

A2 ATTORNEY USERS

A2.1 User Interface Enhancements

All of the user interface enhancements identified in Section A1.1 apply to attorney users, and there are additional user interface changes for attorneys. The case number look-up functionality described in Section A.1.1.2 also applies to docketing. Additionally, there is a new docket event search feature for docketing and a new universal event and menu search.

A2.1.1 Docket Event Search

With the new docket event search functionality, users can enter one or more characters in the docket event search field during docketing to execute more precise searches when selecting event subtypes to docket. If the user enters characters in the text field, the list of events is filtered to display those events that match that character pattern.

The order in which events are added to the *Selected Events* list is the order in which they will be docketed, and the order in which they will appear in the docket text. The mouse or the keyboard can be used to search for and select events.

In Figure A2.1, the user has searched for and selected Disqualify Counsel, Appoint Counsel, and Expedite.

Figure A2.1. Docket Event Search Screen—Status After Searching for and Selecting Three Event Types

The screenshot shows a web interface titled "Motions". At the top, there is a search input field with the placeholder text "Start typing to find another event." Below this, there are two columns of event lists. The left column is titled "Available Events (click to select events)" and contains a scrollable list of event types, with "Expedite" selected. The right column is titled "Selected Events (click to remove events)" and contains a scrollable list of the selected events: "Disqualify Counsel", "Appoint Counsel", and "Expedite". At the bottom of the interface, there are two buttons: "Next" and "Clear".

Available Events (click to select events)	Selected Events (click to remove events)
Disbursement of Funds	Disqualify Counsel
Disclosure	Appoint Counsel
Discovery	Expedite
Dismiss	
Dismiss Case as Frivolous	
Dismiss/Lack of Jurisdiction	
Dismiss/Lack of Prosecution	
Disqualify Counsel	
Disqualify Judge	
Disqualify Juror	
Enforce IRS Summons	
Enforce Judgment	
Entry of Default	
Exparte for miscellaneous relief	
Expedite	

A2.1.2 Universal Event and Menu Search

The new Event and Menu Search utility, labeled **Search**, is available from the main blue menu bar. When clicked, a small pop-up window appears, and the user can enter text to search on. Once the user enters text in the search box and clicks the **Search** button (or Enter on the keyboard) the results are displayed on the screen, with the search string characters highlighted. Each item is a hyperlink to the corresponding menu item or event, so the user can access the menu item or event right from the search results screen. Figure A2.2 shows the **Search** pop-up and the results for a search on 'dis'.

Figure A2.2. Search Events and Menus Pop-up and (partial) Results for a Search on 'dis'



A2.2 Cross-Document Hyperlinks

CM/ECF users now can file a document that includes a hyperlink to a previously filed document(s) in the same case or another case that resides on the CM/ECF system where the filing is being entered, or on any other court's CM/ECF system.

Details about the new functionality:

- The hyperlink, as set by the filer, may link to the start of the document or to a specific page in the document.
- A filer can file a document that includes a hyperlink to a document that is being filed simultaneously (in the same docketing transaction) with the primary document (e.g., a Memo in Support of Summary Judgment may have hyperlinks to the attached documents that are part of the same docketing transaction).
- Immediately after a document is filed in CM/ECF, that document will be available to be linked as a hyperlink in a subsequently filed document.
- A user cannot access a hyperlink to a restricted document unless the user has appropriate permissions.

General assumptions about cross-document hyperlink usage:

- Any document 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.
- The changes for Release 3.1 only pertain to hyperlinks to CM/ECF documents; the ability to file documents with hyperlinks to any external URL (e.g., Westlaw, Lexis) are not affected by the new cross-document hyperlink functionality.
- The CM/ECF application will not verify the validity of URLs included as hyperlinks within documents filed in CM/ECF.
- This functionality has been tested and works properly with Corel WordPerfect 11 or higher and Microsoft Word 2002 or higher. Hyperlinks added to documents created in other word processing programs may not function properly once the documents are converted to PDF format.

A2.2.1 Creating Hyperlinks to Documents Already in the Electronic Case File

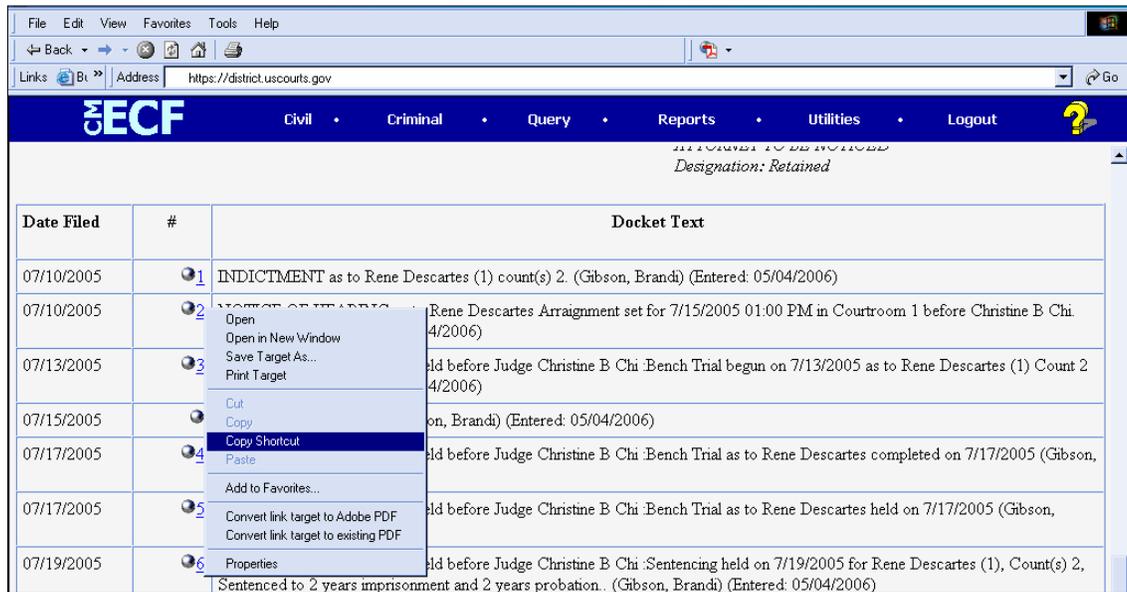
A file can be linked to another document in any database in the federal courts – District (functionality available in Release 3.1), Bankruptcy (functionality available in Release 3.2) and/or Appellate (functionality available as of July 2006). To create a link between a document being filed in CM/ECF and a document that already exists in CM/ECF, follow the steps in Section A2.2.1.1 (for Corel WordPerfect) or Section A2.2.1.2 (for Microsoft Word).

NOTE

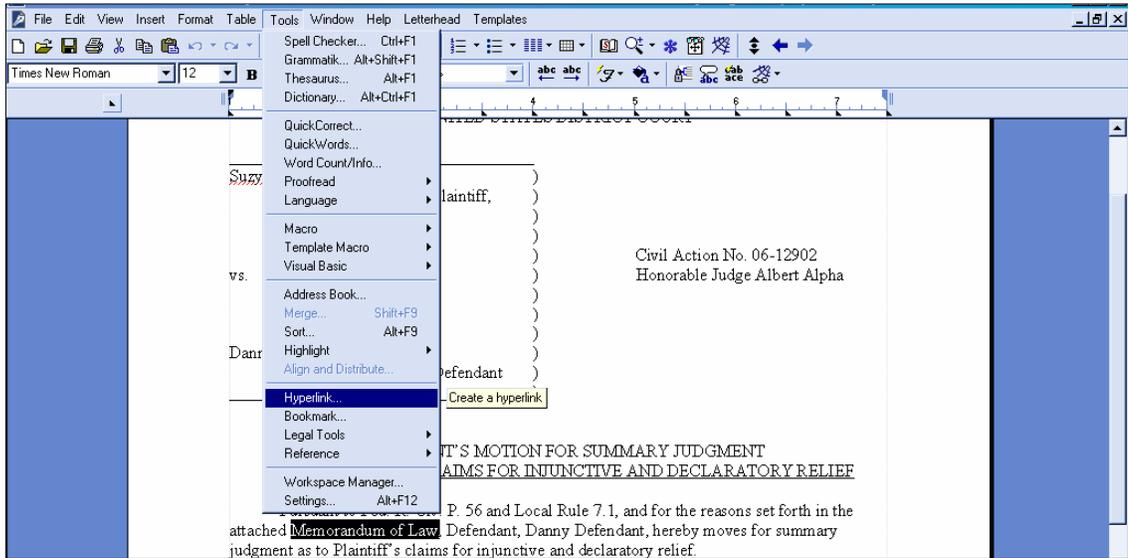
Users should **not** copy hyperlinks from NEFs. The document hyperlinks in NEFs contain special information that allows them to provide one "free look" to qualified recipients of the NEF. Instead of copying hyperlinks in NEFs, users should run a report in CM/ECF, such as the Docket Report, and copy the document number hyperlink from the report. See below for more information on this process.

A.2.2.1.1 Using WordPerfect to Create Hyperlinks to Existing CM/ECF Documents

1. Access CM/ECF and run the docket report for the case that contains the document you want to link to.
2. Locate the document among the docket entries.
3. Copy the URL of the document to the clipboard. To do this, hover over the document link and click the right mouse button. Select **Copy Shortcut** (Internet Explorer/Netscape) or **Copy Link Location** (Firefox) from the selection list. (**Note:** The document link displays after the filed date and is represented by a number with an underscore, e.g. 2).

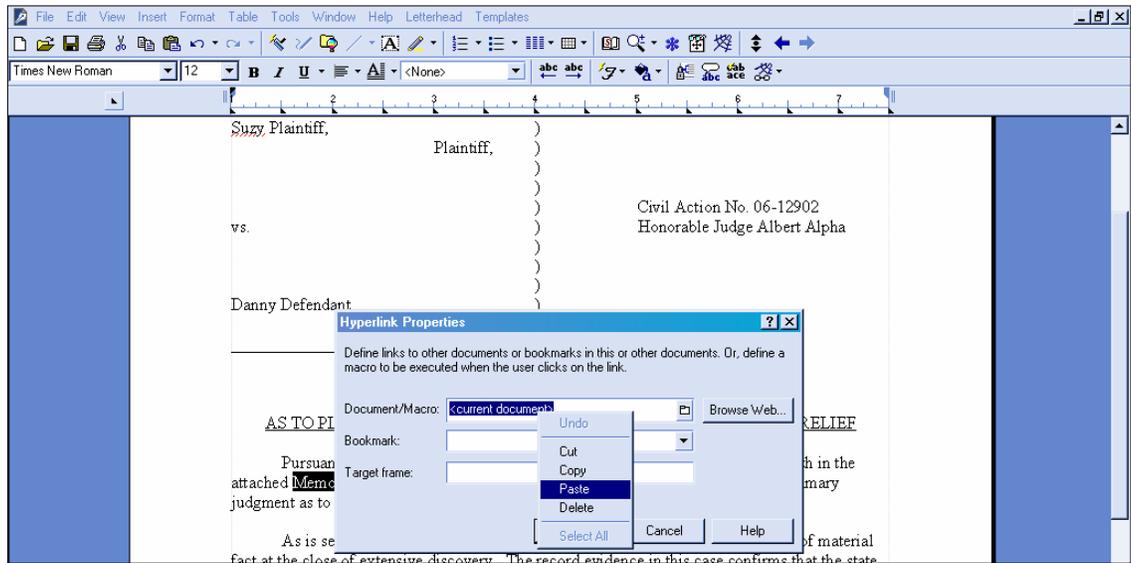


4. In WordPerfect, open the document you want to add the hyperlink to. In the document, highlight the citation text for which you wish to create the hyperlink.
5. Click **Tools** on the toolbar and select **Hyperlink** from the dropdown selection list.

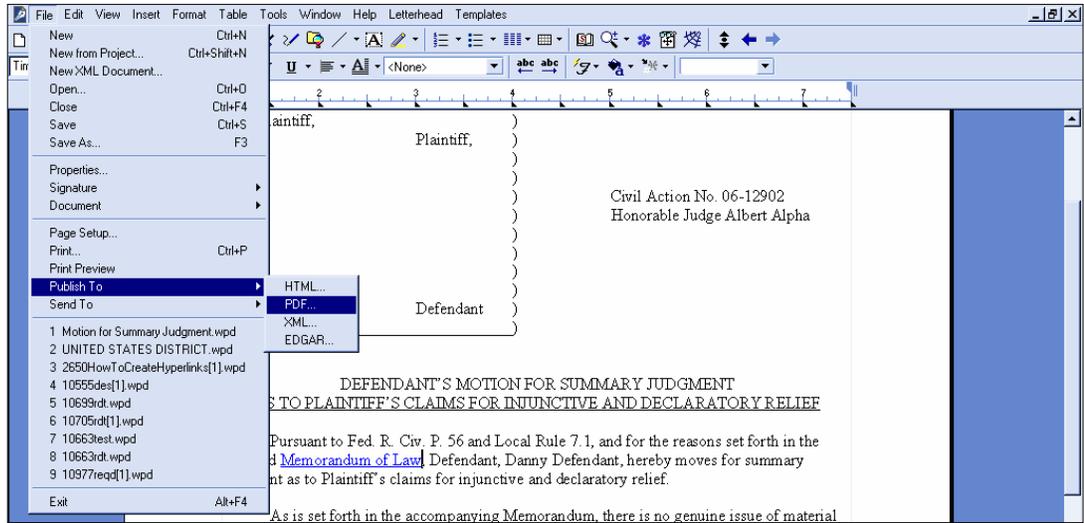


6. The Hyperlink Properties window opens. Paste the URL into the *Document/Macro* field (by clicking the right mouse button and selecting **Paste** or by using the **Ctrl + V** command). (See the screen below.) You can append to the URL a citation to a specific page number within the document, if necessary.

To do this, enter **?page=<page number>** at the end of the URL, for example, <https://usdc.uscourts.gov/doc1/00103032?incHeader=y?page=23>. Click the **OK** button and the dialog box will close. The hyperlink text now is underlined indicating a hyperlink has been created.



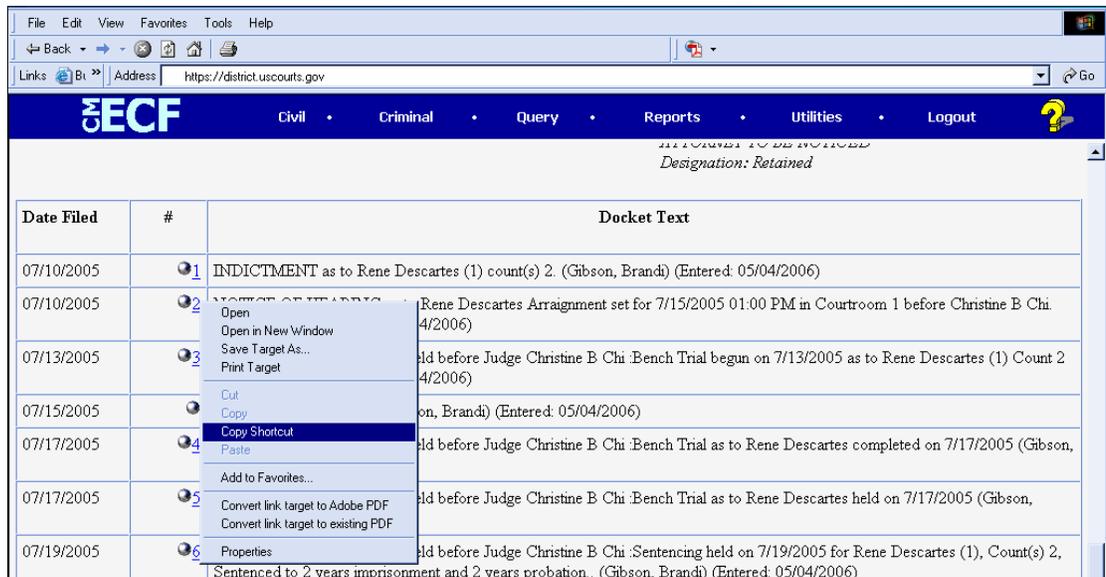
7. Save the word processing document.
8. To convert the WordPerfect document to PDF format, click **File** on the toolbar, select **Publish to** and then **PDF...** from the dropdown selection list or **Publish to PDF** (the selection depends of the version of WordPerfect you are using). Navigate, if necessary, and store the PDF document in a local directory. **Do not print a WordPerfect document to Adobe PDF Writer. You must use Publish to PDF if the document contains a hyperlink.** Printing to PDF is permitted if the document does not contain hyperlinks.



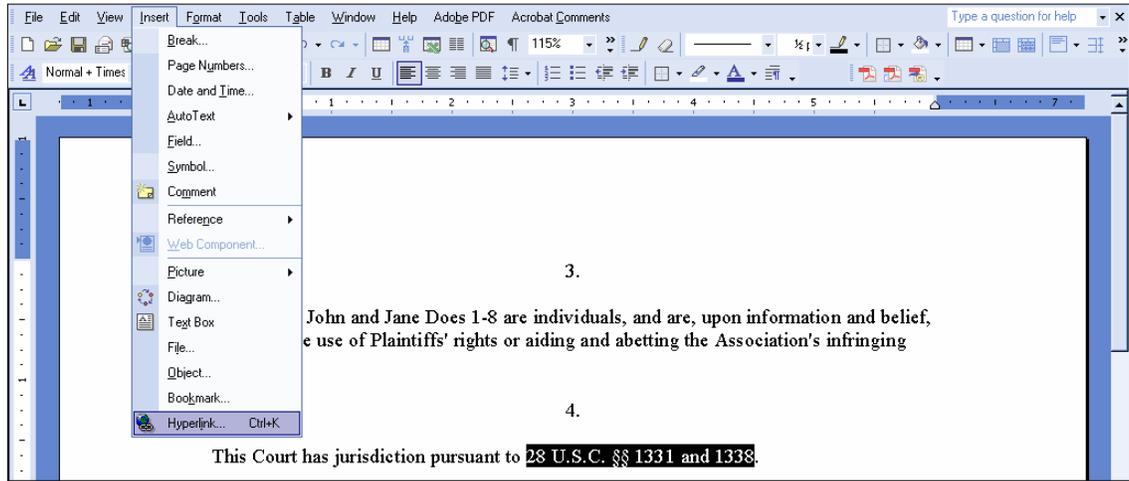
9. Docket an event in CM/ECF and add the PDF to the docket entry as usual.

A.2.2.1.2 Using Microsoft Word to Create Hyperlinks to Existing CM/ECF Documents

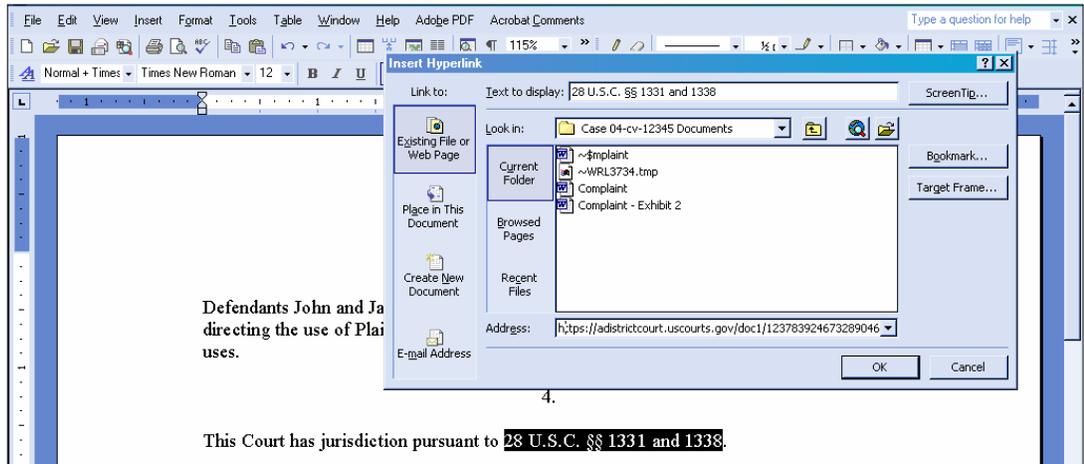
1. Access CM/ECF and run the docket report for the case that contains the document you want to link to.
2. Locate the document among the docket entries.
3. Copy the URL of the document to the clipboard. To do this, hover over the document link and click the right mouse button. Select **Copy Shortcut** (Internet Explorer/Netscape) or **Copy Link Location** (Firefox) from the selection list. (**Note:** The document link displays after the filed date and is represented by a number with an underscore, e.g. 2).



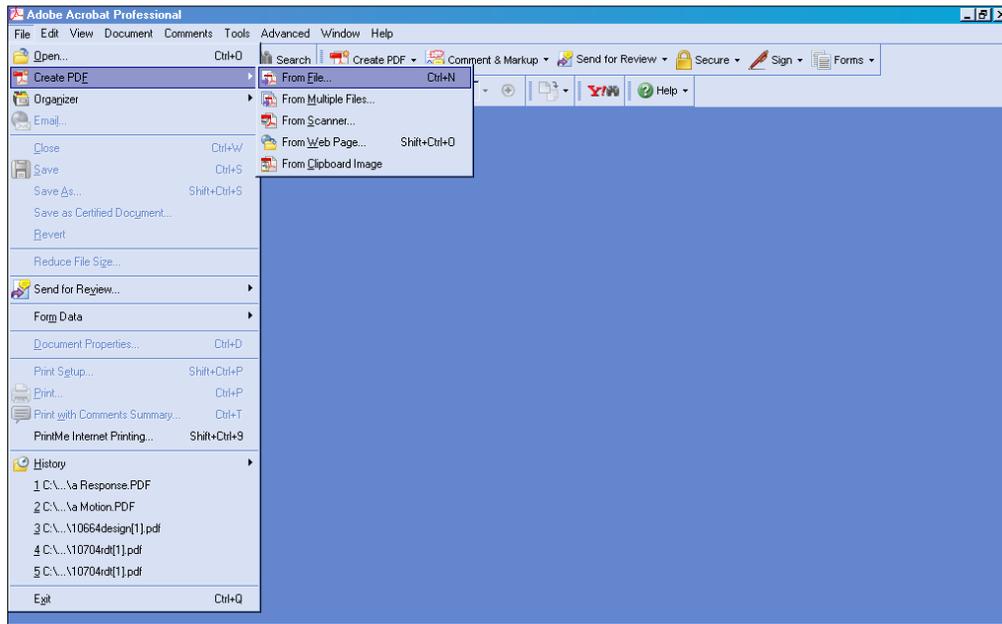
4. In Microsoft Word, open the document you want to add the hyperlink to. In the document, highlight the citation text for which you wish to create the hyperlink.
5. Click **Insert** on the toolbar and select **Hyperlink** from the dropdown selection list.



6. The **Insert Hyperlink** window opens. Paste the URL into the *Address* field (by clicking the right mouse button and selecting **Paste**, or by using the **Ctrl + V** command). The URL of the CM/ECF document is pasted (displays) in the address field. You can append to the URL a citation to a specific page number within the document, if desired. To do this, enter **?page=<page number>** at the end of the URL, for example, <https://ap10-dev-dcn.td.ocads.ao.dcn/doc1/00103032?incHeader=y?page=23>. Click the **OK** button and the dialog box will close. The hyperlink text now is underlined indicating a hyperlink has been created.



7. Save and close the word processing document.
8. **To convert the Word document to PDF format, the Adobe Acrobat application must be used.** There are a number of ways to convert a Word document; the following illustrates conversion from within Adobe Acrobat. (**Note:** If the document is open when the next step is executed an error message is returned. The Word file must be closed before converting it to PDF.)
9. Open the Adobe Acrobat application. Click on **File** in the toolbar and select **Create PDF** and then **From File...**



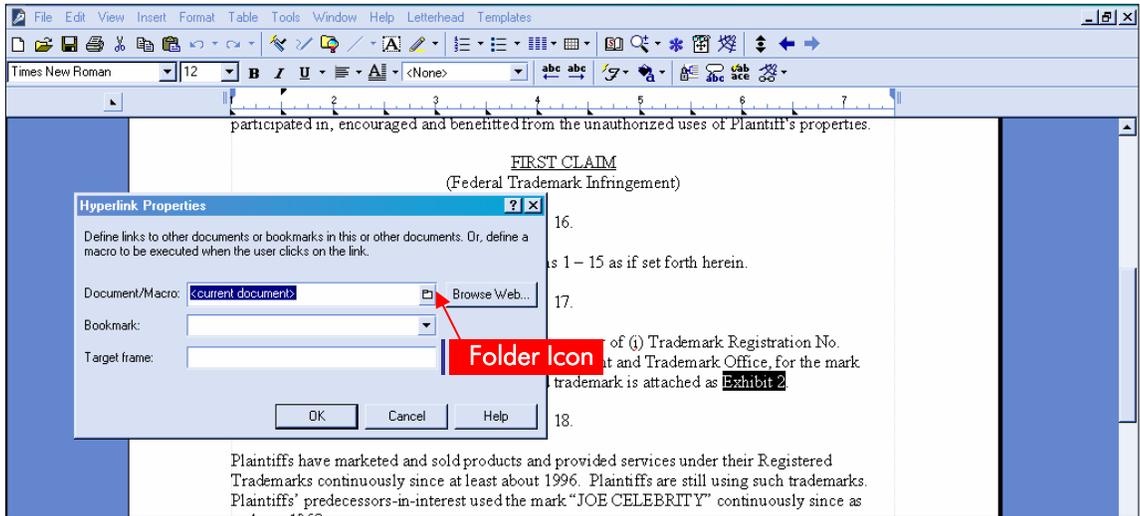
10. A navigation window opens. Navigate, if necessary, to the directory/folder where the Word document is stored. Select the document and click the **Open** button.
11. A series of windows open as the document is converted. When the conversion is completed, the document is displayed in an Adobe Acrobat window. (**Note:** The hyperlink is converted automatically.)
12. Close the Adobe file. Respond **Yes** to the save changes message and store the PDF document in the appropriate directory/file.
13. Docket an event in CM/ECF and upload the PDF file to the docket entry as usual.

A.2.2.2 Creating Hyperlinks between Documents Filed in the Same Event

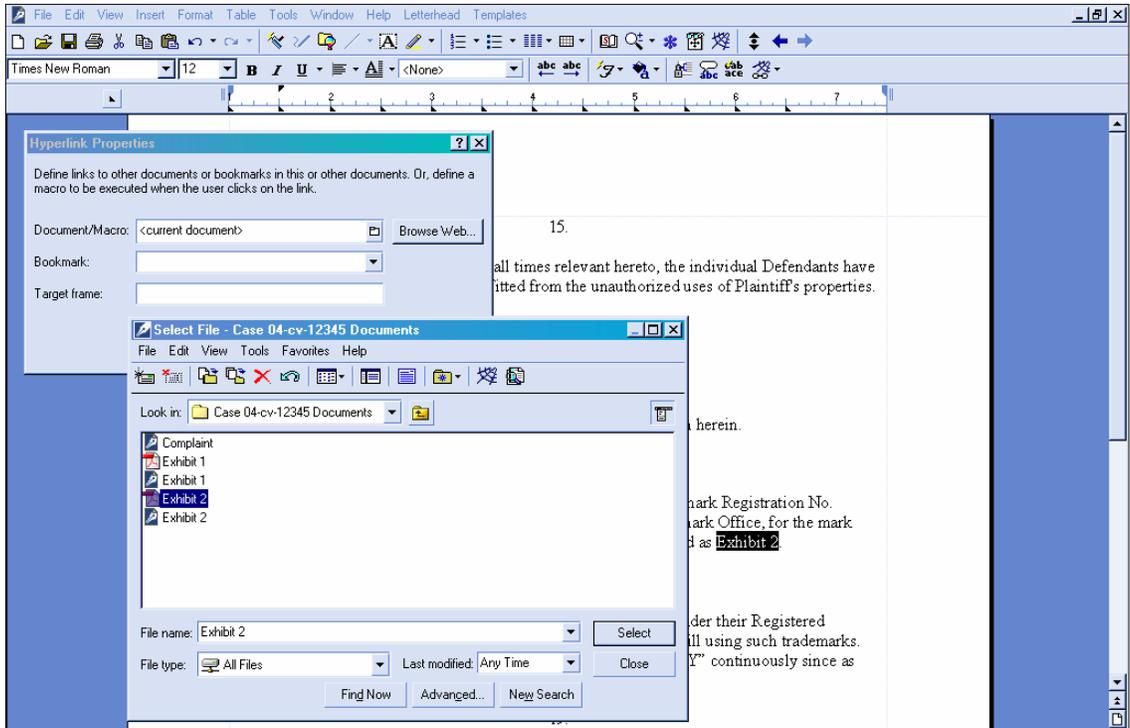
It is possible to link two or more documents to be filed in the same event (e.g., create a hyperlink in the main document to an attachment) even when those documents were not filed previously in CM/ECF. To link documents being filed in the same docket event, follow the instructions in Section A2.2.2.1 (for Corel Word Perfect) or Section A2.2.2.2 (for Microsoft Word).

A2.2.2.1 Using WordPerfect to Create Hyperlinks between Documents Filed in the Same Event

1. Create the secondary WordPerfect document(s) (i.e., the attachment) to which the main document will be linked. Publish the secondary document(s) to PDF. See Step 8 in Section A2.2.1.1 above.
2. Create/open the main document (i.e., the document that will have the hyperlink to the secondary document).
3. Select the text in the main document that will be displayed as the hyperlink. Click **Tools** on the toolbar and select **Hyperlink** from the dropdown selection list. The Hyperlink Properties box is displayed.



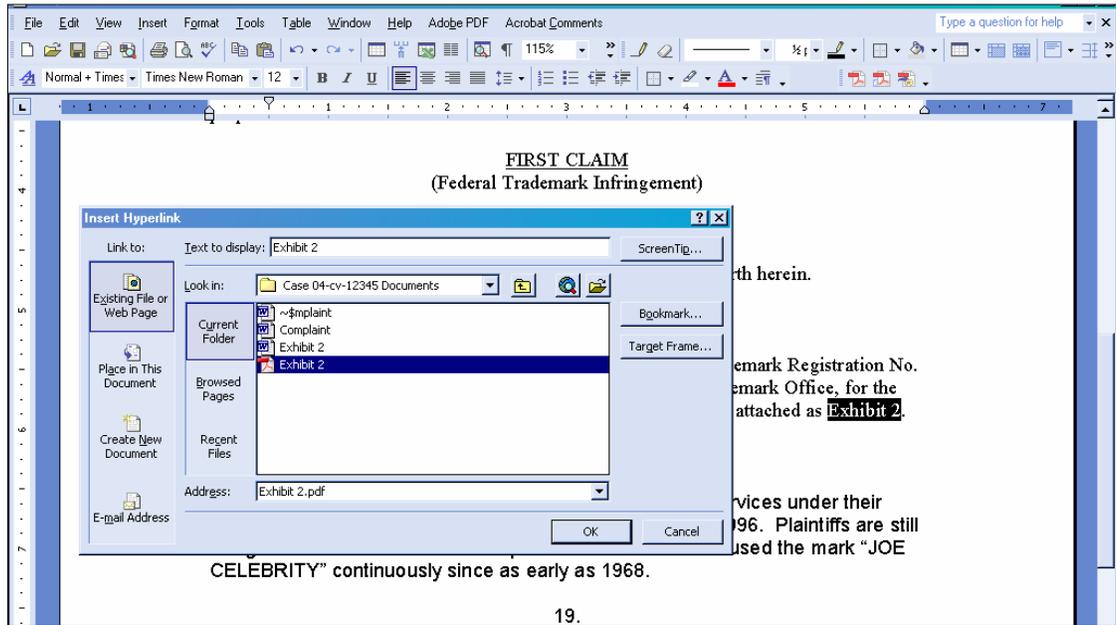
4. Click the *Folder* icon next to the *Document/Macro* field.
5. Navigate to the folder in which the secondary document you wish to link to is located (i.e., the local path name). Highlight the file and click the **Select** button. (**Note:** The file selected as the link must be in **.pdf** format.)



6. You can append to the file name a citation to a specific page number within the document, if desired. To do this, enter **?page=<page number>**, e.g., **Exhibit 2.pdf?page=23**.
7. Click **OK** in the Hyperlink Properties box. The hyperlink text will be underlined.
8. Save the main WordPerfect document. Publish the document to PDF. (See Step 8 in Section A2.2.1.1 above.)
9. Docket an event in CM/ECF and upload the main document and attachments as usual.

A.2.2.2.2 Using Microsoft Word to Create Hyperlinks between Documents Filed in the Same Event

1. Create the secondary Word document(s) (i.e., the attachment) to which the main document will be linked. Publish the secondary document(s) to PDF. See Steps 8-12 in Section A2.2.1.2 above.
2. Create/open the main document (i.e., the document that 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** on the toolbar and select **Hyperlink** from the dropdown selection list.
4. Navigate to the folder in which the secondary document you wish to link to is located. Highlight the file and click the **OK** button. (**Note:** The file selected as the link must be in PDF format.)



5. The name of the selected file displays in the *Address* field. You can append to the file name a citation to a specific page number within the document, if desired. To do this, enter ?page=<page number>, e.g., Exhibit 2.pdf?page=23.
6. Click the **OK** button and the dialog box will close. The hyperlink text will be underlined.
7. Save the Word document. Publish the document to PDF using Adobe Acrobat.
8. Docket an event in CM/ECF and upload the main document and attachments as usual.

A2.2.3 Accessing Documents via Hyperlinks in Other Documents

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 user clicks on a hyperlink to a CM/ECF document but has not logged in to a CM/ECF server, a PACER login screen is presented before the document can be displayed. Once the user has logged in to a CM/ECF server as a PACER user, this login ID will provide access to documents on other CM/ECF servers for the duration of the browser session or until the user logs out of the CM/ECF application. The billing receipt and confirmation will be displayed to users logged in with a PACER account before the document can be displayed.

If a document is restricted for any reason, the user must log in to the server on which the document resides with an attorney login ID and have the appropriate access rights to the document. If a hyperlink to a restricted document is created in a document stored on another server, the hyperlink will not access the document from the other server.

If the user does not have access rights to a document, or a document cannot be found, an applicable message will be displayed.

A2.2.4 PACER Billing Scenarios for Attorneys

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: **"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."**

If a PACER user does not have his/her PACER login already linked to his/her ECF login, he/she will be prompted for the PACER login for the first document he/she tries to view.

A2.3 Notice of Electronic Filing

Beginning with Release 3.1, only case participants will receive one free look at documents that are accessed via the Notice of Electronic Filing. Text on the NEF itself, and on the E-mail Information screen (in [Maintain Your Account](#), [Maintain Your E-mail](#), if the user has access to either of these programs) explains this new functionality. See Section A.1.2 for details about the new text.

A2.4 Docketing

A2.4.1 Displaying Document Paths

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

A2.4.2 Payment of Filing Fees via the Internet - DOES NOT APPLY TO ILSD

A2.4.3 Requiring a Description when Filing Attachments

When a user adds an attachment to a document via docketing, the user must either select an attachment category or enter a description, or both, before continuing.