

# **CM/ECF Version 4.1**

## **A Guide to the New Features Available to Attorneys and Law Firm Staff**



United States District Court, Northern District of Ohio  
December 2, 2009  
CM/ECF Version 4.1

# TABLE OF CONTENTS

Creating an Appendix with Document Links .....	1
Creating an Appendix with the <i>Include documents in Appendix Option</i> .....	2
Creating an Appendix with the <i>Include document hyperlinks in Appendix Option</i> .....	2
Document Pagination.....	3
Document Pagination Formatting.....	3
Searching for a Document or Page ID .....	4
Printing Multiple Documents .....	5

# Version 4.1 Enhancements & Changes

## CREATING AN APPENDIX WITH DOCUMENT LINKS

With the previous *Create Appendix* functionality, attorneys could select a sub-set of the docket entries for a district case and the software created a PDF version of the docket sheet with the selected PDF documents appended. This process can create PDF files with very large file sizes.

A new set of radio button options labeled *Include documents in Appendix* and *Include document hyperlinks in Appendix* has been added to the bottom of the Docket Report when it is run with the *Create Appendix* option selected. These new options allow users to indicate if the PDF documents they selected for inclusion in the appendix docket sheet should be appended to the docket sheet or if hyperlinks to those documents should be included instead.

When the Docket Report is run with the *Create Appendix* option selected, two new radio buttons are included at the bottom of the report: *Include documents in Appendix* and *Include document hyperlinks in Appendix*.

### New Radio Buttons on Docket Report in Create Appendix Mode

U.S. District Court Administrative Office of the US Courts (td8d) (Alexandria) CIVIL DOCKET FOR CASE #: <a href="#">1:09-cv-07780-ZGZ-FBF</a>				
Pythagoras v. Pascal Assigned to: Zachary G Zeta, IV Referred to: Filip B Fifteen Cause: No Cause Code Entered	Date Filed: 03/16/2009 Jury Demand: None Nature of Suit: 130 Miller Act Jurisdiction: Federal Question			
<b>Plaintiff</b> Sam Pythagoras	represented by <b>Leonardo Fibonacci</b> 11235813 Sequence Street Suite 2144 Washington, DC 20002 Email: <a href="mailto:brandi.gibson_ao.uscourts.gov@example.com">brandi.gibson_ao.uscourts.gov@example.com</a> ATTORNEY TO BE NOTICED			
V.				
<b>Defendant</b> Blaise Pascal	represented by <b>Galileo Galilei</b> Galilei & Galilei, Inc. 9876 Stars Street Galaxy, VA 22221 Email: <a href="mailto:galileo_example.com@example.com">galileo_example.com@example.com</a> ATTORNEY TO BE NOTICED			
Date Filed	#	clear	Sort Order	Docket Text
03/16/2009	<input checked="" type="radio"/> 1	<input type="checkbox"/>	<input type="text"/>	COMPLAINT against Blaise Pascal, filed by Sam Pythagoras. (Attachments: # <a href="#">1</a> Affidavit, # <a href="#">2</a> Appendix) (Gibson, Brandi) (Entered: 03/26/2009)
03/16/2009	<input checked="" type="radio"/> 2	<input type="checkbox"/>	<input type="text"/>	MOTION to Dismiss by Blaise Pascal Responses due by 4/10/2009 (Gibson, Brandi) Modified on 3/26/2009 (Gibson, Brandi). (Entered: 03/26/2009)
Footer format: <input type="text" value="USCA8 Page &lt;pagenum&gt;"/> <input checked="" type="radio"/> Include full docket sheet <input checked="" type="radio"/> Include documents in Appendix (Numbers, letters, spaces, and <pagenum> only) <input type="radio"/> Include abridged docket sheet <input type="radio"/> Include document hyperlinks in Appendix				
<input type="button" value="View Selected"/>				
or				
<input type="button" value="Download Selected"/>				
or				
<input type="button" value="Print Selected"/> <input type="button" value="Please Select"/>				

### **Creating an Appendix with the Option *Include Documents in Appendix***

If the *Include documents in Appendix* option is selected when the appendix is generated, the application produces a PDF version of the docket sheet with the selected documents appended.

### **Creating an Appendix with the Option *Include Document Hyperlinks in Appendix***

If the *Include document hyperlinks in Appendix* option is selected when the appendix is generated, the application produces a PDF version of the docket sheet that does not include the documents from the case record. Instead, this PDF includes document hyperlinks which direct the user clicking on them back to the district court's CM/ECF application to view the document(s) (see figure 2.1.2.A).

For PACER billing purposes, this report bills in a similar fashion to the previous appendix function already available to attorney users.

When a user (in Create Appendix mode) logged in via the inside server wants to click on any document number hyperlink from within the generated PDF version of the appendix, the user must ensure that his/her default browser is the same as the one that he/she is logged in to CM/ECF with; otherwise the user will need to log in again after clicking on any of the document number hyperlinks in the PDF version of the appendix.

#### **Appendix PDF with Document Hyperlinks**

U.S. District Court Administrative Office of the US Courts (td8d) (Alexandria) CIVIL DOCKET FOR CASE #: <u>1:09-cv-07780-ZGZ-FBF</u>		
Pythagoras v. Pascal Assigned to: Zachary G Zeta, IV Referred to: Filip B Fifteen Cause: No Cause Code Entered		Date Filed: 03/16/2009 Jury Demand: None Nature of Suit: 130 Miller Act Jurisdiction: Federal Question
<b><u>Plaintiff</u></b>		
Sam Pythagoras	represented by	Leonardo Fibonacci 11235813 Sequence Street Suite 2144 Washington, DC 20002 Email: <a href="mailto:brandi_gibson_ao.uscourts.gov@example.com">brandi_gibson_ao.uscourts.gov@example.com</a> <b>ATTORNEY TO BE NOTICED</b>
V.		
<b><u>Defendant</u></b>		
Blaise Pascal	represented by	Galileo Galilei Galilei &Galilei, Inc. 9876 Stars Street Galaxy, VA 22221 Email: <a href="mailto:galileo_example.com@example.com">galileo_example.com@example.com</a> <b>ATTORNEY TO BE NOTICED</b>
Date Filed	#	Docket Text
03/16/2009	<u>1</u>	COMPLAINT against Blaise Pascal, filed by Sam Pythagoras. (Attachments: # <u>1</u> Affidavit, # <u>2</u> Appendix) (Gibson, Brandi) (Entered: 03/26/2009)
03/16/2009	<u>2</u>	MOTION to Dismiss by Blaise Pascal Responses due by 4/10/2009 (Gibson, Brandi) Modified on 3/26/2009 (Gibson, Brandi). (Entered: 03/26/2009)

## DOCUMENT PAGINATION

A new sequential pagination feature has been developed in CM/ECF to provide a unique page number for every page of each document in a case. This page number is sequenced in the order in which the document is filed in a case. If a user prints a set of documents, each page of the selected documents will display the same unique page number each time it is printed or viewed.

Through this new sequential pagination feature, permanent sequential page numbers are available to public and court users, so anyone accessing a document from the district court docket is assured of always referencing the same page.

### **Document Pagination Formatting**

The new sequential pagination is in addition to:

- existing individual document pagination supplied by the document author,
- the pagination created by the PDF Header functionality in CM/ECF, and
- the pagination within the PDF document generated when a record on appeal or appendix is produced.

The PDF header can be configured to exclude or include the new document pagination tag.

Each page of multiple documents attached to a single docket entry will have a unique sequential page number in the order in which a document is attached. For example: if three documents are filed in a single docket entry, and these are the first documents in the case, the sequential pagination will be:

Document	Number of Pages	Sequential Page Number
1	3	1, 2, 3
2	5	4, 5, 6, 7, 8
3	2	9, 10

If the second document is deleted and a new document with three pages is added to the docket entry, a gap will be created in the numbering and the sequential pagination will be:

Document	Number of Pages	Sequential Page Number
1	3	1, 2, 3
3	2	9, 10
4	3	11, 12, 13

If the third document is replaced by a new document with four pages, then the sequential pagination will be:

Document	Number of Pages	Sequential Page Number
1	3	1, 2, 3
3	4	14, 15, 16, 17
4	3	11, 12, 13

### Searching for a Document or Page ID

The selection criteria screen for the Docket Report now contains two new fields so the user can go directly to a document or a specific page ID in a case. The user must first enter a case number, and then a document number or page ID number can be entered in the corresponding field. Upon running the report, the specified document will be opened if a document number was entered, and if a page ID was entered, the document containing that page ID will be opened, with the focus on the indicated page. This same functionality has been added to the Search for a Document query on the Query menu.

#### *Docket Report Selection Criteria Screen*

**Docket Sheet**

Case number

Filed  to

Entered  to

Documents  to

Go to Document  or PageID

**Include:**

- Parties and counsel
- Terminated parties
- List of member cases
- Restricted entries
- Sealed entries
- Links to Notices of Electronic Filing

**Document options:**

- Include headers when displaying PDF documents
- View multiple documents
- Create Record on Appeal
- Create Appendix

**Abridged docket report:**

- Create abridged docket report

**Format:**

- HTML (unpaginated)
- PDF (paginated)

Sort by:

Make these options my default. Schedule this to run

## PRINTING MULTIPLE DOCUMENTS

Previously, the *View Multiple Documents* and the *Create Record on Appeal (ROA)* feature on the docket sheet selection screen allowed users to select multiple documents from the Docket Report and then view the selected documents in one combined PDF. Depending on the number and size of documents selected, it could take several minutes to format and view the combined PDF in Adobe for a document that is ultimately going to be printed.

A new print option allows the user to send the selected documents directly to the printer using the new **Print Selected** button. The printing of the documents is done in a background process directly from the server, without requiring the user to view the documents first or wait for the documents to be assembled.

The new **Print Selected** button and a drop down list of printers are displayed at the bottom of the Docket Report (in *View Multiple Documents* or in *Create Record on Appeal* mode), so that the user can select the desired printer and print the resulting PDF document(s) to that printer.

### Bottom of Docket Report (ROA mode)

Footer format:   
(Numbers, letters, spaces, and <pagenum> only)

Include full docket sheet  
 Include abridged docket sheet  
 Include documents only

Total number of pages in selected documents :

or

or

Once the documents are selected, the user can choose whether or not the printed output includes:

- documents and the docket report – by selecting *Include full docket sheet*
- documents and the document summary – by selecting *Include abridged docket sheet*, or
- documents only – by selecting *Include documents only*.

The number of pages that will be in the printed output is displayed in the *Total number of pages in selected documents* box. The user then runs the report by clicking the *Print Selected* button, and a confirmation page will be displayed immediately. An email will be sent to the user once the PDF is successfully submitted to the printer.