CM/ECF Version 3.1

New Features for Attorneys and Law Firm Staff

USDC, Northern District of Ohio

November 2007
CM/ECF Version 3.1
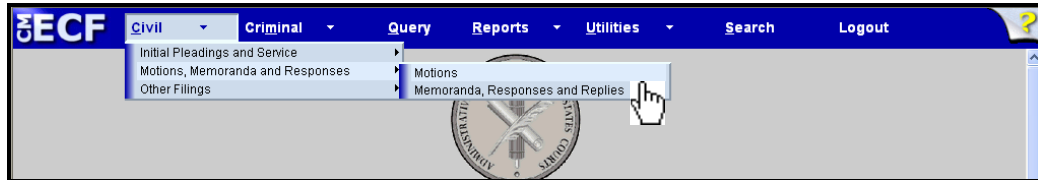
ENHANCEMENTS AFFECTING ATTORNEYS AND LAW FIRM STAFF

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Cascading Menus

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. To use the keyboard to display a sub-menu, press and hold the **ALT** 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.

Placing the mouse pointer over a primary sub-menu option displays the lower level sub-menu. Click the desired menu category to display the events on that menu.

Search Menus and Events

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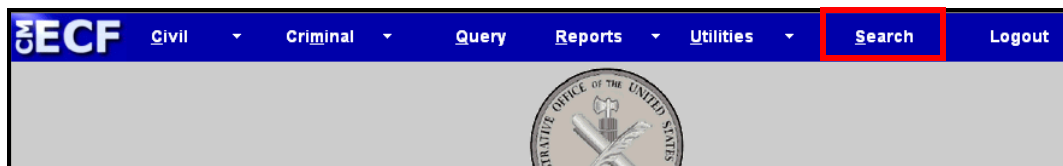
Clicking on Search displays the Search Menus and Events window.

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 Recommendations event, type "objection" in the box and click the Search button.
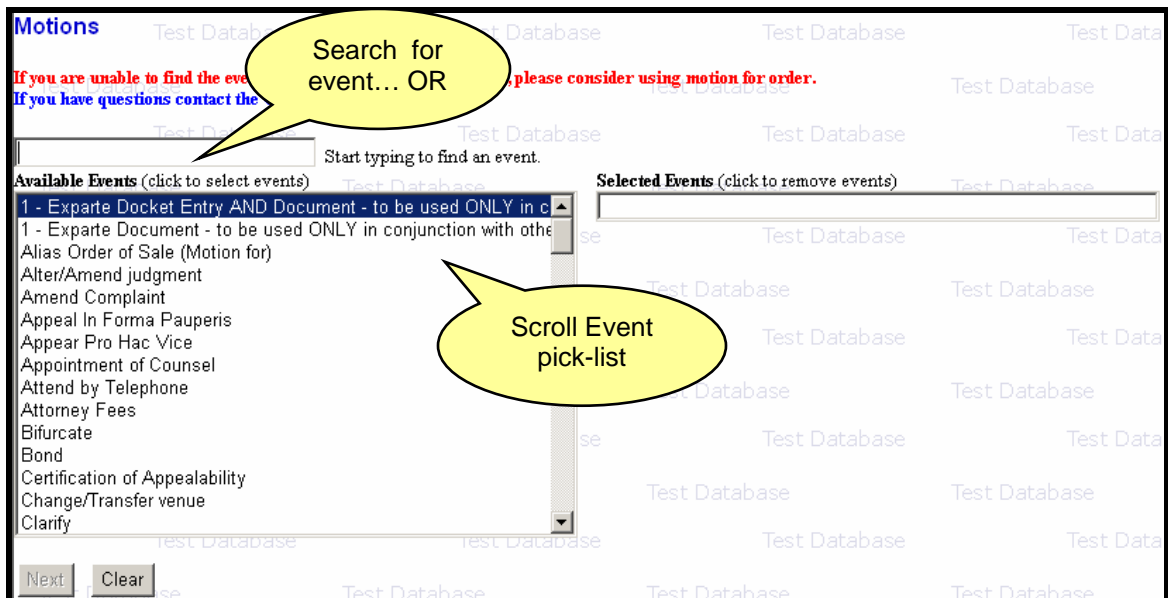
CM/ECF will display a list of events which contain the entered word or string of words and the menu on which the event can be found.
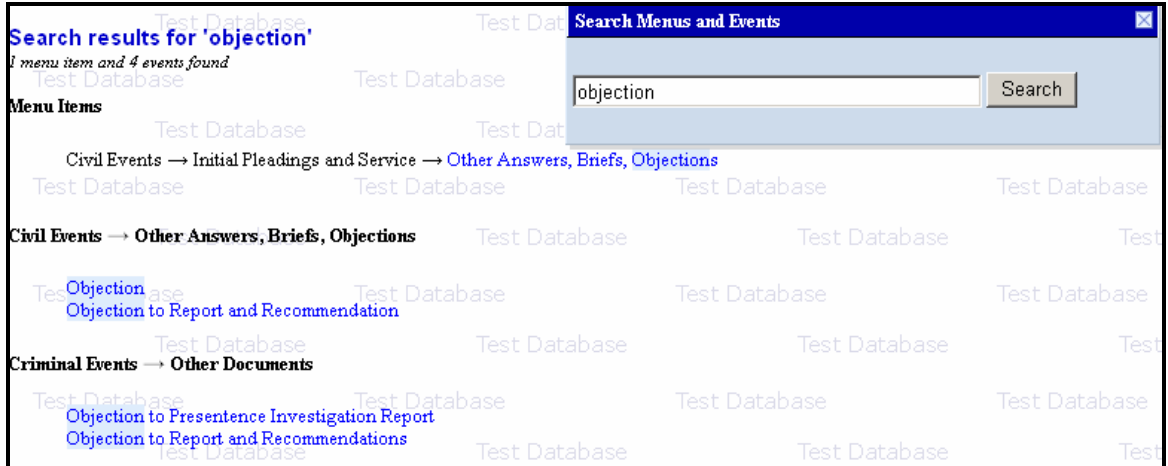
To file the document, simply click on the appropriate event.

Event Search within a Category

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

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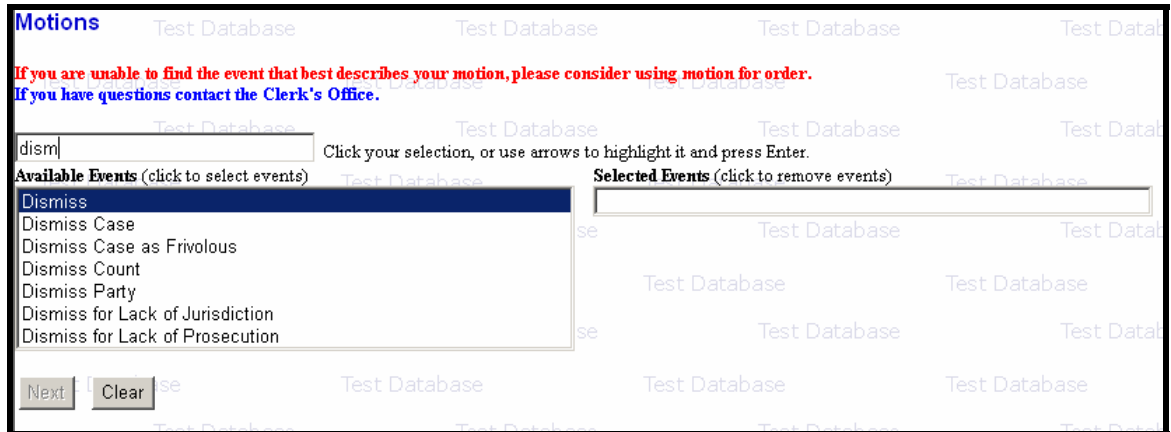
Note: The search will begin with the first letter typed; therefore, the search function does not accommodate the use of wildcard characters.

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 remove it from the list.
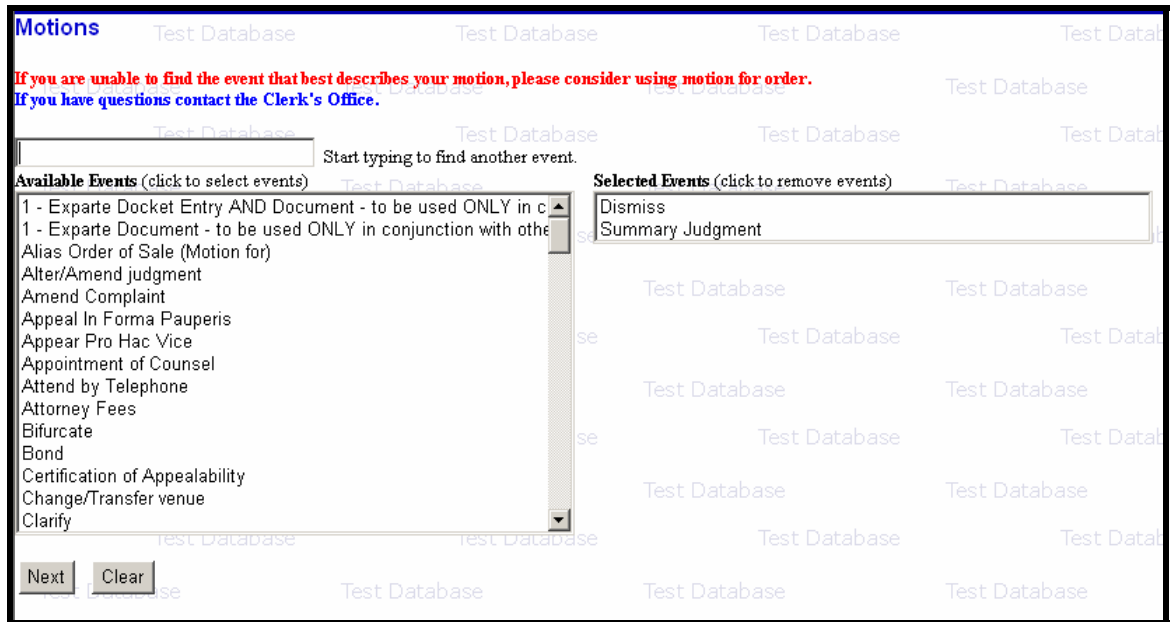
Once all of the necessary events have been selected, click the [Next] button to continue.

**Searching for a Case Number**

The Case Number look-up screen has been modified to reduce the number of screens a user must navigate to find a full case number.
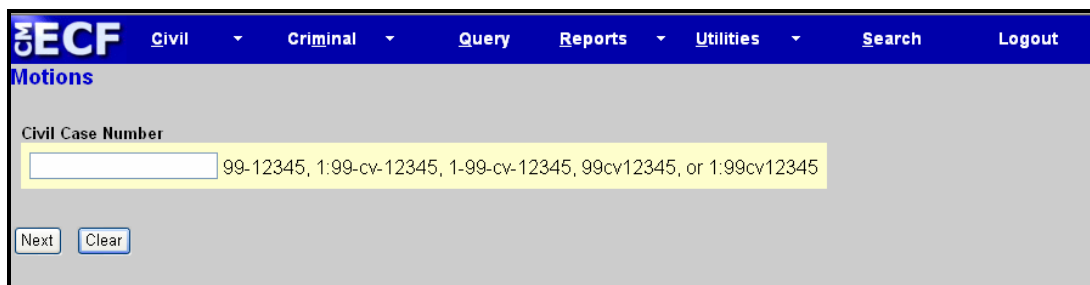
After a partial case number is entered, the screen shown on the next page will automatically display.

Once a partial case number is entered, click the Find This Case button to begin the case number look-up process**.**

The Next button remains grayed out until a full case number is selected.
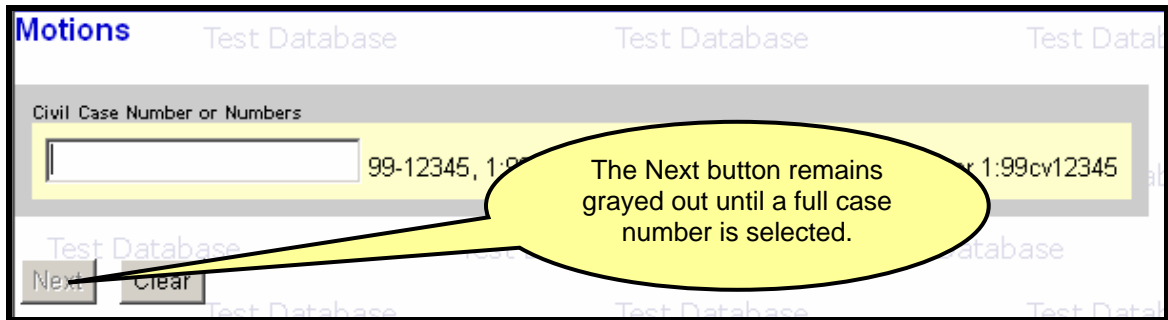
When only a portion of a case number is entered, all possible case number matches will display on the same screen as the initial look-up field.

Selecting a case number checkbox activates the Next button.
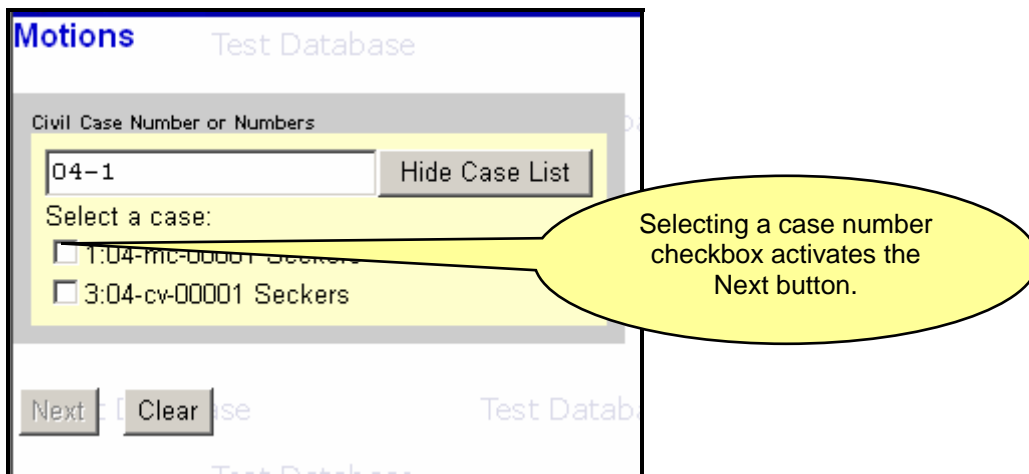
Once the full case number is located, select the proper case number checkbox to continue with docketing.

Notice of Electronic Filing (NEF)

If a user selects the hyperlink to a document from the Notice of Electronic Filing, the user will be asked for a CM/ECF login for Civil Social Security Appeal cases and any Criminal cases that were opened prior to November 1, 2004, and any document that has a restriction set. Users will receive their first look for free. This free view is only available during the first 15 days after the docket entry is made.

If the user accesses the same document again, he or she will have to log in (if he or she is not already logged in) and will be charged; to avoid additional charges, the user should download the document during the first (free) viewing.

A free view of non-restricted case documents is not available to those who receive e-mail notification but are not participants in the case; only case participants receive the "one free look" at documents accessed from an NEF.

Pay.gov Enhancements

The CM/ECF software was modified to allow attorneys paying filing fees via the Internet to choose whether they want to pay via credit card or Automated Clearing House (ACH), also referred to as DirectDebit. A new Pay.gov screen prompts the user to select the preferred method of payment for the current transaction.

Cross - Document Hyperlinks

CM/ECF users can file PDF documents that include hyperlinks to:
- previously filed documents in the *same case*.
- previously filed documents in *other cases that reside in the court's CM/ECF database*.
- previously filed documents in cases that reside in *other court's CM/ECF database*s.

Things to Remember:

- Cross - Document Hyperlink functionality applies only to documents associated with CM/ECF docket entries.

- Hyperlinks may link to the start of a document or to a specific page in the document.

- Users can file main documents that include hyperlinks to attachment documents that are part of the same docketing transaction.

- Hyperlinks to CM/ECF documents are retained as long as the case remains in the primary CM/ECF database.

- Hyperlinks to restricted documents are not accessible unless users have appropriate permissions.

- Any documents that includes a hyperlink must also include a description of the standard citation to the hyperlinked material. The hyperlink is a convenience, not a citation replacement.

- CM/ECF does not verify URL addresses included as hyperlinks within documents.

- Cross - Document Hyperlink functionality works with WordPerfect 11 or higher and Word 2002 or higher.

This document will summarize how to create Cross - Document Hyperlinks, within the same court's CM/ECF database, using WordPerfect. Specific details and instructions for creating links using Microsoft Word may be found in the District CM/ECF 3.1 Release Notes.

USING WORDPERFECT TO CREATE HYPERLINKS TO PREVIOUSLY FILED CM/ECF DOCUMENTS.

STEP 1   Run the Docket Report for the case that contains the document to be linked. (Other CM/ECF reports containing document links may also be used.)

STEP 2   Locate the document.

STEP 3   Copy the URL of the document: **(See Figure 1.)**
- Place the mouse cursor over the **document link** (*not NEF receipt link*) and right click.
- Select **Copy Shortcut** (*Internet Explorer/Netscape*) OR Copy Link Location (*Firefox*)
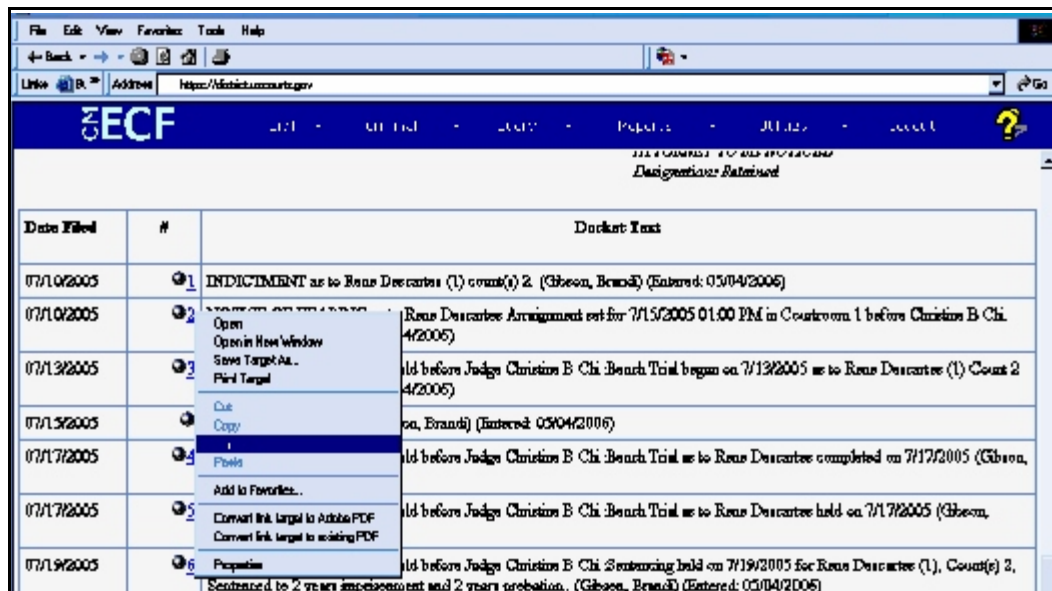

Figure 1 - Copy Shortcut

Note:

Users should NOT copy hyperlinks from Notices of Electronic Filing. NEFs contain special information associated with the "free look" to qualified recipients and should not be used for Cross-Document Hyperlinks.

STEP 4   Open WordPerfect and locate the document to which the hyperlink should be added. **(See Figure 2.)**
- Select and **highlight the appropriate text** to be hyperlinked, such as "Memorandum of Law" shown in the Figure 2 example.
- Click **Tools** on the menu toolbar.
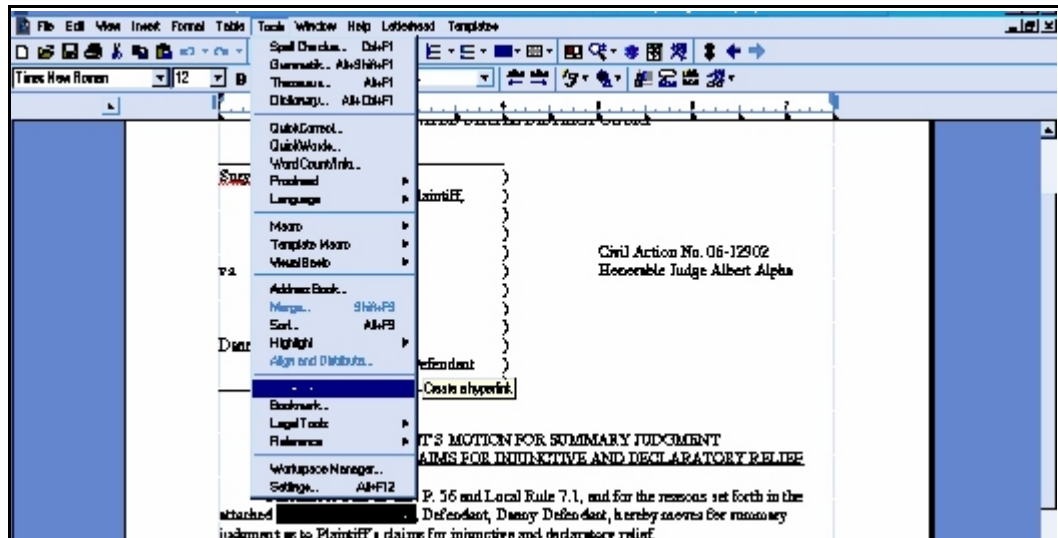- Select **Hyperlink** from the drop-down list.

Figure 2 - Create Hyperlink

STEP 5   Next, the Hyperlink Properties dialog box appears. **(See Figure 3.)**
- **Paste** the URL of the document copied in Step 1 into the **Document/Macro** field.
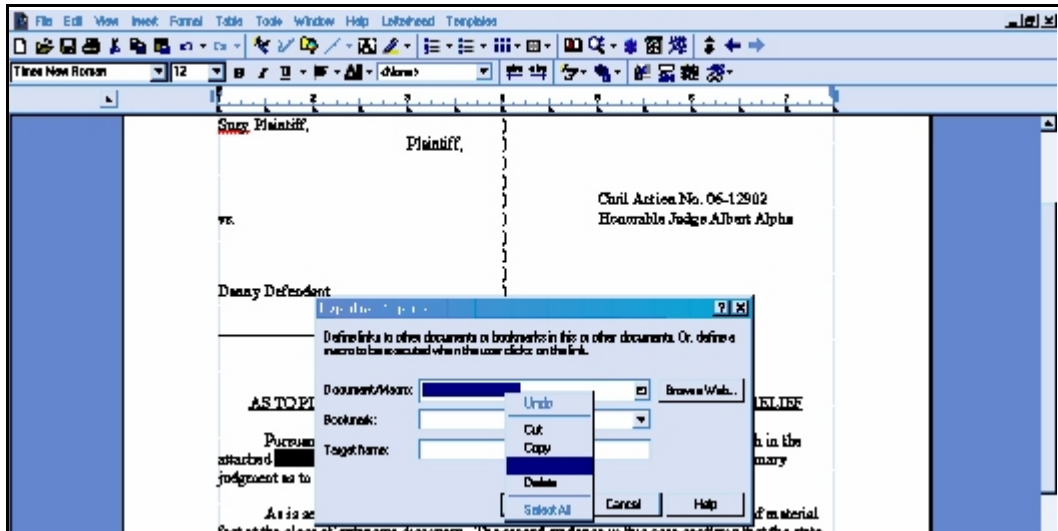- Click the **OK** button.

Figure 3 - Paste Hyperlinked Document URL

Note:

Users may append to the URL a specific page number within the document by adding *?page=<pagenumber>* at the end of the URL. Please refer to District CM/ECF 3.1 Release Notes for detailed instructions.

STEP 6   The next step is to convert the WordPerfect document to PDF format. (See Figure 4.)
   • Click **File** on the menu toolbar.
   • Select **Publish to... then PDF**.

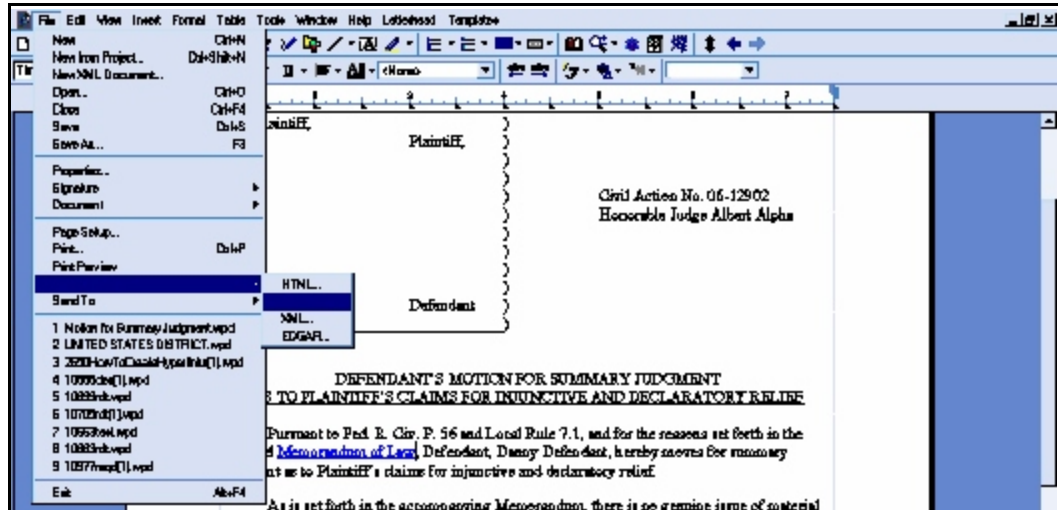**STEP 7**   **Save** the document.

Figure 4 - Publish to PDF

Things to Remember:

   • Do not print a WordPerfect document to Adobe PDF Writer for Cross - Document Hyperlinks functionality.
   • Publish to PDF <u>must</u> be used if a document contains a hyperlink.

STEP 8   Docket the appropriate CM/ECF event and associate the PDF document as usual.

USING WORDPERFECT TO CREATE HYPERLINKS BETWEEN DOCUMENTS FILED IN THE SAME EVENT.

STEP 1   Using WordPerfect, create the attachment document (secondary document) to which the main document will be linked.

STEP 2   Save the document.

STEP 3   Publish the attachment document to PDF. (See STEP 6 above.)

STEP 4   Create and save the main WordPerfect document. (The document that will have the hyperlink to the attachment document.)

STEP 5   Open the main WordPerfect document.
   - **Select the text** to be displayed as a hyperlink.
   - Click **Tools** on the menu toolbar.
   - Select **Hyperlink** from the drop-down selection.

STEP 6   Displayed next is the Hyperlink Properties dialog box. Click the **Folder icon** located to the right of the Document/Macro field. **(See Figure 5.)**
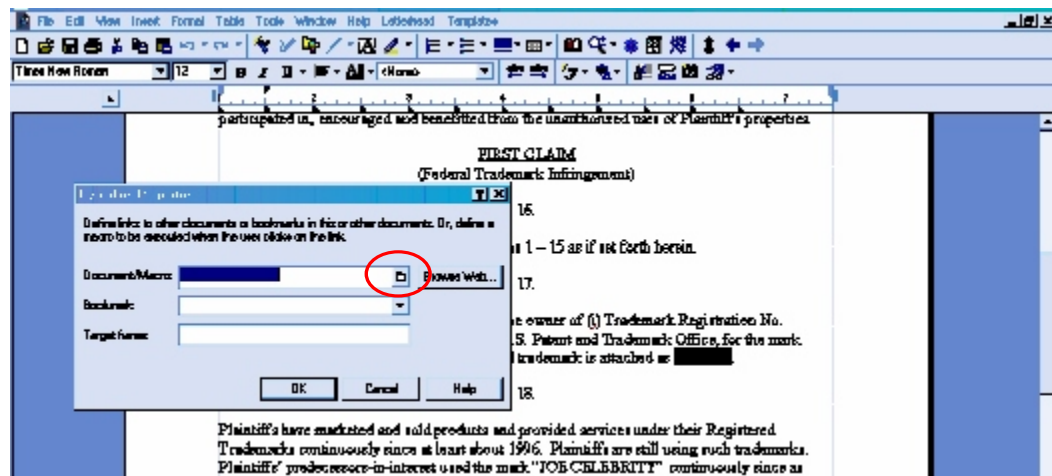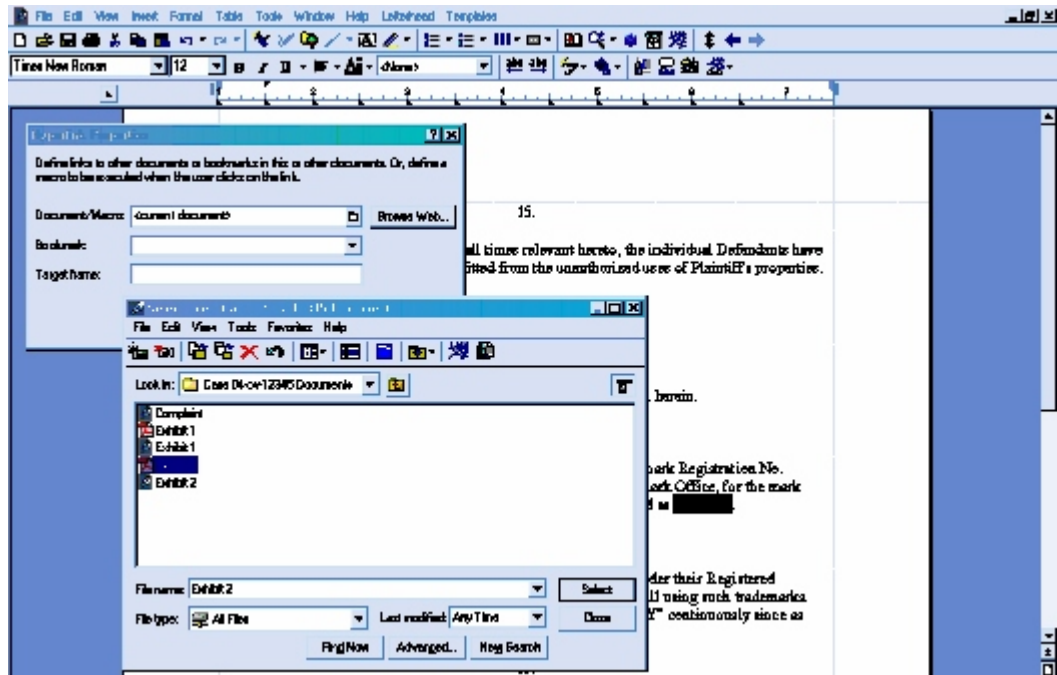

Figure 5 - Create Secondary Document Hyperlink

STEP 7   Navigate to the folder that contains the secondary document (attachment document) to be linked. **(See Figure 6.)**
   - **Highlight** the **file name**.
   - Click the **Select** button.
   - Click **OK** on the **Hyperlink Properties** dialog box.

Note:

The file selected to be linked must be in .pdf format.

Figure 6 - Select Secondary Document File

STEP 8   **Save** the main WordPerfect document.

STEP 9   **Publish** the document **to PDF**. (See STEP 6 in the Creating Hyperlinks to Previously filed Document section.)

STEP 10   Docket the appropriate CM/ECF event and associate the main document and attachment document as usual.