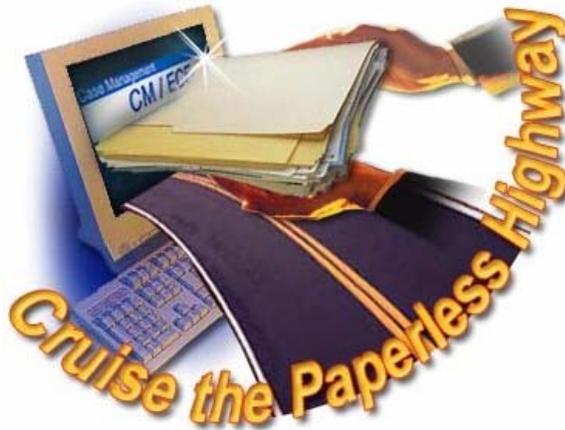


CM/ECF Version 4.0.3

New Features for Attorney Users



USDC, Middle District of Florida

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ENHANCEMENTS AFFECTING ATTORNEY USERS

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RSS (Really Simple Syndication Feed for Public Users)

Really Simple Syndication (RSS) is a type of XML that allows Internet browsers and other feed readers to display information from a website. Users can subscribe to RSS feeds so they will be notified every time content is updated on a particular site.

To allow for easier public access to specific data, CM/ECF, at the option of the court, now provides users with an RSS feed for notification with links to docket sheets and documents.

Case-specific RSS feeds will not be included. Instead, the feeds will be based on event types.

A standard RSS reader will not be provided with CM/ECF. Users must acquire, install, and configure third-party RSS reader software before they can use this feature in CM/ECF.

The Court Information report will include the RSS feed available to public users, if allowed by the court.

Public users get an “all or nothing” RSS feed based on the events the court allows to be included in the feed. The feed includes the last 100 entries of the court-defined event types that have been docketed.

If the user selects the Last 100 entries – Internet option, a subsequent screen appears; the user can subscribe to the fee from this screen. A sample list of recent docket entries also appears on this screen.

Court Information	
	Court Details
Court's Name	Administrative Office of the US Courts (pd4d)
Software Version	CM/ECF-DC V4.0
ECF Go Live Date	01/01/2002
Maximum PDF File Size	15 MB
Maximum Merge Document Size	20 MB
RSS Feed	 Last 100 entries - Internet
Docket entries of type: motion	

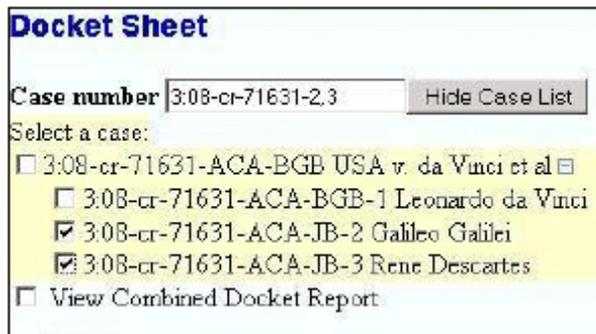
Avoiding Login Prompts When Clicking on Links within the RSS Reader

Users can avoid being prompted for a login every time they click on a case number or document link by staying logged in to CM/ECF with the default browser used by the RSS reader. The first time the user accesses a feed using an RSS reader (for example, FeedDemon), the user should

configure the reader as follows: select the Tools menu, then Options, then Browsing. Check the box for Open external links in default browser instead of inside FeedDemon. Apply the changes. By doing this it will ensure that the user does not have to log in to CM/ECF after clicking on a case number or a document number hyperlink from the feed.

Docket Report

When selecting 'Reports' in the blue menu bar, users now can run a combined Docket Sheet for a subset of criminal defendants in a multi-defendant case. A new View Combined Docket Report checkbox will be displayed beneath the case number list when a case number for a multi-defendant criminal case has been entered and two or more of the criminal defendant cases have been selected. Selecting the View Combined Docket Report checkbox allows the user to run the combined form of the report for the chosen subset of defendants.



Docket Sheet

Case number:

Select a case:

- 3:08-cr-71631-ACA-BGB USA v. da Vinci et al
- 3:08-cr-71631-ACA-BGB-1 Leonardo da Vinci
- 3:08-cr-71631-ACA-JB-2 Galileo Galilei
- 3:08-cr-71631-ACA-JB-3 Rene Descartes
- View Combined Docket Report

The combined Docket Report displays all of the defendant, party, and attorney information in the top section of the report for those defendants selected. The combined proceedings of the chosen defendants are displayed in the bottom section of the report.

Query

The Query screen was modified to provide more options to allow for more refined searching.

The Query screen was modified as follows:

- The party name search fields were combined with the case data search fields to form a single section.
- A *Cause of Action* select list was added.

- The redundant row of *Case status* radio buttons was removed.
- The second instance of the *or search by* text was removed.

Queries now can be run by entering a case number or any combination of the followings:

- Case Status
- Filed Date
- Last Entry Date
- Nature of Suit
- Cause of Action
- Last/Business Name
- First Name
- Middle Name
- Type

Query

Search Clues

Case Number

or search by

Case Status: Open Closed All

Filed Date to

Last Entry Date to

Nature of Suit

Cause of Action

Last/Business Name (Examples: Desoto, Des*t)

First Name Middle Name

Type

Redaction Message

The following text was added to the log in screen to remind users of the need to redact certain information. The user will be required to check a checkbox located next to this message before continuing.

- I **IMPORTANT:** All filings with the court – including attachments – must comply with Fed. R. Civ. P. 5.2 or Fed. R. Crim. P. 49.1: Social Security or taxpayer-identification numbers; dates of birth; names of minor children; financial account numbers; and home addresses in criminal cases, may **not** appear, except as allowed by the applicable rule.

Attorney Users – Adding Documents and Attachments

The process of adding a main document and attachments during docketing has been streamlined to only require one screen, shown below in its initial state. The document upload screen changes dynamically based on the number of attachments added, and other actions taken by the user.

Attachments	Category	Description
<input type="text"/> Browse...	<input type="text"/>	<input type="text"/>

When the user clicks the **Browse** button, in the *Attachments* section to add the first attachment, then selects a PDF document, selects a category, or enters a description (or both), a new row will appear so the user can then add a second attachment, and so on.

Motions
[7:08-cv-00001-FJF Foley v. Davis](#)

Select the pdf document and any attachments.

Main Document
 C:\Documents and Settings\gibson\Des

	Attachments	Category	Description	
1.	C:\Documents and Settings\gibson\Des <input type="button" value="Browse..."/>	Affidavit <input type="button" value="v"/>	<input type="text"/>	<input type="button" value="Remove"/>
2.	C:\Documents and Settings\gibson\Des <input type="button" value="Browse..."/>	<input type="button" value="v"/>	Exhibit A	<input type="button" value="Remove"/>
3.	<input type="text"/> <input type="button" value="Browse..."/>	<input type="button" value="v"/>	<input type="text"/>	

If only two attachments should be added, the user should leave the fields in the third row blank and then click **Next**. If additional attachments should be added, the user should click **Browse** for each attachment and then add the document.

If an attachment should be removed, the user should click **Remove**. If, for example, Attachment 1 is removed and there is a second attachment, Attachment 2 would be Attachment 1, etc.

If an attachment file is incorrect and needs to be replaced, the user should click **Browse** again for the attachment and load a different document.

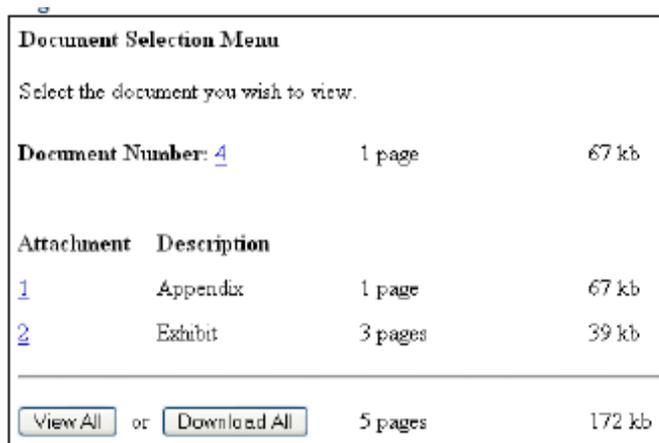
The default state for the document upload screen is shown in the figure above. If the user clicks the **Clear** button after adding documents and attachments, the screen will be returned to the default state.

Attachment Category and Description

Courts can determine what is required for each attachment. In our court you must provide either a category from the drop down list, or type in a description. If you don't provide either of the above, an error message will prompt you to do so.

Document and Attachment Numbering

The document selection screen was modified to include the main document number, and the attachments are numbered beginning with 1. This way, the attachment numbers are consistent everywhere they appear (e.g., docket text, the document selection screen). Also the file sizes and the total size of all of the documents for a docket entry are displayed on the document selection screen.



The screenshot shows a 'Document Selection Menu' with the instruction 'Select the document you wish to view.' It lists a main document and two attachments with their respective page counts and file sizes. At the bottom, there are buttons for 'View All' and 'Download All' along with a summary of the total document size.

Document Selection Menu			
Select the document you wish to view.			
Document Number:	4	1 page	67 kb
Attachment	Description		
1	Appendix	1 page	67 kb
2	Exhibit	3 pages	39 kb
<input type="button" value="View All"/> or <input type="button" value="Download All"/>		5 pages	172 kb

New User Interface for Docketing

A new user interface is used in docketing so the user can readily see all case participants in a 'participant tree' during the process of selecting the filers and attorneys.

IMPORTANT

The new user interface utilizes "panes" on the screen, so the user must never click the browser Back button while working on screens that contain the case participant tree. Doing so will cause all progress to be lost, as data is not written to the database until the user clicks the Create Case button or completes the docketing process.

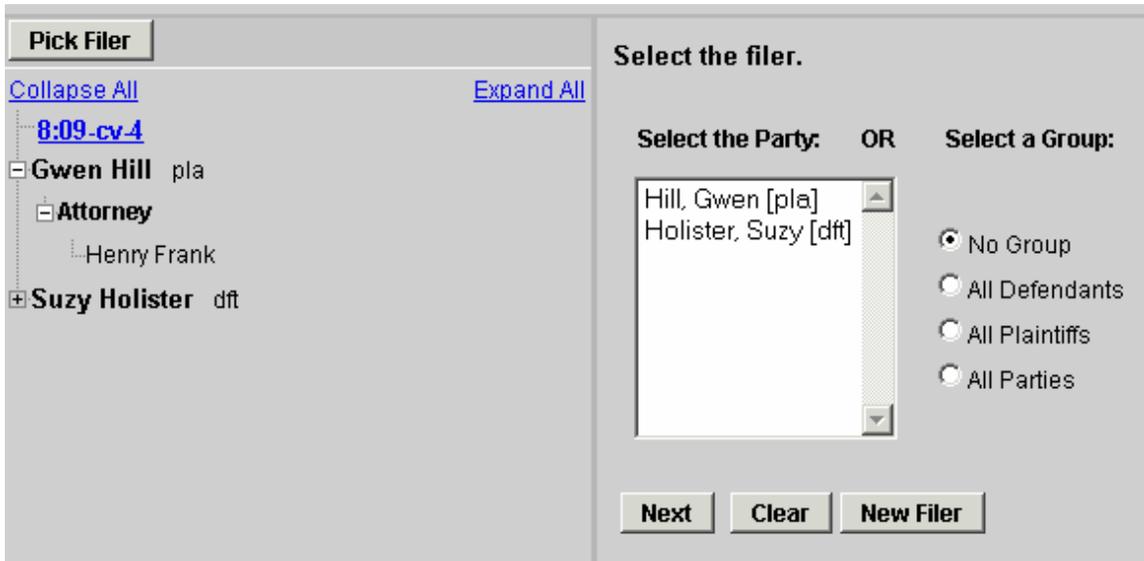
The New Icons

The following table provides a description for each of the icons that may appear in the participant tree.

Icon	Description
	Delete this party from this case.
	Add new alias, corporate parent, or attorney (only if allowed by the court).
	Copy attorney(s) from other parties in the case to this party (only if allowed by the court).
	Edit the party, alias, corporate parent, or attorney (only if allowed by the court). Only displays beside actual names of participants, so if no participant has been added, this icon is suppressed.

Additionally, the + and – icons for each node expand or collapse the node, respectively.

The Select a Filer screen displays with the existing parties in the participant tree on the left side of the screen. To select the filer, the user will choose from the party list on the right side of the screen.



The **Expand all** hyperlink displays all the participants in the case, once they are added. The **Collapse all** hyperlink displays only the parties in the case, with the other participants collapsed in the tree.

New User Interface for the Email Information Screen

The Email Information screen in Maintain Your Email has been modified to provide more streamlined functionality. Additional options are presented

to the user rather than being hidden. Cutting and pasting multiple case numbers from one delivery method to another is now allowed.

The initial state of the Email Information screen is shown in the figure below.

Email Information for Nicolas Mercator	
Registered e-mail addresses	Configuration options
Primary e-mail address: add new e-mail address	Select an e-mail address to configure.
Secondary e-mail addresses: add new e-mail address	
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	

The initial Email Information screen is divided into two sides. On the left side, there are two add new email address hyperlinks – one for the primary email address and one for the secondary email addresses. When the user clicks the add new E-mail address hyperlink for the primary email address, a text field appears on the right side of the screen. The user should enter his/her e-mail address in this field.

Email Information for Nicolas Mercator	
Registered e-mail addresses	Configuration options
Primary e-mail address: add new e-mail address	<input type="text"/>
Secondary e-mail addresses: add new e-mail address	
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	

Once the user enters a complete email address, configuration options appear under the email address on the right side of the screen. To access the configuration options for existing email addresses (listed on the left side of the screen), the user should click on the email address on the left.

Email Information for Nicolas Mercator

Registered e-mail addresses	Configuration options
<p><i>Primary e-mail address:</i> mercator@mercatorandmercatorinc.com</p> <p><i>Secondary e-mail addresses:</i> add new e-mail address</p> <p>Return to Person Information Screen Clear</p>	<p><input type="text" value="mercator@mercatorandmercatorinc.com"/></p> <p>Should this e-mail address receive notices? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>How should notices be sent to this e-mail address? <input checked="" type="radio"/> Per Filing <input type="radio"/> Summary Report</p> <p>In what format should notices be sent to this e-mail address? <input checked="" type="radio"/> HTML <input type="radio"/> Text</p> <p>Should this e-mail address receive general announcement notices from this court? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Show all cases for this e-mail address <small>(Copy case lists from here)</small></p>
	<p>Case-specific options</p> <p>Add additional cases for noticing</p> <p><input type="text"/></p> <p>These cases will send notice <i>per filing</i>. (default method)</p> <p><input type="text"/></p> <p>Remove selected cases Change selected cases to notice as a summary report</p> <p>These cases will send notice as a <i>summary report</i>. (alternate method)</p> <p><input type="text"/></p> <p>Remove selected cases Change selected cases to notice per filing</p>

Following is an explanation of each of the options that appear in the above figure.

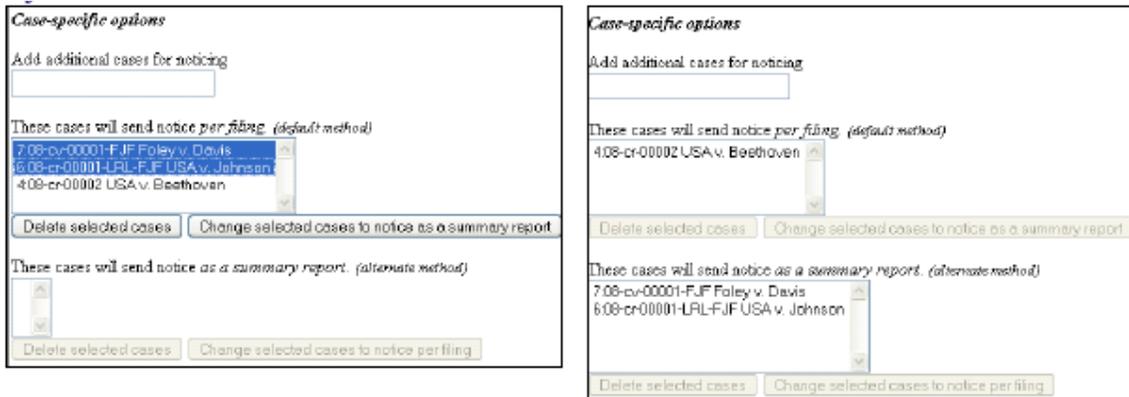
Option	Description
Should this e-mail address receive notices?	For the primary email address, the default is Yes . To disable the primary address, select No . If set to No , the primary email address will not receive notices of electronic filing (NEFs)—this is not recommended.
How should notices be sent to this e-mail address?	Sets the default delivery method for notices sent to this address. If Per Filing , an email will be sent for each individual NEF. If Summary Report , one daily summary email notice that lists all the filings for that day will be sent; if this option is selected, an additional option is added to the screen: <i>Should this e-mail address receive a "no activity" notice when no summary noticing occurs?</i> If Yes , the Daily Summary Report email will include the message "no transactions found for this time period" if no activity occurs in the cases for which the user is configured to receive summary notices. If No , then no email will be generated when there is no activity in the cases.
In what format should notices be sent to this e-mail address?	Controls the format of the emails—either HTML or Text .
Should this e-mail address receive general announcement notices from this court?	If No , the user will not receive general court announcement email message unless the court overrides the user's preference (e.g., the message is urgent and must be sent to all users).
Show all cases for this e-mail address	Displays a list of all of the cases for which the user is configured to receive NEFs.

To add additional cases for which to receive NEFs, enter the case number(s) in the Add additional cases for noticing text field and then either click **Enter** or **Find This Case**. After selecting the appropriate case(s),

click **Add case(s)**. This will add the case(s) to the list of cases in the default method of service list (the first list of cases).

To move cases from the default method list to the alternate method list, the user should click the case number(s) in the primary list and then click the **Change selected cases to notice as a summary report** button (if summary noticing is the default method, then this button will be labeled **Change selected cases to notice per filing**). The cases will be moved to the alternate method list. To delete cases from the default method list or the alternate method list, select the case(s) and then click the **Delete selected cases** button.

In the screen below, only the bottom right portion of the Email Information screen is shown.



For secondary email addresses, the additional **Should this e-mail address receive notice for all cases in which this individual is a participant?** option appears in the Configuration Options section of the screen. The user can answer **Yes** or **No**.

To remove an email address, the user should click on the address on the left side of the screen. This will cause the email address to display in a text field on the right side of the screen, along with all the configuration options and case lists (if any) associated with the email address. The user should remove the email address from the text field. If the user wants to change the email address to a different one, the user should immediately type the new address in the text field. If the user clicks anywhere outside the text field while a complete email address is not in the text field, all of the configuration options and case lists will disappear from the screen, and the previous email address and settings will be removed.