CM/ECF Version 3.1
New Features for Attorney Users

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Cascading Menus

You have the option of using the new cascading menus or continuing to use the existing static menus.
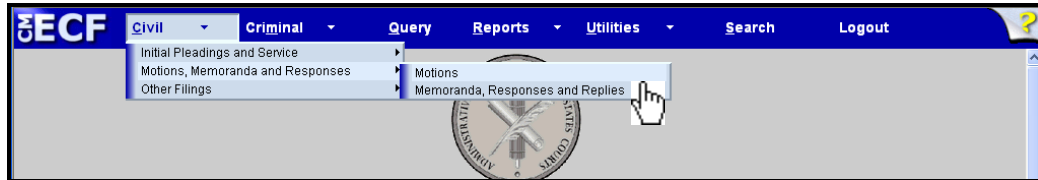
Notice the Civil, Criminal, Reports, and Utilities selections have a down arrow next to them, which indicates the presence of a sub-menu. To use the keyboard to display a sub-menu, press and hold the **ALT** key together with the underlined letter in the menu name (ALT + C).

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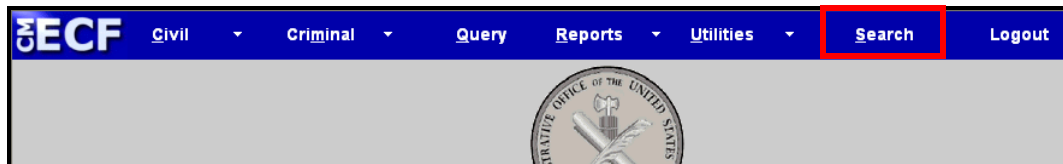
Clicking on Search displays the Search Menus and Events window.
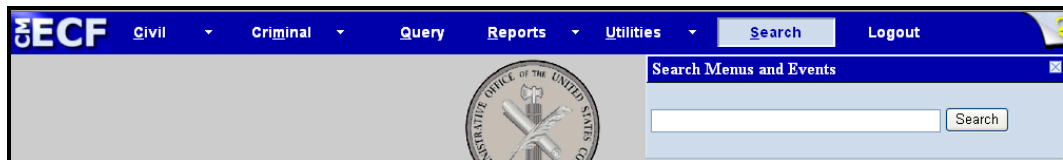
In this window enter all or part of the name of the event to be found. For example, to find an Objection to Report and Recommendations event, type "objection" in the box and click the Search button.

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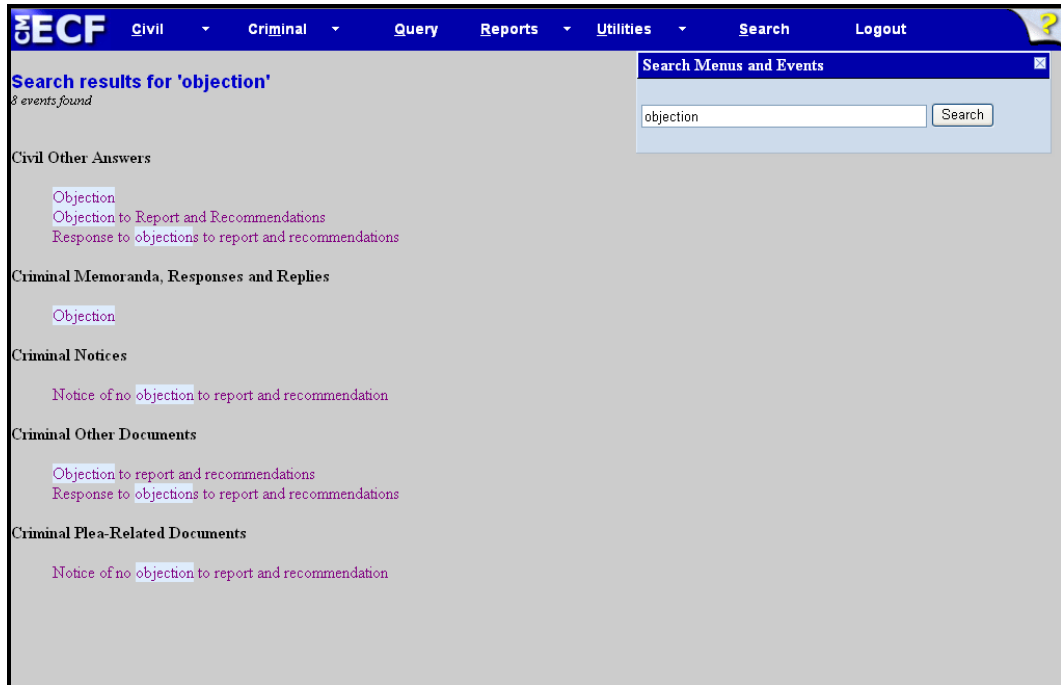
To file the document, simply click on the appropriate event.

Event Search within a Category
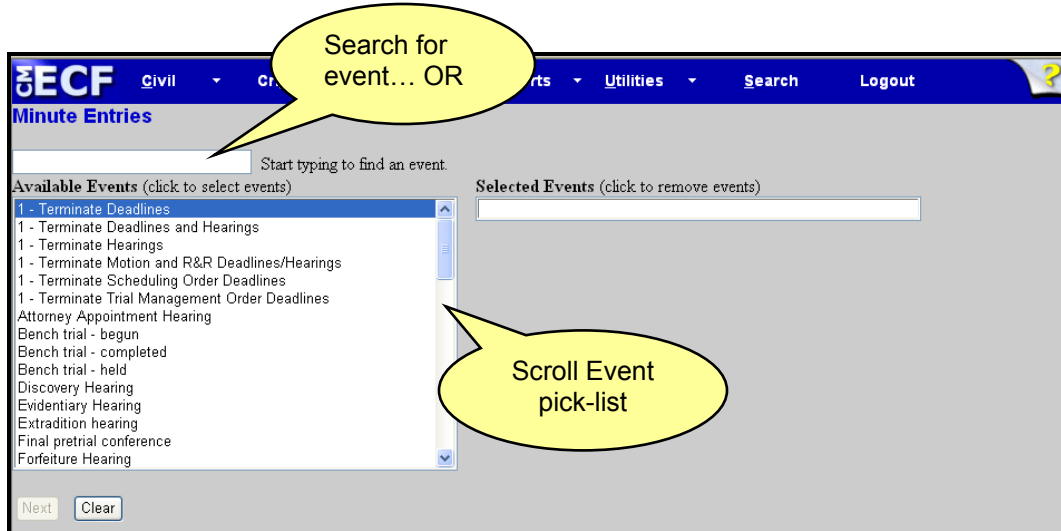
After selecting an event category, CM/ECF will display a list of events within the category and an event search box. This is an example of the Minute Entries category.   (Obviously attorneys would not be filing minute entries; searching for an event in any event category works exactly the same.

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 Motion Hearing event, type "mot" 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.
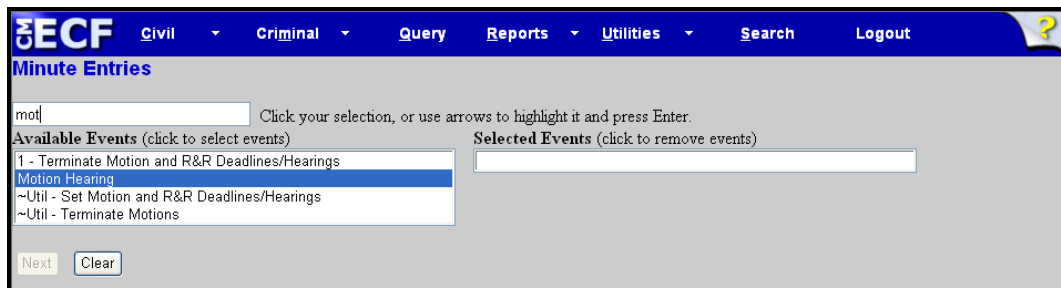
Note: The search will begin with the first letter typed; therefore, the search function does not accommodate the use of wildcard characters.

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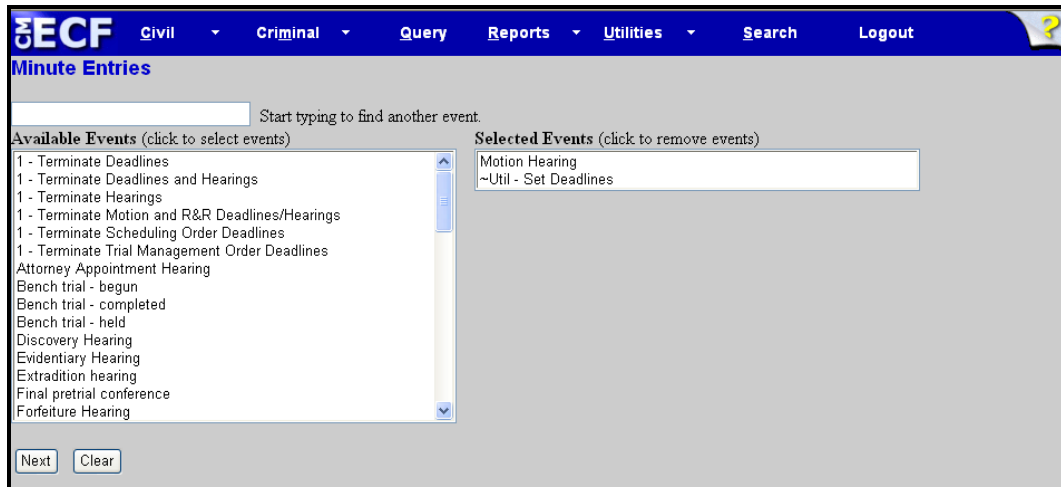
Once all of the necessary events have been selected, click the [Next] button to continue.

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.
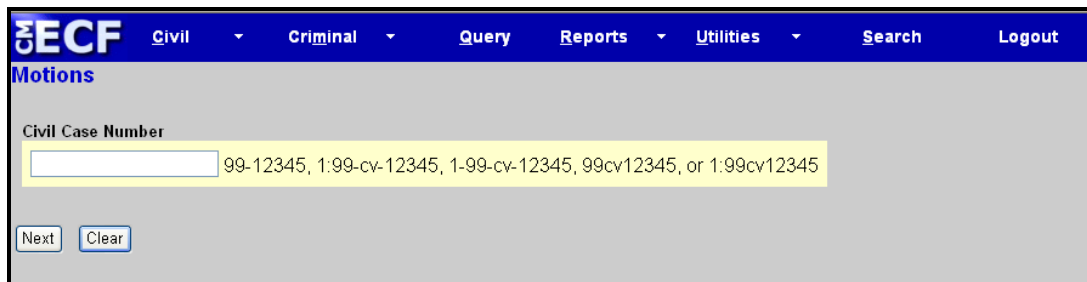
After a partial case number is entered, the screen shown on the next page will automatically display.

Once a partial case number is entered, click the Find This Case button to begin the case number look-up process.
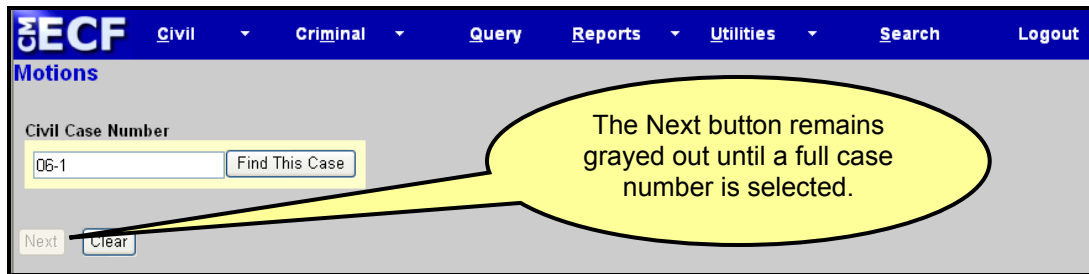
When only a portion of a case number is entered, all possible case number matches will display on the same screen as the initial look-up field.
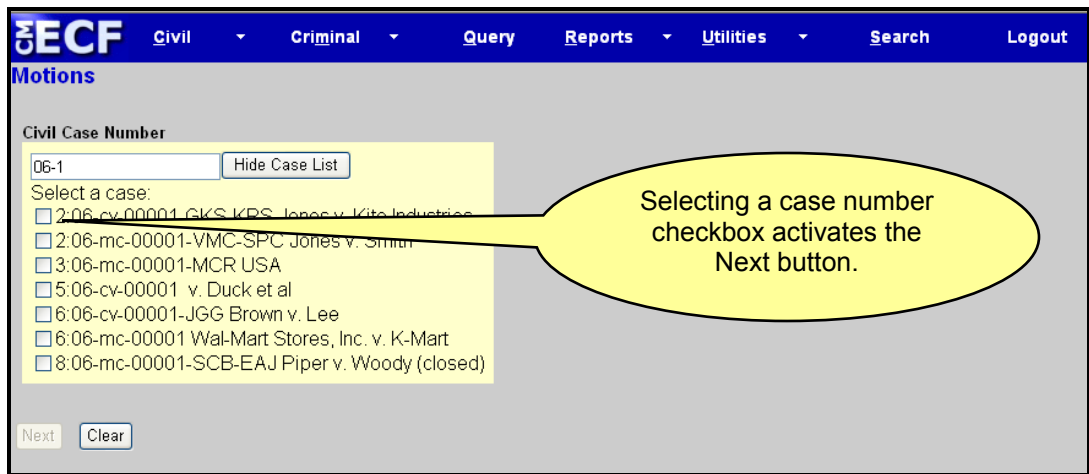
Once the full case number is located, select the proper case number checkbox to continue with docketing.

Cross-Document Hyperlinks

PDF documents filed in CM/ECF can now include hyperlinks to other documents previously filed in:

- the same case,
- another case in the Middle District of Pennsylvania, or
- any other court's CM/ECF system (District, Bankruptcy, or Appellate)

A document may also include hyperlinks to documents being filed in the same docketing transaction. For example, an order may have a hyperlink to an attached form.

Creating Hyperlinks to Previously Filed Documents

**Note:** Users should <u>not</u> copy hyperlinks from NEF's (Notice of Electronic Filing). The document hyperlinks in NEFs contain special information that allows them to provide one "free look" to qualified recipients of the NEF. Instead of copying hyperlinks in NEFs, run a report in CM/ECF, such as the Docket Report, and copy the document number hyperlink from the report.

To copy a hyperlink, right-click over the document number and select **Copy Shortcut** from the menu.
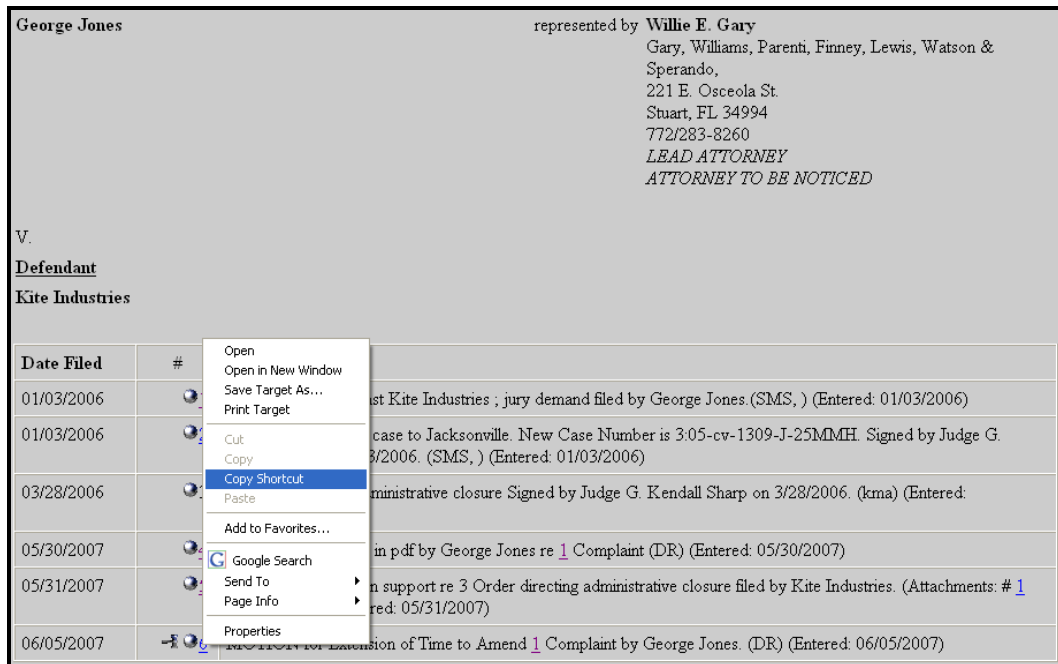
Using WordPerfect to Create Hyperlinks

1. Copy the hyperlink. (Follow the instructions for creating a hyperlink to a previously filed document).

2. In WordPerfect, open the document you want to add the hyperlink to. In the document, highlight the citation text for which you wish to create the hyperlink.

3. Click **Tools**, and select **Hyperlink…** from the menu.

4. Right-click in the *Document/Macro* field, choose Paste from the menu (or Ctrl-v on your keyboard) and click [OK].
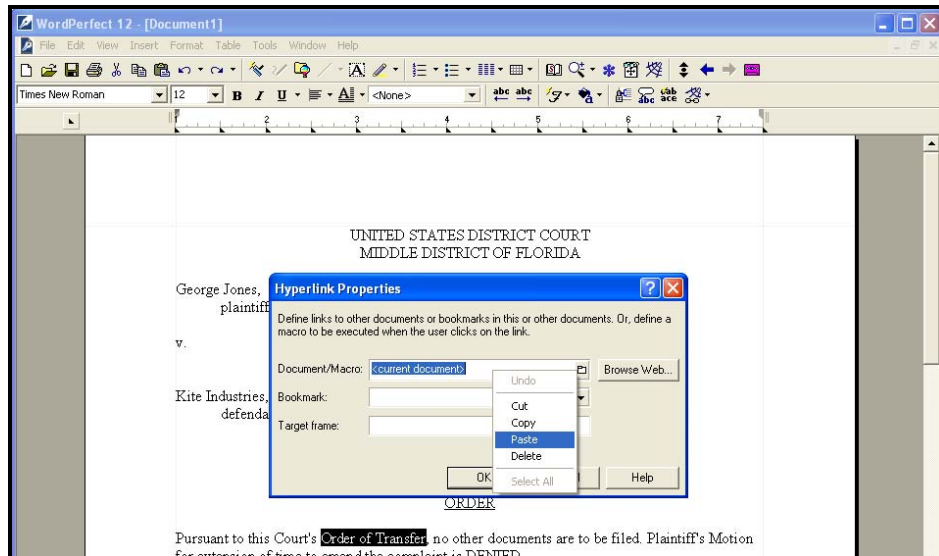
5. The hyperlink text is now underlined indicating a link has been created.

6. Save the document and convert it to PDF using **Files→Publish to PDF.** (Printing to PDF can be used if the document contains no hyperlinks.)

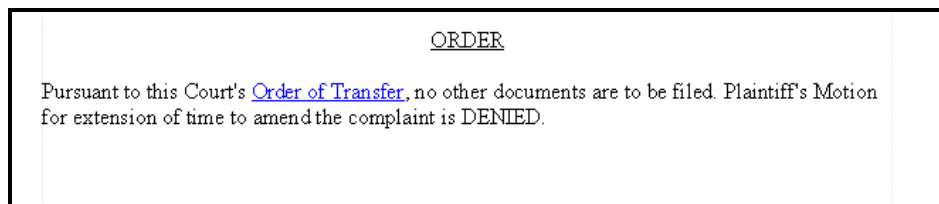7. Docket the event in CM/ECF as usual.

Using Word to Create Hyperlinks

1. Copy the hyperlink. (Follow the instructions for creating a hyperlink to a previously filed document).

2. In Word, open the document you want to add the hyperlink to. In the document, highlight the citation text for which you wish to create the hyperlink.

3. Click **Insert**, and select **Hyperlink…** from the menu.
   Tip: You can also Ctrl-k to insert a hyperlink.

4. Click in the Address field and use the Ctrl-v command to paste the URL. Click [OK].
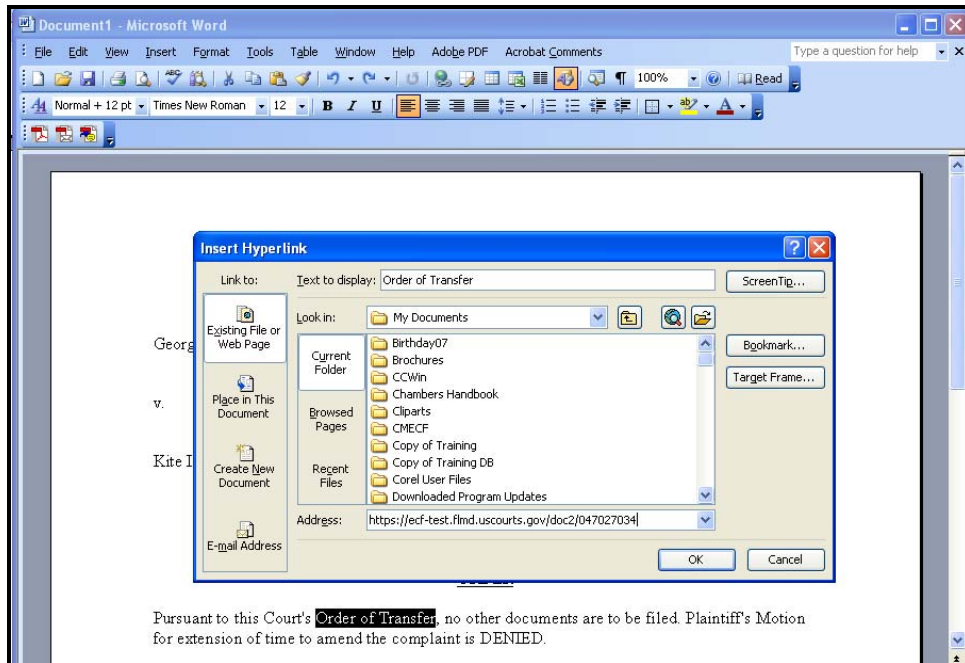
5. Save the document and convert it to PDF by clicking **Adobe PDF** and selecting **Convert to Adobe PDF** from the menu.

   Note: You must have Acrobat PDFMaker installed to convert the document with the hyperlink. (Printing to PDF can be used if the document contains no hyperlinks.)

6. Docket the event in CM/ECF as usual.

Creating Hyperlinks to Documents Filed in the Same Event

You can link two or more documents to be filed in the same event even when those documents where not filed previously in CM/ECF. For example, you can create a hyperlink in a main document to an attachment.

Using WordPerfect

1. Create the secondary document and publish it to PDF. See Step 6 on Page 7.

2. Create/open the main document. This document will have the hyperlink to the secondary document.

3. Select the text in the main document that will be displayed as the hyperlink.

4. Click **Tools**, and select **Hyperlink…** from the menu.
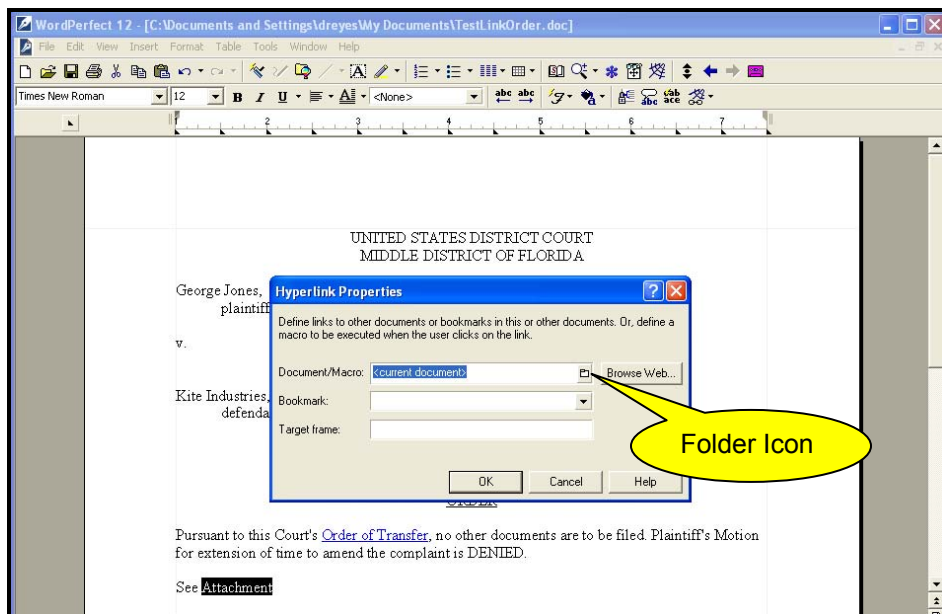
5. Click the *Folder* icon next to the *Document/Macro* field and navigate to find the location of the secondary document. (Note: The file selected as the link must be in **.pdf** format.)
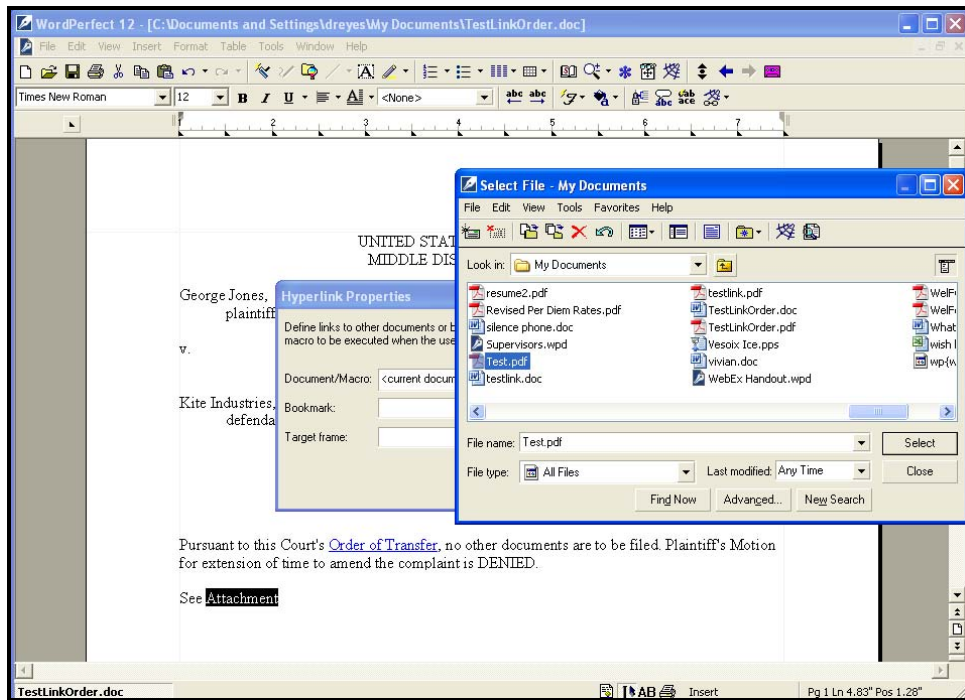
6. Select the file then click [OK] in the Hyperlink Properties box. The hyperlink will be underlined.

7. Save the main WordPerfect document and publish it to PDF. See Step 6 on Page 7.

8. Docket the event in CM/ECF and upload the main document and attachment(s) as usual.

Using Word

1. Create the secondary document and convert it to PDF. See Step 5 on Page 8.

2. Create/open the main document. This document will have the hyperlink to the secondary document.

3. Select the text in the main document that will be displayed as the hyperlink. Click **Insert**, and select **Hyperlink…** from the menu.
   Tip: You can also Ctrl-k to insert a hyperlink.
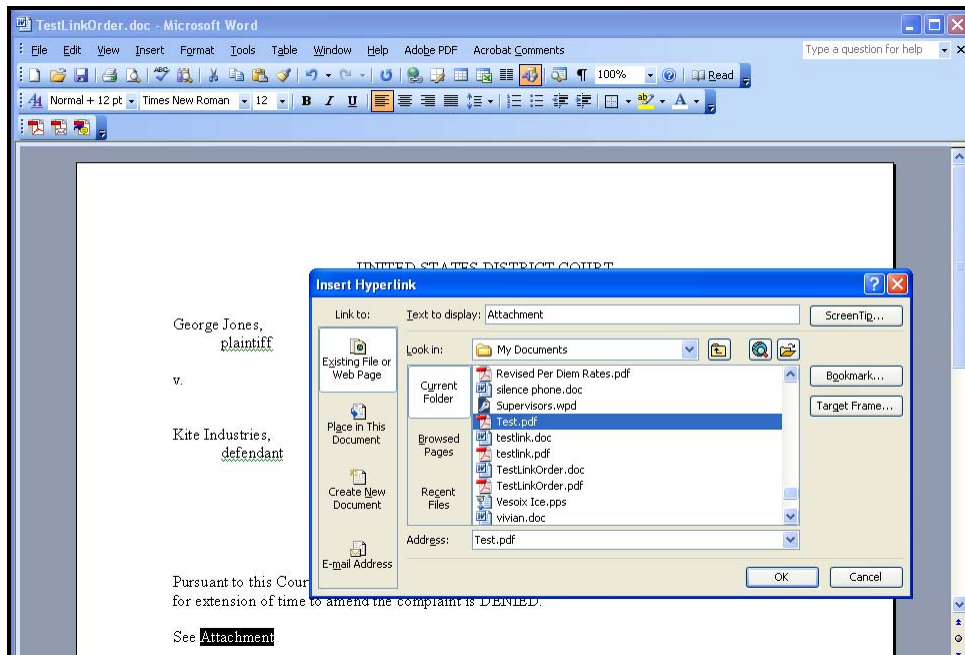
4. Navigate to find the location of the secondary document. (Note: The file selected as the link must be in .pdf format.) Highlight the file. The name of the selected file displays in the Address field. Click [OK].

5. Save the Word document and convert it to PDF. See Step 5 on Page 8.

6. Docket the event in CM/ECF and upload the main document and attachment(s) as usual.

Accessing Documents via Cross-Document Hyperlinks

PDF documents filed in CM/ECF can now include hyperlinks to other documents previously filed in:

- the same case,

- another case in the Middle District of Florida, or

- any other court's CM/ECF system (District, Bankruptcy, or Appellate)

A document may also include hyperlinks to documents being filed in the same docketing transaction. For example, an order may have a hyperlink to an attached form.

As a court user, if the linked document is in our system, accessing documents via a cross-document hyperlink works the same as when documents are accessed via a document number hyperlink in a report or query. If the linked document is on another court's server and is unrestricted, you will be able to access the document after logging in through PACER. Once you do this, you will be able to access documents on other CM/ECF servers until you log out or close the browser window.

For non-court users, a PACER log in screen is presented before the document is displayed. Once they are logged in to a CM/ECF server as a PACER user, they will be able to access documents on other CM/ECF servers for the duration of the browser session or until they log out of CM/ECF.

Social Security Appeal Cases

Beginning on December 1, 2007, PACER users will be allowed remote access to judgments, opinions, and orders that have been marked as written opinions (for purposes of complying with the E-Government Act) in Social Security Appeal cases. Report and Recommendations of Magistrate Judges that have been adopted by orders marked as written opinions also will be available to PACER users.

Requiring a Description When Adding Attachments

When a user adds an attachment to a document filed electronically, the users must either select an attachment category or add a description, or both, before continuing. Previously, an attachment could be added without a description.

Identifying Pro Hac Vice Attorneys

Courts can identify attorneys as pro hac vice by selecting yes for the new Pro Hac Vice on the Person Information screen in the Attorney Admission, Edit Case Participants, Edit Person Data and Maintain User Utilities. If an attorney is flagged as pro hac vice, it will show this on the docket sheet under the attorney's name.

Notice of Electronic Filing

Only case participants and/or their attorneys will receive one free look at documents that are accessed via the NEF. Any attorney who is not active on a case will not receive the one free look. This change was made so

attorneys could not receive a free look at filings in cases that they have marked in their user account as "please notify me in these additional cases".

Adding Corporate Parents During Docketing

Attorneys can now add corporate parents when electronically filing their corporate disclosure statement. Also if a party is added to a case during docketing the following buttons are available on the Party Information screen: Attorney, Alias, Corporate parent or other affiliate, and Review.

Messages on the CM/ECF Main Page

Separate messages can be displayed on the CM/ECF main page for court users, attorneys and PACER users. This allows for specific court messages to be displayed onto to court users.

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

| Date Filed	#	Select all / clear	Docket Text
01/03/2006	1	☐	COMPLAINT against Kite Industries ; jury demand filed by George Jones.(SMS,) (Entered: 01/03/2006)
01/03/2006	2	☐	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	3		ORDER directing administrative closure Signed by Judge G. Kendall Sharp on 3/28/2006. (kma) (Entered: 03/28/2006)
05/30/2007	4	☐	NOTICE testing link in pdf by George Jones re 1 Complaint (DR) (Entered: 05/30/2007)

[View Selected]

or

[Download Selected]

To View

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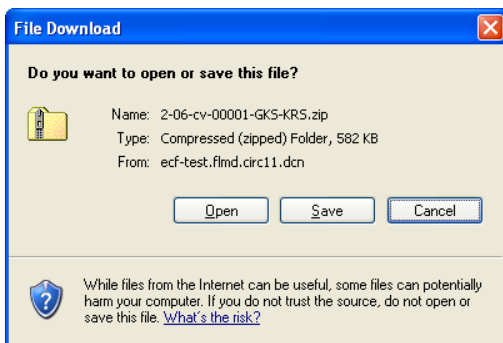
To Download

1. 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.
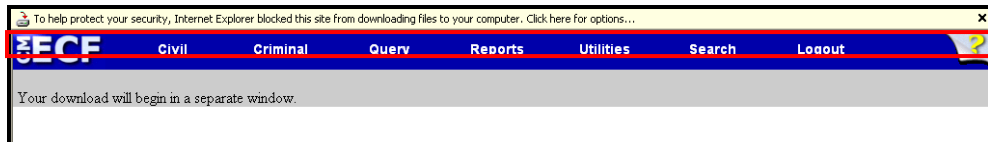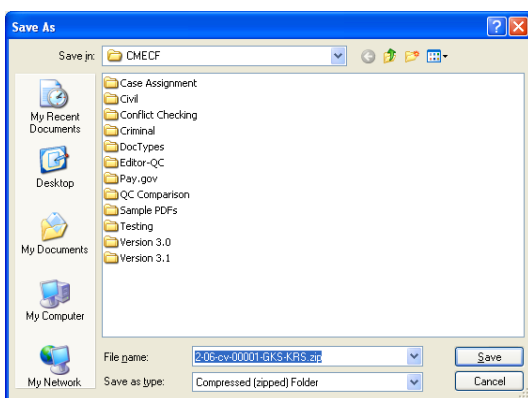
2. If you get this message, click in the yellow area and select *Download File...*

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

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

Viewing all Documents for a Single Docket Entry

You now have the option to View or Download the main document along with the attachments.