

APPENDIX: PUBLIC ACCESS CHANGES

A1 All PACER Users

A1.1 User Interface Enhancements

Several user interface enhancements are included in District CM/ECF Release 3.1. The changes affect case number look-ups in reports and queries, and include a new cascading menu system.

A.1.1.1 Cascading Menu System

Much like the Microsoft Windows Start menu, the new cascading menu system allows users to navigate from one CM/ECF menu item to another by hovering over the main blue menu bar and selecting specific menu items from the cascading menus. (The legacy static menu functionality is preserved, and can be accessed with a click on the blue menu bar item.)

Figure A1.1. Sample View of the Utilities Cascading Menu



A.1.1.2 Case Number Look-ups

Almost every screen with a case number look-up field has been modified to reduce the number of screens presented to the user when entering and selecting case numbers. Instead of entering a case number, such as 06-70001, and being presented with several subsequent screens to select the full case number (for example, 9:06-cr-70001), all possible case number matches will be displayed on the same screen as the initial look-up field. Users can select the proper case number and then select other criteria on the screen when running a report or query. With this new functionality, users will be presented with as many as three fewer screens when running reports or queries.

The following figures depict different instances of the same case number look-up screen when running a docket report. Figure A1.2 shows the case number being entered, Figure A1.3 shows the resulting list of cases that appear on the screen after clicking the **Find This Case** button, and Figure A1.4 shows the status of the screen upon selecting two defendants in a criminal case. Notice that the **Next** button is grayed out until at least one case number is selected. Also, notice in Figure A1.4 that the civil case checkbox is grayed out because defendants in the criminal case were selected. The **Run Report** button is grayed out until at least one case is selected.

Figure A1.2. Case Number Look-up Field After Entering a Case Number

Figure A1.3. Case Number Look-up Field After Entering a Case Number and Clicking Find This Case

Docket Sheet

Case number

Select a case:

- 4:06-cr-07001 USA v. Leibnitz et al
 - 4:06-cr-07001-1 Gottfried Wilhelm Leibnitz
 - 4:06-cr-07001-2 Isaac Newton
 - 4:06-cr-07001-3 Rene Descartes
 - 4:06-cr-07001-4 Joe Mercator
 - 4:06-cr-07001-5 John Napier
 - 4:06-cr-07001-6 Leonard Fibonacci
- 4:06-cv-07001 Descartes v. Newton

Filed to

Entered to

Documents to

Include terminated parties Include headers when displaying PDF documents

Include list of parties and counsel View/print multiple documents

Include list of member cases

Output: Unpaginated (html)
 Paginated (pdf)

Sort by

Figure A1.4. Case Number Look-up Field After Selecting at Least One Case

Docket Sheet

Case number

Select a case:

- 4:06-cr-07001 USA v. Leibnitz et al
 - 4:06-cr-07001-1 Gottfried Wilhelm Leibnitz
 - 4:06-cr-07001-2 Isaac Newton
 - 4:06-cr-07001-3 Rene Descartes
 - 4:06-cr-07001-4 Joe Mercator
 - 4:06-cr-07001-5 John Napier
 - 4:06-cr-07001-6 Leonard Fibonacci
- 4:06-cv-07001 Descartes v. Newton

Filed to

Entered to

Documents to

Include terminated parties Include headers when displaying PDF documents

Include list of parties and counsel View/print multiple documents

Include list of member cases

Output: Unpaginated (html)
 Paginated (pdf)

Sort by

For multi-defendant criminal cases, clicking on the + beside the main case number expands the list of cases to display all of the defendants. Once the list of defendants is expanded, clicking on the – beside the main case number collapses the list of defendants so only the main case number is visible.

Users can type in or paste complete case numbers to quickly retrieve the desired case. For criminal cases, a defendant number can be entered, preceded by a hyphen (e.g., 9:06-cr-70001-2). To enter multiple defendants, use commas to separate the defendant numbers (e.g., 9:06-cr-70001-2,3,5).

A1.2 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 (NEF). Text on the NEF explains this new functionality.

New Text on Individual NEFs:

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.

New Text at the Top of the Daily Summary Report:

NOTE TO PUBLIC ACCESS USERS

This Daily Summary Report may contain documents for which one or more of the following policies apply:

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.

There is no charge for viewing opinions.

You will be charged for viewing transcripts according to the total number of pages; the usual 'free look' and 30 page limit do not apply.

New Text on the E-mail Information Screen in Maintain User Accounts/Maintain Your Account/Maintain Your E-mail for a Primary E-mail Address (when the Additional Cases option has been selected):

The 'free look' does not apply when viewing documents in these cases.

New Text on the E-mail Information Screen in Maintain User Accounts/Maintain Your Account/Maintain Your E-mail for Secondary E-mail Address (when the Additional Cases option has been selected):

The 'free look' does not apply when viewing documents in cases for which you are not a participant.

A1.3 Reports

A1.3.1 Calendar Events Report

Users now can choose whether docket text is included in the report output for the Calendar Events Report.

A1.3.2 Civil Cases Report

Users now can run the Civil Cases Report based on jurisdiction code.

A1.3.3 Criminal Cases Report

Users now can run the Criminal Cases Report based on citation code.

A1.3.5 Docket Report

Based on court configuration, party addresses may appear on the Docket Report.

Similar to PDF document headers, configurable headers are available for the new PDF version of the Docket Report. Users now have the option of running the Docket Report in HTML format (unpaginated)

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or PDF format (paginated). If the report is run in PDF format, headers can be added to the report output, based on court preferences.

Several improvements allow users to easily view and print documents and docket sheets. Users can view, print, or download all of the documents for multiple docket entries and view, print, or download the document and all attachments for a single docket entry.

A1.3.5.1 Viewing and/or Downloading All Documents for a Single Docket Entry

Users now can view all of the documents for a single docket entry at the same time*. If the user clicks on a document number hyperlink (e.g., from the Docket Report or the Docket Activity Report), two new buttons appear at the bottom of the Document Selection Menu screen: **View All** and **Download All**.

Figure A1.3.A. Document Selection Menu

Document Selection Menu

Select the document you wish to view.

| Part | Description | |
|-------------------|---------------|---------|
| 1 | Main Document | 1 page |
| 2 | Exhibit | 4 pages |
| 3 | Supplement | 6 pages |
| 4 | Supplement | 2 pages |

or 13 pages

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

Figure A1.3.B. Confirmation Screen (partial) After Clicking View All

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

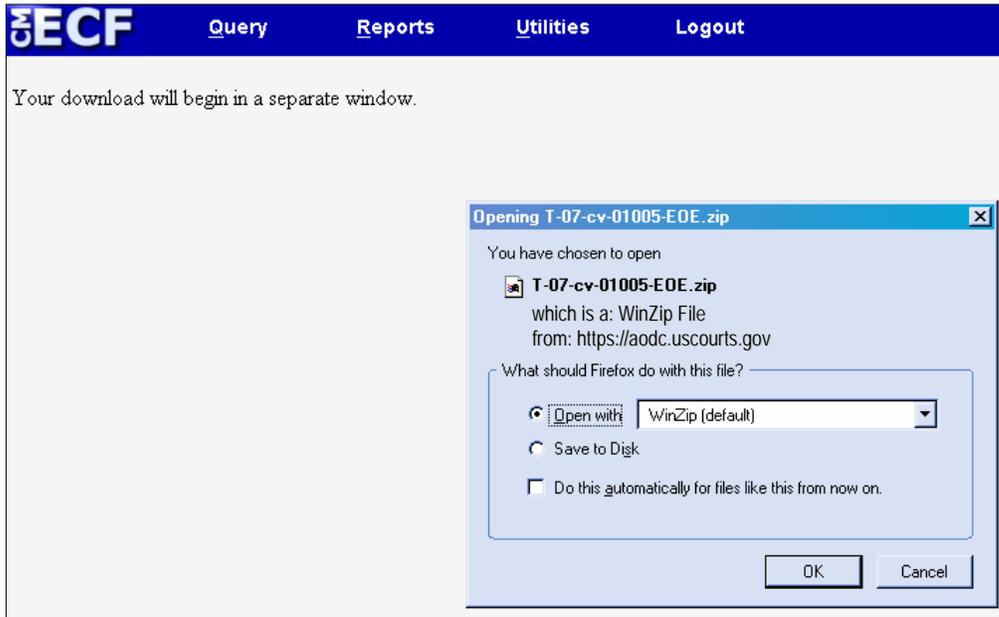
| Pacer Service Center | | | |
|-----------------------------|----------|--------------|-------------------|
| Transaction Receipt | | | |
| Fri Apr 6 11:09:21 EDT 2007 | | | |
| Pacer Login: | | Client Code: | |
| Description: | Image5-0 | Case Number: | T.07-cv-01005-BOE |
| Billable Pages: | 1 | Cost: | 0.08 |

| Pacer Service Center | | | |
|-----------------------------|----------|--------------|-------------------|
| Transaction Receipt | | | |
| Fri Apr 6 11:09:21 EDT 2007 | | | |
| Pacer Login: | | Client Code: | |
| Description: | Image5-1 | Case Number: | T.07-cv-01005-BOE |
| Billable Pages: | 4 | Cost: | 0.32 |

* There is a limit to the size of the file that is created when combining the main document and all of the attachments for the docket entry into one single PDF. This file size limit is listed on the Court Information Report on the Utilities menu. If the size of the combined PDF would exceed this limit, the aggregated file is not created; the user can still view the documents individually. The ability to view and/or download all of the documents for a single docket entry is not available to public terminal users.

If the user clicks **Download All** (on the screen shown in Figure A1.3.A), a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost (similar to the screen shown in Figure A1.3.B). If the user clicks **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 the user to select a destination directory for the ZIP file (the screen is similar to Figure 16.2.C). Once the user selects 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.

Figure A1.3.C. Download Documents Dialogue Box



A1.3.5.2 Viewing and/or Downloading All Documents for Multiple Docket Entries

Users now can view and print all of the documents for multiple docket entries at the same time by clicking the new *View multiple documents* checkbox on the Docket Report selection criteria screen. If the user submits the screen with the *View multiple documents* option selected, the Docket Report output will be in HTML format and will include a new column between the document number column and the docket text column, labeled *Select*. For each docket entry with a document, a checkbox appears in the *Select* column. The user can select the docket entries for which the documents should be combined into a single PDF.

Figure A1.3.D. Bottom Portion of Docket Sheet for the View Multiple Documents Option

| Date Filed | # | Select | Docket Text |
|------------|-------------------|-------------------------------------|--|
| 03/07/2007 | 1 | <input checked="" type="checkbox"/> | COMPLAINT against Pierre de Fermat (Filing fee \$ 350.), filed by Blaise Pascal. (Descartes, Rene) (Entered: 03/07/2007) |
| 03/12/2007 | 2 | <input type="checkbox"/> | MOTION for Disclosure by Blaise Pascal. Motions referred to Emily O Eleven. (Descartes, Rene) (Entered: 03/12/2007) |
| 03/21/2007 | 3 | <input type="checkbox"/> | AFFIDAVIT of Service for Complaint served on Pierre de Fermat on 3/12/07, filed by Blaise Pascal. (Descartes, Rene) (Entered: 03/21/2007) |
| 03/21/2007 | 4 | <input type="checkbox"/> | ANSWER to 1 Complaint by Pierre de Fermat. (Kepler, Johannes) (Entered: 03/21/2007) |
| 03/21/2007 | 5 | <input checked="" type="checkbox"/> | MOTION to Dismiss by Pierre de Fermat. Motions referred to Emily O Eleven. Responses due by 4/4/2007 (Attachments: # 1 Exhibit # 2 Supplement # 3 Supplement) (Kepler, Johannes) (Entered: 03/21/2007) |
| 03/28/2007 | | | Judge Zachary G Zeta no longer assigned to case. (BCG) (Entered: 03/28/2007) |
| 04/06/2007 | | | Judge Oliver A Omega added. (BCG) (Entered: 04/06/2007) |

View Selected
or
Download Selected

* The ability to view and/or download all of the documents for multiple docket entries is not available to public terminal users.

Two buttons appear at the end of the Docket Report: **View Selected** and **Download Selected**. If the user clicks **View Selected**, a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. The screen is similar to Figure A1.3.B, above. If the user clicks **View Document** on the confirmation screen, the selected documents (and all attachments) are combined into a single PDF and displayed on the screen. The user may print the documents from the screen.

If the user clicks **Download Selected**, a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. The screen is similar to Figure A1.3.B, above. If the user clicks **Download Documents** on the confirmation screen, the selected documents (including all attachments) are combined in a ZIP file and a dialogue box is displayed for the user to select a destination directory for the ZIP file (similar to Figure A1.3.C, above). Once the user selects 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.