Reports Logout Help

PACER Report

UNITED STATES COURT OF APPEALS EIGHTH CIRCUIT

**U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

The menu shows PACER Report as its option. PACER stands for Public Access to Courts Electronic Records, and is managed by the PACER Service Center. Any reports you create will be subject to the PACER public access fee.

Refer to the lesson module on PACER Reports for more information about this.

## Slide 15 - Help

Startup Page

Docketing Reports Logout **Help**

PACER Report

Click here.

Click Help.

Click Box  
(271 x 384)  
(X:0; Y:0)

UNITED STATES COURT OF APPEALS  
EIGHTH CIRCUIT

**U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

CM/ECF also has help built in. To view it's help feature, click on Help in the menu.



## Slide 16 - Help Menu

Startup Page


Docketing Reports Logout

Click here.

Click Help.

Click Box  
(271 x 384)  
(X:0; Y:0)

Help  
About CMECF



**U.S. Court of Appeals CM/ECF**  
**Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

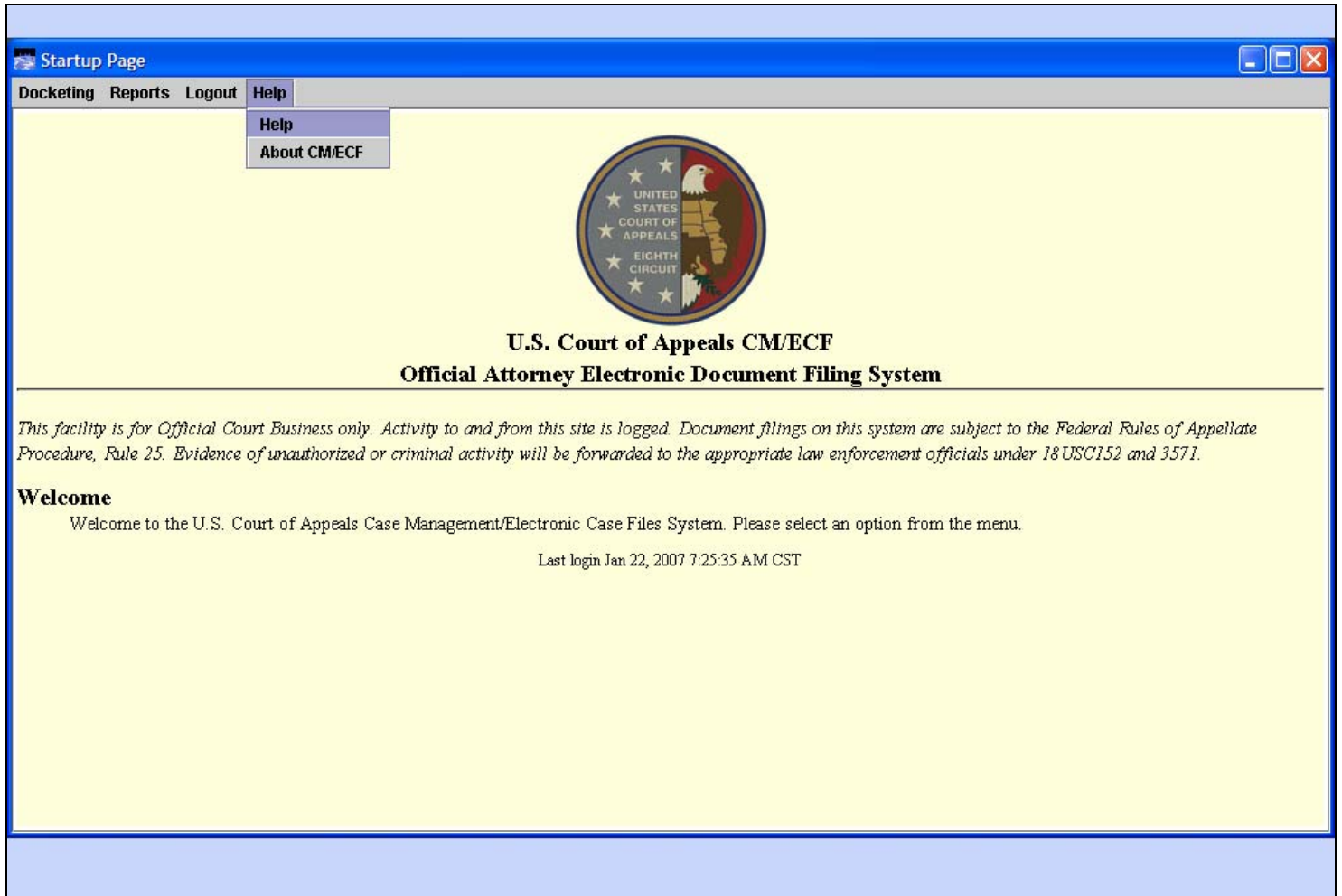
Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

The Help menu has two items, Help and About CM/ECF.

Let's see what help is available first. From the drop-down menu, click Help.

## Slide 17 - Slide 17



The screenshot shows a web browser window titled "Startup Page". The browser's address bar and menu bar are visible. The menu bar includes "Docketing", "Reports", "Logout", and "Help". The "Help" menu is open, showing "Help" and "About CMECF" options. The main content area has a yellow background and features the seal of the United States Court of Appeals, Eighth Circuit. Below the seal, the text reads "U.S. Court of Appeals CM/ECF Official Attorney Electronic Document Filing System". A disclaimer states: "This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to the Federal Rules of Appellate Procedure, Rule 25. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials under 18USC152 and 3571." Below the disclaimer, a "Welcome" section says: "Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu." At the bottom of the page, it says "Last login Jan 22, 2007 7:25:35 AM CST".

## Slide notes

(Note: This is a transition slide)

## Slide 18 - Help Table of Contents

Click Box  
(271 x 384)  
(X:0; Y:0)

# Table of Contents

## Help

- [Overview](#)
- [Docketing Menu](#)
- [Glossary](#)
- [Help Menu](#)

Downloaded (0 B) : Unknown Zone

## Slide notes

A help window opens. This is a multi-page document that explains the various options of CM/ECF. A table of contents is at the top. You can click on an item in the table of contents to jump to that part of the help window.

For example, click the hyperlink for Docketing Menu.

## Slide 19 - Help 2

https://ecf.ca8.uscourts.gov/cmecf/servlet/TransportRoom?servlet=ShowPage?page=help.pdf - Microsoft Internet Explorer

File Edit Go To Favorites Help

Back Forward Stop Home Search Refresh Print Address https://ecf.ca8.uscourts.gov/cmecf/servlet/TransportRoom?servlet=ShowPage?page=he Go

Save a Copy Print Search Select 72% Sign

Pages  
Click Box  
(271 x 384)  
(X:0; Y:0)

## Docketing Menu

### Help

Step 1 - Select the **Docketing** menu from the Startup Page and choose the **Docketing** option from the list to access the Event Selection screen.

Startup Page  
Docketing Reports Logout Help  
Docketing

Step 2 - Enter the case number (in the format of yy-mm-uu) into the Case field and press the **Tab** key. The application will verify the case number. If the case number cannot be retrieved, the user will receive the following warning message.

Invalid Case Number  
05-0674: Case Not Found  
The case number does not exist  
or the case has not been opened  
OK

8.50 x 11.00 in Click OK to close the message box and verify and enter the case number again.

6 of 94

Downloaded (0 B) : Unknown Zone

## Slide notes

CM/ECF jumps down to the page that explains the Docketing Menu.

The Table of Contents at the top can help jump to specific topics, or you can scroll up and down through the help pages.

## Slide 20 - Close Help

https://ecf.ca8.uscourts.gov/cmecf/servlet/TransportRoom?servlet=ShowPage?page=help.pdf - Microsoft Internet Explorer

File Edit Go To Favorites Help

Back Forward Stop Home Search Refresh Print Address https://ecf.ca8.uscourts.gov/cmecf/servlet/TransportRoom?servlet=ShowPage?p

Save a Copy Print Search Select 72% Sign

Click Box (271 x 384) (X:0; Y:0)

## Docketing Menu

### Help

Step 1 - Select the **Docketing** menu from the Startup Page and choose the **Docketing** option from the list to access the Event Selection screen.

Startup Page  
Docketing Reports Logout Help  
Docketing

Step 2 - Enter the case number (in the format of yy-mm-uu) into the Case field and press the **Tab** key. The application will verify the case number. If the case number cannot be retrieved, the user will receive the following warning message.

Invalid Case Number  
05-0674: Case Not Found  
The case number does not exist  
or the case has not been opened  
OK

8.50 x 11.00 in Click OK to close the message box and verify and enter the case number again.

6 of 94

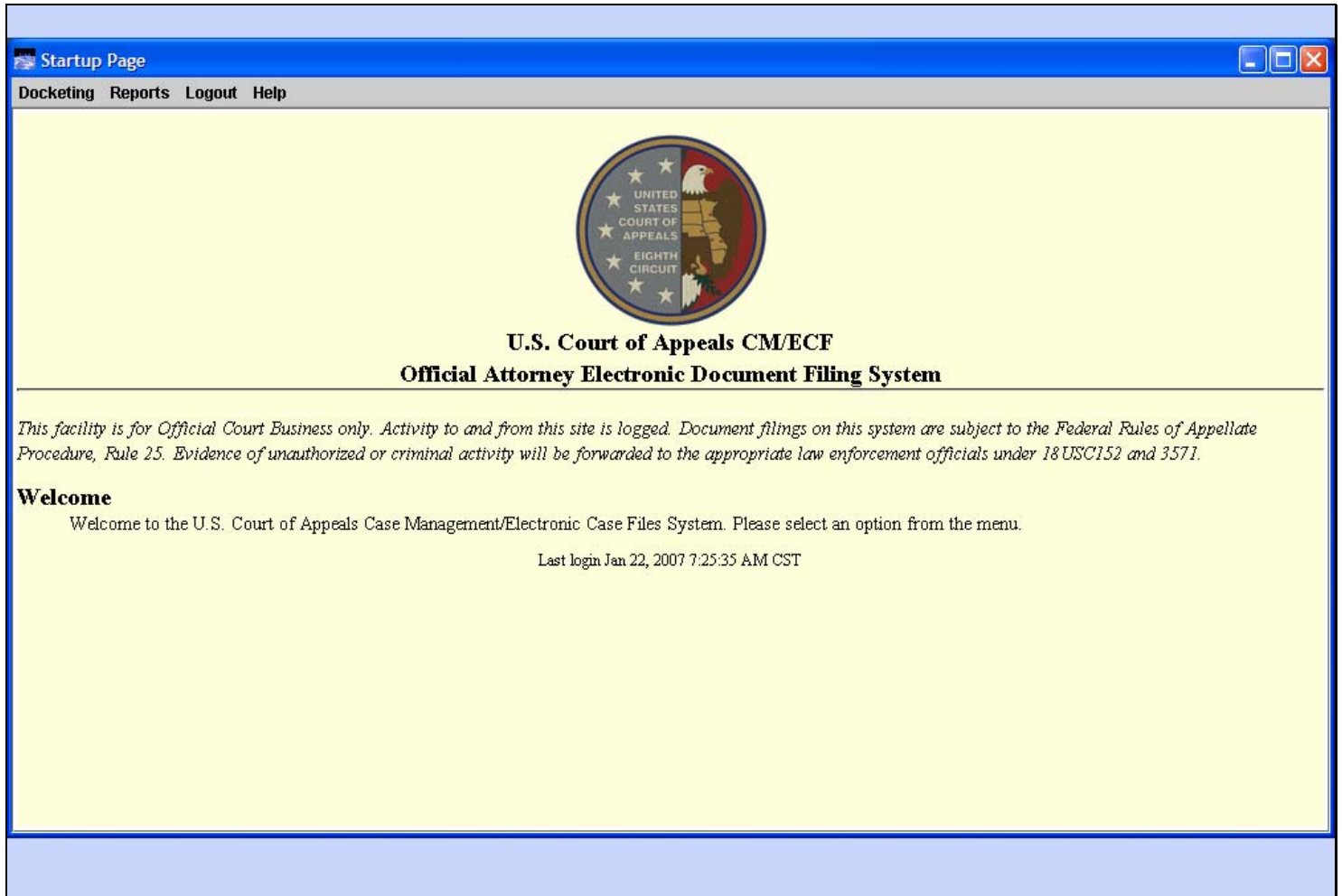
Downloaded (0 B) : Unknown Zone

Click here.

## Slide notes

To close the Help window, click its close button in the upper right corner of the window.

## Slide 21 - Scrolling



The screenshot shows a web browser window titled "Startup Page" with a blue header bar. Below the header is a navigation menu with links for "Docketing", "Reports", "Logout", and "Help". The main content area has a yellow background and features the official seal of the United States Court of Appeals, Eighth Circuit, centered at the top. The seal is circular with a blue border and contains a red and white eagle, a shield, and the text "UNITED STATES COURT OF APPEALS EIGHTH CIRCUIT". Below the seal, the text "U.S. Court of Appeals CM/ECF" and "Official Attorney Electronic Document Filing System" is displayed in bold. A horizontal line separates this header from a disclaimer paragraph: "This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to the Federal Rules of Appellate Procedure, Rule 25. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials under 18USC152 and 3571." Below the disclaimer, the word "Welcome" is followed by the text: "Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu." At the bottom of the page, the text "Last login Jan 22, 2007 7:25:35 AM CST" is displayed.

## Slide notes

As you saw in the help window, and in most browser-based applications, scrolling is sometimes necessary. While we're here, let's discuss scrolling in more detail.

## Slide 22 - Slide 22

**CM/ECF Appellate**

Docketing Appearance Filed

Docketing Reports Logout Help

Case 62-1100 Widget Company v. Big River Company

## Event Selection

Click Box (271 x 384) (X:0; Y:0)

Case:  Enter case number as yy-nnnn (e.g., 05-2475)

Filed Date: 02/05/2007

First select category of event:

- Appearance form
- Designations of Record
- Corporate Disclosure Statement
- Cert. of Appealability
- Forms A and B
- Motion
- Reply/Response
- Rehearing Petitions

Next select an event:

- Appearance Filed

Then check the box(es) for each additional case in which this event should be filed. Uncheck the box(es) for each case in which this event should NOT be filed. There will not be an opportunity to reselect any applied case(s) after this point.

Applied Case Selection

- 62-1100 Widget Company v. Big River Company (Target Case)

Click the down Click here.

**Slide notes**

Here is an example of a CM/ECF screen that has scroll bars.

There will be many occasions in CM/ECF where you need to scroll up or down, or left or right. Any time there is more information than will fit in the current window, CM/ECF will add scroll bars to the window or screen segment. These may be either horizontal or vertical, depending on the size of the window. These scroll bars are standard Windows controls.

To use the scroll bars, you would click the arrow in the scroll bar that points in the direction you want your view to move.

To scroll your view of this window down, click the down arrow at the bottom of the scroll bar.

## Slide 23 - Slide 23

The screenshot shows a web application window titled "Docketing Appearance Filed". The window has a menu bar with "Docketing", "Reports", "Logout", and "Help". The main content area is titled "Case 62-1100 Widget Company v. Big River Company". On the left side, there is a vertical banner that reads "CME/ECF Appellate".

The main content area is divided into two sections. The top section is titled "First select category of event:" and contains a list of radio buttons with the following options: "Appearance form" (selected), "Designations of Record", "Corporate Disclosure Statem", "Cert. of Appealability", "Forms A and B", "Motion", "Reply/Response", and "Rehearing Petitions". To the right of this list is a box titled "Next select an event:" containing a single radio button labeled "Appearance Filed" (selected).

Below these sections is a text instruction: "Then check the box(es) for each additional case in which this event should be filed. Uncheck the box(es) for each case in which this event should NOT be filed. There will not be an opportunity to reselect any applied case(s) after this point." Below this instruction is a box titled "Applied Case Selection" containing a single radio button labeled "62-1100 Widget Company v. Big River Company (Target Case)".

At the bottom of the main content area, there is a status line that reads "Total: 0 Selected: 0". To the right of this line are two buttons labeled "All" and "Reset". Below the status line and buttons is a "Docket Event" button.

**Slide notes**

And your view has been scrolled down to the bottom of the window.

You'll see this particular screen again in the lesson on Filing an Appearance.

Now let's return to our tour of the CM/ECF main menu.



## Slide 24 - Other Help Option

Startup Page

Docketing Reports Logout **Help**

Click here.

Click Help.

Click Box  
(271 x 384)  
(X:0; Y:0)

UNITED STATES COURT OF APPEALS  
EIGHTH CIRCUIT

**U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

Let's look at the other option in the Help Menu. Click Help again.

Slide 25 - Slide 25

Startup Page

Docketing Reports Logout Help


Click here.

Help

About CM/ECF

Click About CM/ECF.

Click Box  
(271 x 384)  
(X:0; Y:0)



**U.S. Court of Appeals CM/ECF**  
**Official Attorney Electronic Document Filing System**

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**Welcome**

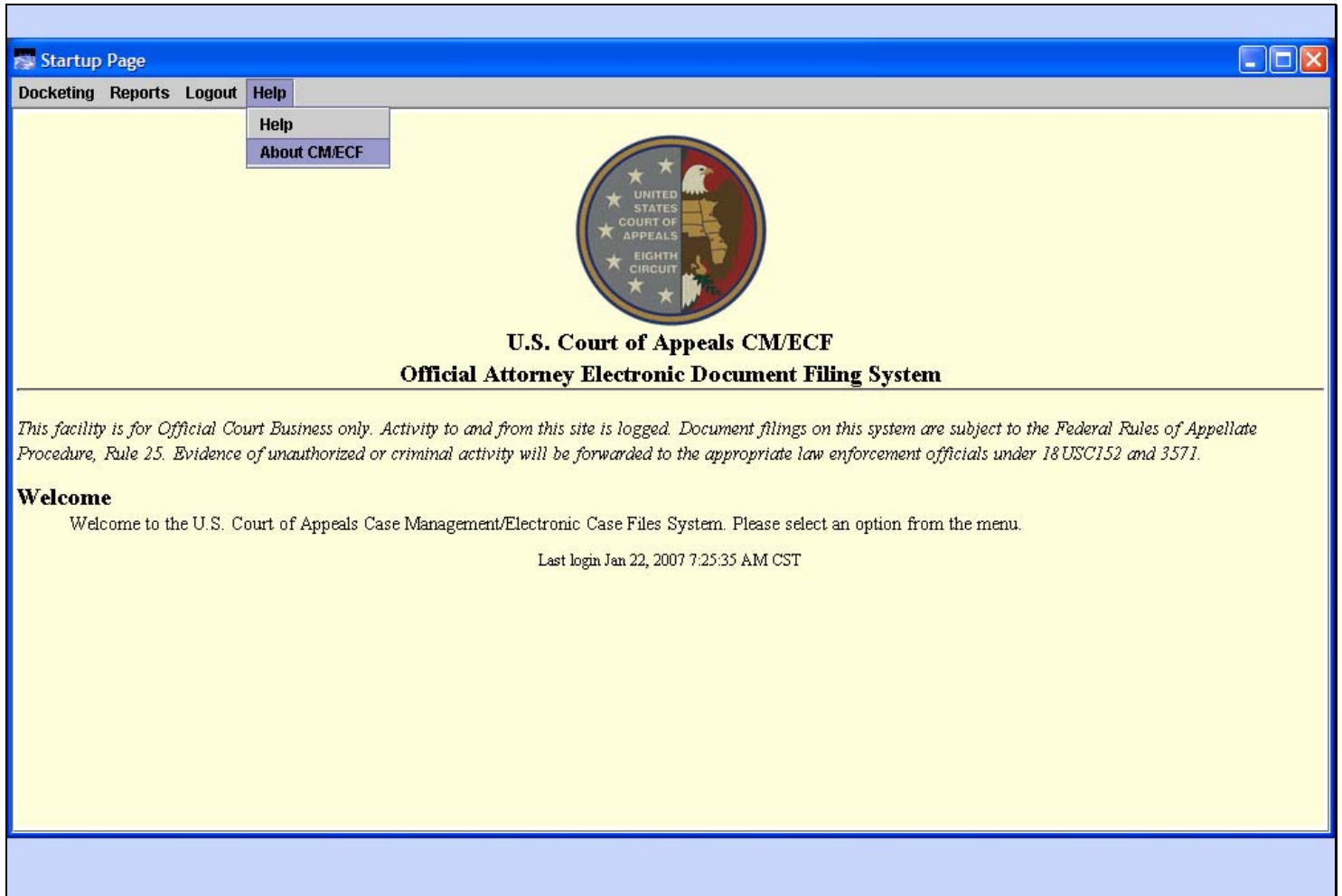
Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

Slide notes

Now click About CM/ECF.

## Slide 26 - About

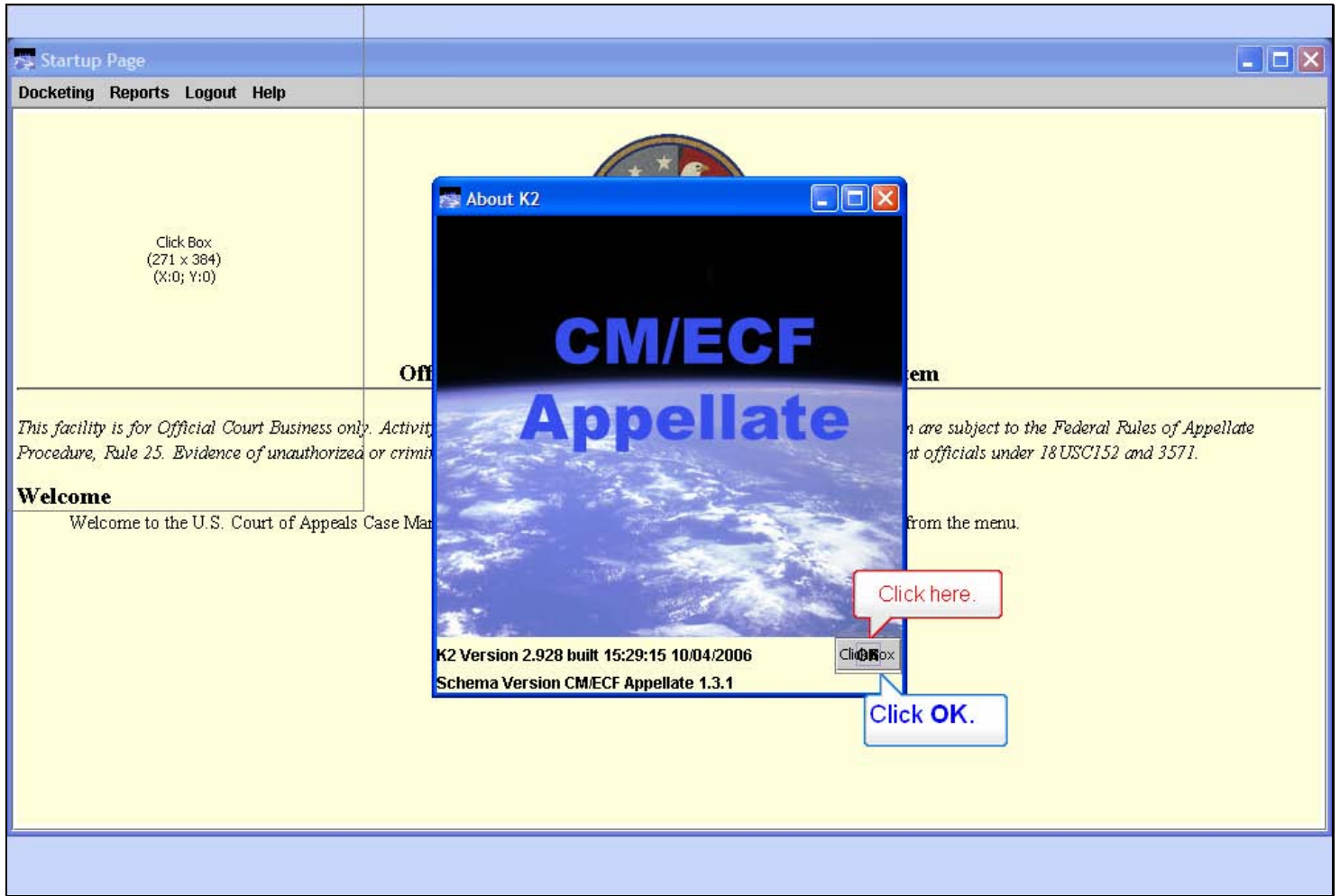


The screenshot shows a web browser window titled "Startup Page". The browser's address bar and menu bar are visible. The menu bar includes "Docketing", "Reports", "Logout", and "Help". The "Help" menu is open, showing "Help" and "About CMECF" options. The main content area has a yellow background and features the seal of the United States Court of Appeals, Eighth Circuit. Below the seal, the text reads "U.S. Court of Appeals CM/ECF Official Attorney Electronic Document Filing System". A disclaimer states: "This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to the Federal Rules of Appellate Procedure, Rule 25. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials under 18USC152 and 3571." A "Welcome" section follows, with the text: "Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu." Below this, it says "Last login Jan 22, 2007 7:25:35 AM CST".

## Slide notes

(Note: This is a transition slide)

Slide 27 - Slide 27



Slide notes

CM/ECF pops up a window which shows you the current version of the CM/ECF application.

Close the window by clicking OK.

## Slide 28 - Logout

Startup Page

Docketing Reports **Logout** Help

Click here.

Click Logout.

Click Box  
(271 x 384)  
(X:0; Y:0)

UNITED STATES COURT OF APPEALS EIGHTH CIRCUIT

**U.S. Court of Appeals CM/ECF  
Official Attorney Electronic Document Filing System**

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**Welcome**

Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

And that was a quick tour of the CM/ECF menu. The only option left is Logout.

You should always remember to log out when you're done. To do so, click Logout in the menu.

## Slide 29 - Logout Menu

Startup Page


Docketing Reports Logout Help

Logout CM/ECF

Click here.

Click Logout CM/ECF.

Click Box  
(271 x 384)  
(X:0; Y:0)



**U.S. Court of Appeals CM/ECF**  
**Official Attorney Electronic Document Filing System**

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**Welcome**

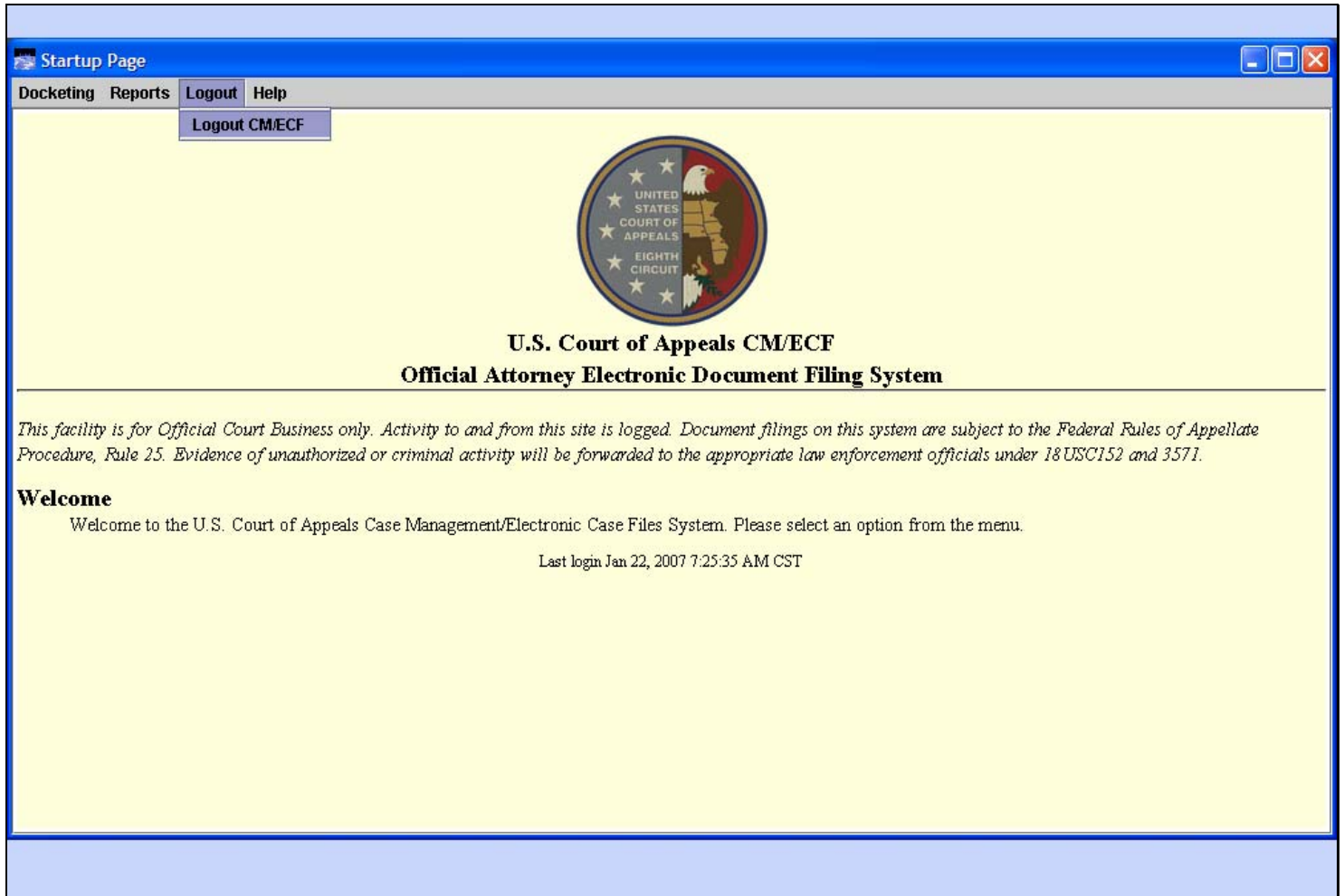
Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu.

Last login Jan 22, 2007 7:25:35 AM CST

## Slide notes

Now click Logout CM/ECF.

## Slide 30 - Slide 30

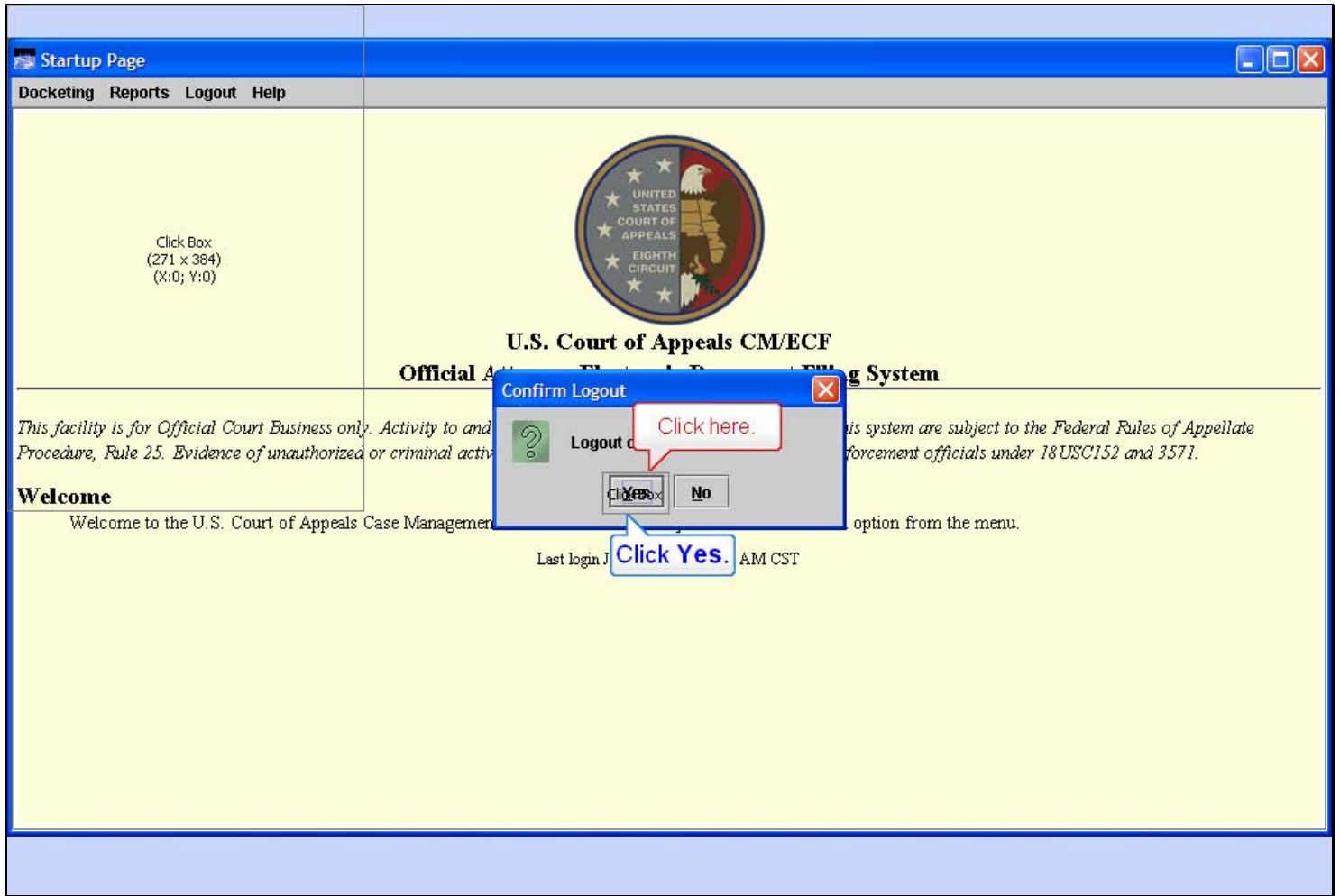


The screenshot shows a web browser window titled "Startup Page". The browser's address bar and menu bar are visible. The menu bar includes "Docketing", "Reports", "Logout", and "Help". A "Logout CMECF" button is located below the menu bar. The main content area features the official seal of the United States Court of Appeals, Eighth Circuit, which includes an eagle and the text "UNITED STATES COURT OF APPEALS EIGHTH CIRCUIT". Below the seal, the text reads "U.S. Court of Appeals CM/ECF Official Attorney Electronic Document Filing System". A disclaimer states: "This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to the Federal Rules of Appellate Procedure, Rule 25. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials under 18USC152 and 3571." A "Welcome" section follows, with the text: "Welcome to the U.S. Court of Appeals Case Management/Electronic Case Files System. Please select an option from the menu." and "Last login Jan 22, 2007 7:25:35 AM CST".

## Slide notes

(Note: This is a transition slide)

Slide 31 - Logout OK



Slide notes

Confirm you want to logout by clicking Yes.



**Slide 32 - Summary**

You should now be able to:

- ◆ Login to the application.
- ◆ Recognize the CM/ECF Main Menu options.
- ◆ Obtain Help.
- ◆ Use Windows scroll bars.
- ◆ Logout.

You may close this lesson's window by clicking its close button or by selecting Exit the Lesson from the menu, or you may use the playback controls to return to any desired section of the lesson.

Click Box

**Slide notes**

This concludes the Introduction to CM/ECF lesson module.

You should now be able to:

Login to the application.

Recognize the CM/ECF Main Menu options.

Obtain Help.

Use Windows scroll bars.

Logout.

You may close this lesson's window by clicking its close button or by selecting Exit the Lesson from the menu, or you may use the playback controls to return to any desired section of the lesson.

Slide 33 - Exit



Slide notes

Goodbye