

Case Management/Electronic Case Files (CM/ECF) User's Manual for Case Opening, Electronic Case Files and Case Management



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New York, NY 10278**

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Access the CM/ECF System from the USCIT Web Site at: www.cit.uscourts.gov

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Case Management/Electronic Case Files (CM/ECF) User's Manual

I. Getting Started

Introduction

The Case Management/Electronic Case Files (CM/ECF) System is an electronic filing system used to view docket sheets, run case reports, and electronically file documents with the Court. The steps outlined in the manual must be followed when opening a case with the Court.

Hardware and Software Requirements

The hardware and software needed to electronically file, view and retrieve case documents include the following:

- A personal computer running a standard platform such as Windows or Macintosh
- A PDF-compatible word processor like Macintosh or Windows-based versions of WordPerfect or Word;
- Internet service;
- A web browser such as Netscape (including version 7.2), Internet Explorer (including version 6.0 and 7.0), or Mozilla Firefox (including version 1.5);
- Software to convert documents from word processor format to portable document format (PDF). Adobe Acrobat is recommended. Adobe Acrobat version 6.x, 7.x and 8.x adequately meet the CM/ECF filing requirements;
- Adobe Reader, which is available free, is needed for viewing PDF documents; and
- A scanner may be necessary to create electronic images of documents that are not in your word processing system.

I. Getting Started

Windows Conventions for the CM/ECF System

The following system prompts are used throughout the program.

	This button on the screen accepts the entry just made and displays the next entry screen, if any.
	This button on the browser toolbar allows users to return to a screen and correct an entry made on a previous screen.
	This button on the screen clears all characters entered in that particular box.
	This key on the keyboard allows users to select multiple entries within a given category by pressing and holding down on the Ctrl key when selecting entries.
	This button on the keyboard allows users to move from one field to another within a screen. Using Shift + Tab allows backward movement.

How to Access the System

Note: If you have not registered to use this system, you will not be able to sign in. (See Page 4).

To access the CM/ECF System follow these steps:

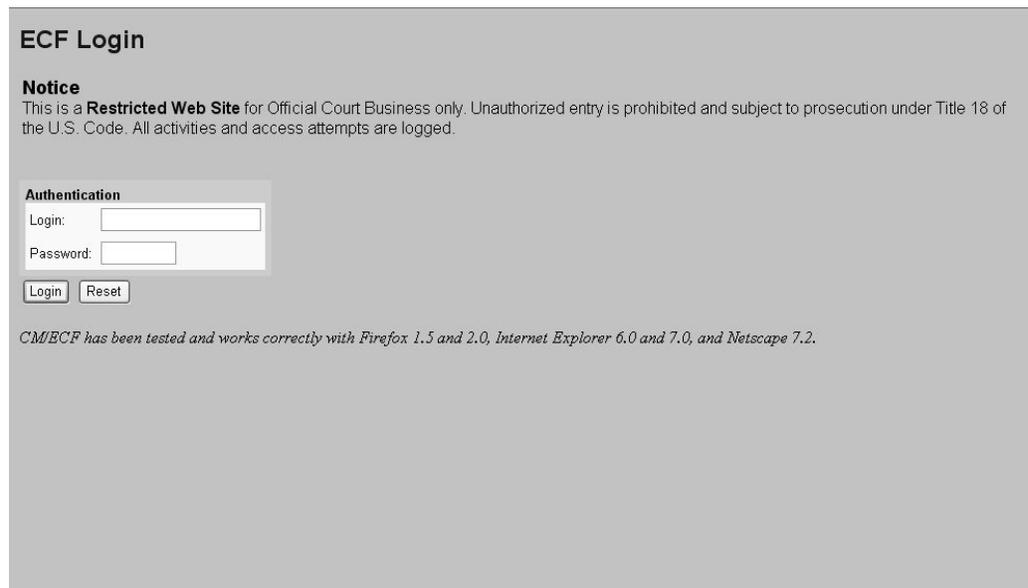
1. Open up your Internet browser (Netscape including version 7.2, Internet Explorer including versions 6.0 & 7.0, or Mozilla Firefox, including version 1.5);
2. Type in the Court's web address: <http://www.cit.uscourts.gov>;
3. Select **Case Management/Electronic Case Files (CM/ECF)** option on the left column;
4. Choose **Login to the Live CM/ECF Database** (or the Training CM/ECF Database if that is the one you wish to access), or, in lieu of steps 2 & 3, go to: <https://ecf.cit.uscourts.gov>;
5. Click **Live Database** (or Training);

I. Getting Started

How to Access the System (continued)

6. Enter your login & password in the appropriate field (see **Figure I-1.**) Login & Password are case-sensitive and must be entered exactly as they appear on your activation letter. **Note:** If you forgot your login or password, call the **CM/ECF Help Desk at 1-866-450-1859** during regular business hours, or file a *Notice of Loss/Compromise of Password* and a new one will be issued.
7. Click to access the system options.

Figure I - 1



ECF Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Authentication

Login:

Password:

CM/ECF has been tested and works correctly with Firefox 1.5 and 2.0, Internet Explorer 6.0 and 7.0, and Netscape 7.2.

Helpful Hints/Warnings When Working with the CM/ECF System

The following information will assist you while working with the CM/ECF software:

- ▶ Be careful not to place the cursor on any portion of the border while you are working in the CM/ECF system. If the cursor hits the border of the screen while you are working to input case information, the system will wipe out the information before you have a chance to save it.
- ▶ Keep the screen maximized while you are working.
- ▶ When adding individual names or business titles, be sure to type the first letter of the first and last names in capitals. The program is case-sensitive when you add names/titles. However, the system is not case-sensitive when searching for a name or business.
- ▶ While entering case information, if you return to a previous screen to make changes, you will need to re-enter all information after the changes because the system will wipe out previously entered information once you leave the entry screen.

I. Getting Started

- ▶ Select *fee waived* when the U.S. Government is filing the summons.
- ▶ **You may enter parties into the system one at a time, or all at one time.**

Filing Tips

As with manual filing, when filing summons and complaint concurrently, a **Certificate of Service** must be filed. (Sample at: http://www.cit.uscourts.gov/cmecf/CertService_62005.doc)

How to Register to Use the System

Every attorney who wishes to file documents electronically is required to complete a Registration Form. Registration forms may be accessed from the Court's website at the following web address: <http://www.cit.uscourts.gov>. A copy of the registration form (CM/ECF Form No. 1) is available in the Appendix on pages 13-14 in the *CM/ECF Registration (Attorney)* and on pages 20-21 of the Appendix in *CM/ECF Registration (Non-Attorney)*. In addition to individual e-mail addresses on registration forms, filers are encouraged to include general e-mail addresses for their firm/agency to ensure notification of all case activity.

All registration forms must be mailed to the Office of the Clerk, Admissions Office - Room 299, One Federal Plaza, New York, NY 10278-0001. Within two weeks of receipt of a completed registration form, the Clerk's Office will send users a login and password. After receiving a login and password, attorneys should file an entry of appearance in each of their cases if they wish to receive e-mail notification of case-related activities.

Please Note: Non-attorneys who register to use the CM/ECF system will be given Query-only access. These users will not have the ability to file documents electronically.

If users lose their Password, or their Password is compromised, they must file with the Court the *Notice of Loss/Compromise of CM/ECF User Password* (CM/ECF Form No. 9) as found in the Appendix on page 45 in *Loss or Compromise of CM/ECF Password*.

If users have a change in the information that appears on file with the Clerk's Office, then they are required to file with the Court the *Notice of Change in CM/ECF User Information* (CM/ECF Form No. 8) as found in the Appendix on page 26 in the document *Change in CM/ECF User Information for Attorneys* and on page 31 of the Appendix in the document *Change in CM/ECF User Information for Non-Attorneys*.

I. Getting Started

Help Desk

If you need assistance, call the Court’s Help Desk at (866) 450-1859 8:30 AM to 5:00 PM, Eastern time, Monday through Friday to speak to a Court staff member. After Court hours, calls will forward to voice mail and will be answered the next business day. Emergency Help Desk support will be unavailable after 5:00 PM Eastern Time, on weekends, holidays or any other day on which the Court is closed.

II CM/ECF System Options

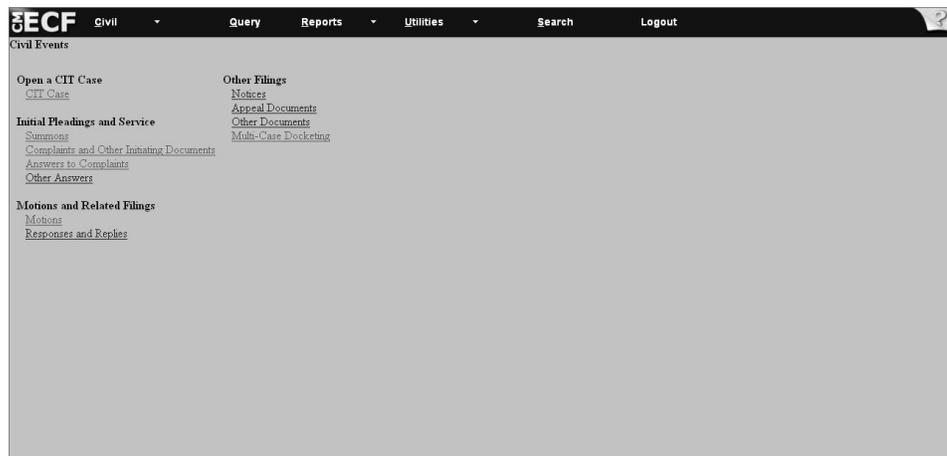
The CM/ECF system operates with a series of drop-down menus from the top menu-tabs as shown below in **Figure II-1**. Submenus within the system may be accessed by either clicking on an option in the drop-down menu, or by clicking the menu tab (in this case, *Civil*).

Figure II-1

For example, clicking the *Civil* menu tab will bring you to the *Civil Events* menu screen seen below.



Figure II-2

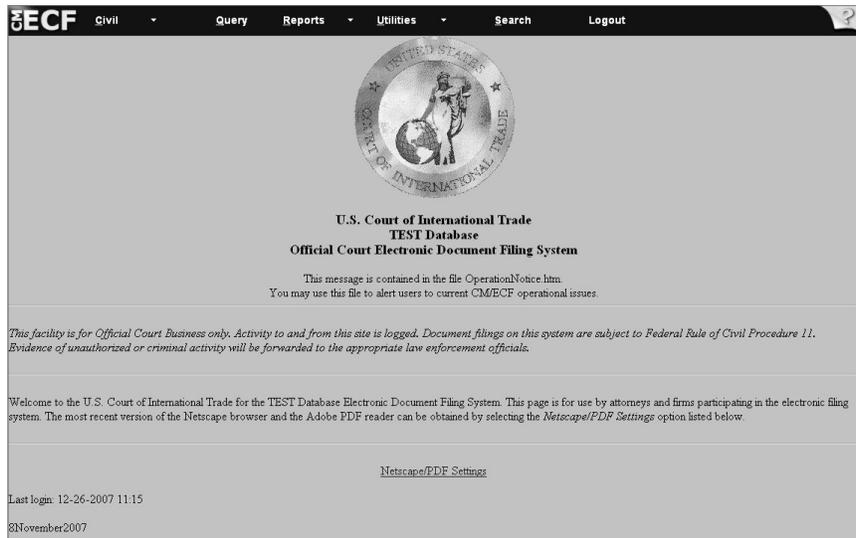


II. CM/ECF System Options (Continued)

Use of the Search Function:

When using the CM/ECF system, a search can be called up from *any* screen simply by clicking the text on the upper right-hand side of the menu bar that says, "Search." (See **Figure II - 3**)

Figure II - 3



A search box (See **Figure II - 4**) will appear on the screen, which will allow you to enter search terms (e.g., "Answer") as shown in **Figure II - 5**.

Figure II - 4

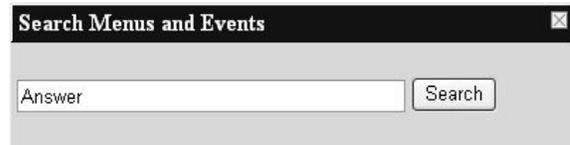
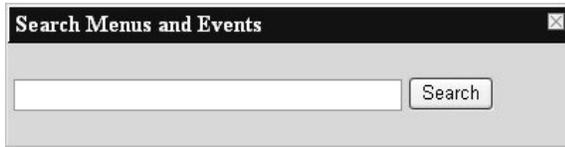
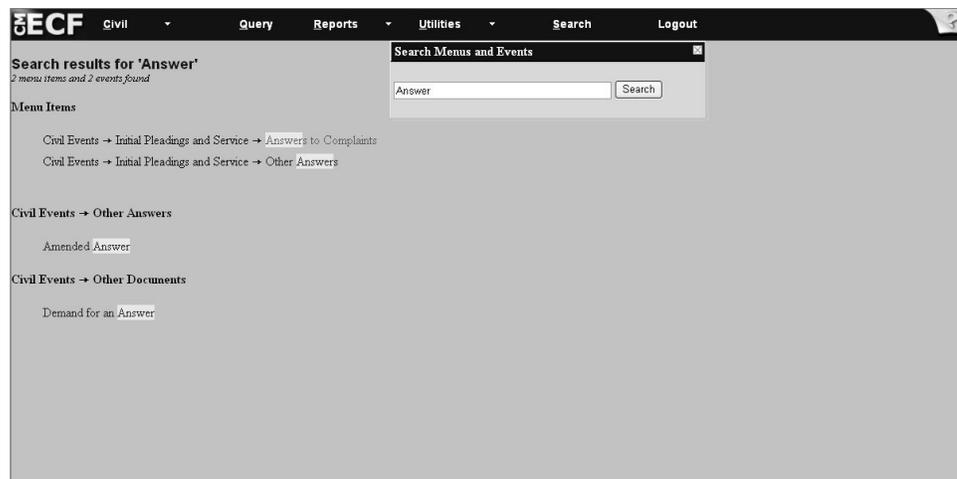


Figure II - 5

Once the search button is pressed, the results will appear on a new screen, with links to all areas containing the term you have searched (See **Figure II - 6**).

Figure II - 6



II. CM/ECF System Options (Continued)

The following CM/ECF system options are available.

Civil **Query** **Reports** **Utilities** **Search** **Logout** **? (Help)**

Civil Events Options

Open a CIT Case

CIT Case

Initial Pleadings & Service

Summons

Complaints & Other Initiating Documents

Answers to Complaints

Other Answers

Query Options

Alias

Associated Cases

Attorney

Deadlines/Hearings...

Docket Report...

Filers

Party

Related Transactions...

Status

View a Document

Reports Options

Docket Sheet

Civil Reports

Civil Cases

Calendar Events

Docket Activity

Other Civil Reports

Written Opinions

Motions and Related Filings

Motions

Responses & Replies

Other Filings

Notices

Appeal Documents

Other Documents

Multi-Case Docketing

Utilities Options

Your Account

View your Transaction Log

Review Billing History

Edit Data

Miscellaneous

Internet Payment History

Mailings...

Verify a Document

Release 3.1 Menu Items...

Search - use this feature to search Menus and Events for specific words or phrases.

Logout - select this feature to properly logout of the system. Simply closing out the browser is not sufficient. Filers may experience difficulty logging back into the system if they did not properly logout.

?(Help) - access definitions & explanations of terms used in the CM/ECF System. This feature can be accessed from any screen in the CM/ECF system by clicking the  on located in the upper right corner of the menu bar for assistance.

III. Basic User Information

Commonly Used Keys and Prompts in the CM/ECF System

[<i>Back</i>]	This button on the browser Toolbar allows you to return to a previous screen to correct entries.
	This button on the screen clears all characters entered in a particular box and sometimes on the screen.
[<i>Ctrl</i>]	This keyboard command allows you to select multiple entries within a given category by pressing and holding down the [<i>Ctrl</i>] key when selecting entries.
[<i>Tab</i>]	This button on the keyboard allows you to move forward from one field to another within a screen.
[<i>Shift</i>] + [<i>Tab</i>]	This key combination allows you to back up from one section to a previous section.

Add/Create a Party in the CM/ECF System

When the party for whom you are filing does not appear in the CM/ECF system, you need to add or create a party. Type in the first three characters of the party's business name (do not worry about capitalization) using a wildcard (*) before and after the three characters, for example, "*IBM*." The system will generate all the entries with the characters you typed. If the party's name does not appear among the list of entries, then add the party's information using the official style and abbreviation standards. (See pages 37 - 40 of the Appendix for copies of standards.)

Tip: Do not type in the complete party/business name since the system may already contain the party/business name but with a slight variation, for example, I.B.M. Corporation may be entered into the system as IBM Corp. If you typed in the full name I.B.M. Corporation, the system may respond that *No Parties were Found* since the typed entry did not match the system's entry.

Attorney Associations in CM/ECF

When prompted in CM/ECF to create *attorney associations*, it is recommended that you check the box. This action will create a link in the system between the attorney and the case. It will also add the attorney to the ECF event filing notification list for all parties associated with a case. Failure to check this box may result in failure to properly notify attorneys of case-related events.

III. Basic User Information for Working with the ECF System (continued)

Bulky Document Standard (BDS)

The Bulky Document Standard (BDS) (see Appendix pages 7-10 for a copy of the guidelines) for the electronic filing of documents on the Court's CM/ECF system limits the size of documents filed electronically.

Users may not file any document that is larger than 10 MB on the Court's CM/ECF system.

Exceptions to the BDS include the following documents: Summons, Complaint, Answer to Complaint, and Briefs (opening, response, reply) in the following: Motion for Summary Judgment, Motion for Judgment on Pleadings, Motion for Judgment on the Agency Record (1581(c)), Motion for Judgment on the Agency Record (all other Jurisdictions); and Motion to Dismiss.

Excepted documents greater than 10 MB **shall** be logically divided with a description of the divisions. No division of a document shall exceed 10 MB.

Example: Assume a motion is filed and exceeds the 10 MB limit. Divide the motion into logical divisions, making sure that each division is less than 10 MB. Name each division, for example, Motion Parts A-C and Motion Parts D-E. Enter the first division as the main document and enter the remaining divisions as attachments to the main document.

Exhibits that exceed 10 MB must be filed in the same manner as documents.

Example: Assume a motion is filed with three exhibits. Treat the exhibits as individual attachments and add each one separately. Name each exhibit, for example, Exhibit 1 (with a brief description), Exhibit 2 (with brief description) and Exhibit 3 (with a brief description). If the individual exhibit exceeds 10 MB, then divide each Exhibit and label it accordingly, for example Exhibit 1 Parts A-C and Exhibit 1 Parts D-E.

Note: See pages 17 - 21 for directions on how to add attachments.

To determine how many MB your documents are, the following information may be helpful:

- The size of the file will be normally be listed in the file properties;
- One Megabyte (MB) = 1000 Kilobytes(KB) and One Kilobyte(KB) = 1000 Bytes

III. Basic User Information for Working with the ECF System (continued)

Confidential Filings

Papers that contain confidential, business proprietary or classified information must be filed manually via the *Notice of Manual Filing* (CM/ECF Form No. 10) found in the Appendix on page 9. Public versions of the filing should be filed electronically. All confidential filings must be filed in accordance with the *Rules of the Court (Rule 81(h))*.

Correcting Mistakes

If you have to correct a mistake while entering information into the system, use the browser [*Back*] button to return to a previous screen to correct the entry. Correct the information on the screen.

Hit in order for the change to take effect and continue on to the next screen.

Please note that using the browser [*Forward*] key to advance to the screen where you left off after making the correction will not save the edited information. You must hit on the screen where the information was changed before proceeding to subsequent screens.

Also, once you return to a previous screen to correct a mistake, all information entered after the mistake is lost. Therefore, you will need to re-enter the information. It is highly recommended that mistakes are corrected once they are discovered rather than submitting incorrect docket entries and/or documents. If you do submit an incorrect document and/or docket entry, you will need to refer to *Administrative Order No. 02-01* for the necessary steps to correct the entries.

Documents Filed in Error

A document incorrectly filed in a case may be the result of posting the wrong PDF file to a docket entry, selecting the wrong document type from the menu, or simply entering the wrong case number and not catching the error before the transaction is completed.

Refer to §3(e) of Administrative Order No. 02-01 for the procedures to correct filings.

Exhibits - Physical

Any exhibit that cannot be converted to PDF format must be filed manually with the Court using the *Notice of Manual Filing* (CM/ECF Form No. 10) found in the Appendix on page 9.

III. Basic User Information for Working with the ECF System (continued)

Joint Filings

The option for joint filings will appear with every motion regardless of relevance. To establish a joint filing, complete the following steps.

1. Check joint filing on the first screen where the option appears;
2. Highlight all additional attorneys who have signed the filing;
3. Highlight all parties represented by the filing; and
4. **DO NOT** create any new attorney associations on this screen. Checking this box will create a permanent change in attorney/party association in the case. Only check the box to add yourself as an attorney to represent your client.

Important Note: A consent motion is not a joint filing. Therefore, please do not select this option if you are filing a consent motion.

Motions

Motions to Consolidate - Filers must make a docket entry for all cases involved.

Motions to Designate Test Case and For Suspension Thereunder - Filers must docket the entry for test case designation on proposed test case number, and docket the entry for suspension on all cases to be suspended thereunder.

Motions with Schedules - Filers must docket the entry for all cases involved. For the lead case, type in the free text box, “with schedule.” For those cases on the schedule, type in the free text box, “with (*lead court number*).”

Notice of Electronic Filing Screen

Upon completion of a docket event, the last screen the system displays is the notice of electronic filing screen (see **Figure III - 1 on the following page.**) This screen is the receipt of the filing. To print out the receipt, select your browser’s print function. To save the receipt on the hard drive, select **File** from the browser toolbar and select **Save Frame As** or **Save As** to

III. Basic User Information for Working with the ECF System (continued) Notice of Electronic Filing Screen (continued)

identify the drive where the receipt will be saved. Rename the file in the *File name* box.

- While in the notice of electronic filing screen, Select the *Document Number*, for example, *1*, to access the PDF document associated with the filing; (**Note:** If you filed both documents and attachments, the system gives you access to both. Click the numbers under the column entitled *Part No.* to view the attachments or documents.)
- While in the notice of electronic filing screen, Choose the *Case Number*, for example, *1:07-cv-355*, to access the docket sheet. (**Note:** The docket sheet entry screen may appear first. If it does, then click to access the actual docket sheet.)

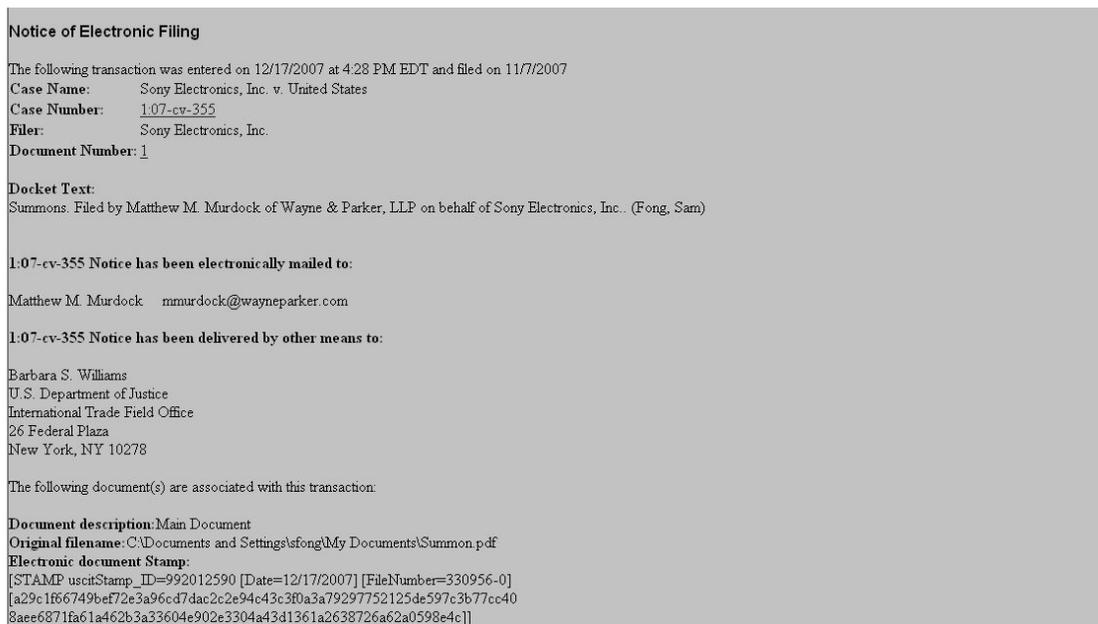


Figure III - 1

- Except as otherwise ordered by the Court, electronic filing of any document and the Court's transmission of a *Notice of Electronic Filing* of that document, as described in §5 of Administrative Order No. 02-01, shall constitute service of such document on all counsel or *pro se* parties who are registered CM/ECF Users (see **Figure III - 1**). Documents which are not filed electronically shall be served in non-electronic form in accordance with Rule 5 of the Rules of Court and the Court's electronic transmission of a notice of that filing shall **not** constitute service. (See § 6 of Administrative Order No. 02-01).

III. Basic User Information for Working with the ECF System (continued)

Notice of Manual Filing

The form *Notice of Manual Filing* (see CM/ECF Form No. 10 found on page 9 of the Appendix) is to be used when documents cannot be filed electronically. Circumstances under which the *Notice of Manual Filing* should be used include, but are not limited to, the following:

- (1) the electronic file size of the document exceeds 10 megabytes (MB);
- (2) the document cannot be converted to an electronic format;
- (3) the document contains confidential, business proprietary or classified information;
- (4) the document is filed under seal pursuant to Court Order;

Uniformity on Filings

For the purpose of uniformity, the Court requests that all motions be filed with a proposed order preceding the motions (unless otherwise noted in individual Chambers' procedure policy).

Please make separate entries for all forms, and enter the forms into the system in numerical order. For example, make separate entries for a *Notice of Appearance* (Form 11), *Business Proprietary Information Certification* (Form 17) and *Notification of Termination of Access to BPI* (Form 18).

Technical Difficulty with Court's CM/ECF System

When a document cannot be filed electronically because of Court CM/ECF technical difficulties and not a technical failure with the filer's equipment or Internet connection to the system, the filer should print (if possible) a copy of the error message received and complete a *Declaration that Party was Unable to File in a Timely Manner Due to Technical Difficulties* (CM/ECF Form No. 11 found in the Appendix on page 35).

If a filer misses a filing deadline as a result of the Court's technical difficulties, the filer shall contact the CM/ECF Help Desk at 1-866-450-1859 to inform the Clerk's Office of the difficulty. Additionally, the party shall submit the untimely filed document in paper form, accompanied by a declaration, CM/ECF Form No. 11. The document and declaration shall be filed by hand or overnight courier no later than 12:00 noon (Eastern Time) of the first day on which the Court is open for business following the original filing deadline.

III. Basic User Information for Working with the ECF System (continued)

Z Motion and Z Document

In order to help filers meet a deadline when they cannot find the appropriate system entry for the document they are attempting to file, the Court has created what is known as the “Z” motion and “Z” document. These entries appear as the last entries in their respective categories.

The following criteria must be met before a filer may use “Z” motion or “Z” document entries.

1. The filer cannot locate a suitable docket entry description in the CM/ECF system;

and;
2. The filing is due the day on which the filing is attempted;

and;
3. It is after the Court’s regular business hours (5:00 p.m. Eastern Time).

If it is during business hours of the Clerk’s Office, 8:30 a.m. to 5:00 p.m. Eastern Time, then call the CM/ECF Help Desk at 1-866-450-1859 for assistance.

If a filer uses the “Z” motion or “Z” document, then he/she must fully describe the document being filed and attach a copy of the document to the entry in order to preserve the filing date. Furthermore, when a filer uses a “Z” motion or “Z” document, the filer is to call the CM/ECF Help Desk at 1-866-450-1859 by 12:00 noon (Eastern Time) of the first day on which the Court is open for business after the “Z” motion and/or “Z” document was filed. The filer will be asked to provide the court number, the electronic filing date and the document number of the “Z” entry. The Clerk’s Office will correct the entry. No “Z” motion or “Z” document shall be left as the permanent entry in the CM/ECF system.

Filers should never use a “Z” entry when there is a suitable system entry for the document they are filing. Excessive and/or inappropriate use of the “Z” entry is discouraged and the Clerk’s Office will address this matter with the individual filer.

IV. Working with Adobe Acrobat and Portable Document Format (PDF) and Guidelines to Scan Documents

Adobe Reader (formerly Acrobat Reader) is a free application used to read, print and display documents in Portable Document Format (PDF). Adobe Acrobat is available at www.adobe.com. Please refer to Adobe's documentation and web site for help with Acrobat Reader. In order to create PDF documents, you will need Adobe Acrobat (not to be confused with Adobe Reader) or similar software, which must be purchased separately if you are using a word processor other than Corel WordPerfect 9 or higher.

Only PDF documents may be filed with the Court using the Court's Electronic Case Files system. Therefore, before you login to begin your filing session, please make sure you have converted your documents to PDF format. We do not recommend converting documents while attempting to file them. If you interrupt your filing session to convert a document to PDF format, you risk losing your filing data. To guarantee accurate filing, please view the PDF document before filing it to ensure that it appears in its entirety and in the proper format. Verifying the document up-front will prevent you from filing incorrect documents. You may not edit a document once it is converted to PDF format. If you notice an error in the document, you will need to correct the error in the software application in which the document was created and then convert the document into PDF format. Also, please be aware that the CM/ECF system will not accept PDF files that have the password security feature activated.

Although the Court prefers that PDF documents uploaded to the CM/ECF System be converted directly from the original word processing document, it is not always practical or feasible. Therefore, in those instances when filers scan documents to upload to the system, please follow these guidelines:

- scan the documents at no more than 300 dpi(dots per inch); and
- make the PDF document searchable by using the "paper capture" feature of Adobe Acrobat or its equivalent process in any alternative software you use.

IV. Working with Adobe Acrobat and Portable Document Format (PDF) (continued)

How To Convert Documents to PDF Format

To file documents with the Court, you must first scan or convert the document from its word processing format to PDF format.

The conversion process is relatively simple and can be accomplished using either WordPerfect or Microsoft Word. WordPerfect versions older than 9 and all versions of Microsoft Office require third-party PDF creation software. The following instructions assume you are either using WordPerfect 9 or higher with built-in PDF creation or an older version of WordPerfect (or Microsoft Word) with Adobe Acrobat version 5 or 6. Your computer's software and configuration may be different. If you experience problems or require additional help with this process, contact your organization's technical support staff or the vendor of your software.

For WordPerfect Version 6.1, 7 or 8

- Open the document you wish to convert in WordPerfect;
- Select **Print** and in the print dialog box select the option to change the selected printer. A drop-down menu with a list of printer choices is displayed.
- Select **Acrobat Distiller**.
 - Select **Print**. The file will not actually print out - it will give you the option to save the file in PDF format;
 - Name the file, giving it the extension .PDF;
 - Accept the option, The file is converted to a PDF document.

For WordPerfect Version 9 or higher

- Open the document, select **File** and **Publish to PDF**.
- Save the file as a PDF file, giving it a .PDF extension. The file is now in Adobe PDF format under the newly designated name, and the original document remains in its original form under the original name.

IV. Working with Adobe Acrobat and Portable Document Format (PDF)

(continued)

For Microsoft Word 95 or later

- Open the document;
- Select **Acrobat** from the menu (it is located to the right of **Help**) and **Create Adobe PDF**. If you do not have this menu, you can also follow the instructions for older versions of WordPerfect, above;
- Save the file as a PDF file, giving it a .PDF extension. The file is now in Adobe PDF format under the newly designated name, and the original document remains in its original form under the original name.

How to View a PDF File

- Start the Adobe Acrobat program;
- Go to the **File** menu and choose **Open**;
- Click the location and file name of the document to view;
- Acrobat loads the file and displays it on the screen; and
- Use the scroll bar and/or and the arrows to move through the document.

How to Attach a PDF Document

All files must be in PDF format with a .PDF extension in order for you to file your case-related documents. **Please Note: The system will not let you advance to the next screen unless you have selected a document to file.** If you attempt to upload a non-PDF file, or to make a standard docket entry, you will receive an error message.

IV. Working with Adobe Acrobat and Portable Document Format (PDF)

(continued)

Note: Filing Motions as One Document or Multiple Documents

When filing a motion as a docket entry, the Court recommends filing the motion, proposed order, memorandum and certificate of service, if any, as **one document**. However, the Court will accept it if a filer files the motion as the main document with supporting documents (proposed order, memorandum and certificate of service) as attachments. The Court prefers **one document**.

How to Attach a PDF Document (continued)

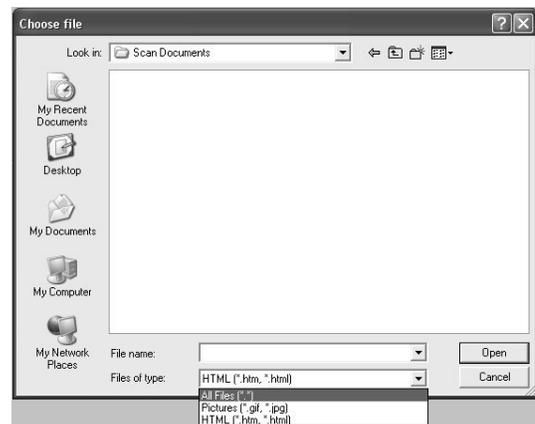
1. Click to select the drive and directory path, for example, *C:\199cv501-21.pdf*, where the document to be filed is located (see **Figure IV - 1**). The file upload dialogue box will appear (see **Figure IV - 2**).

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

Figure IV - 1

Note: Forms 5 & 13 should **not** be attached with a *Summons*. They should be filed separately. The same is true for *Motion to Intervene*.

Figure IV - 2

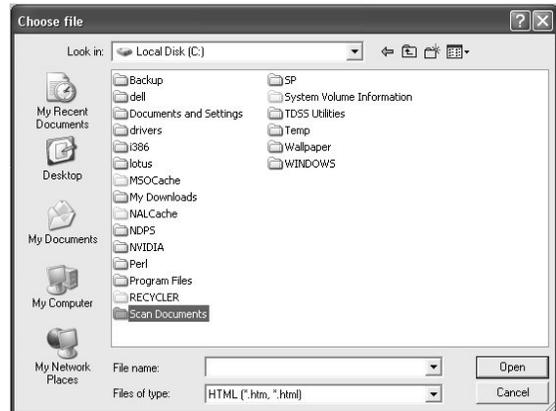


IV. Working with Adobe Acrobat and Portable Document Format (PDF) (continued)

How to Attach a PDF Document (continued)

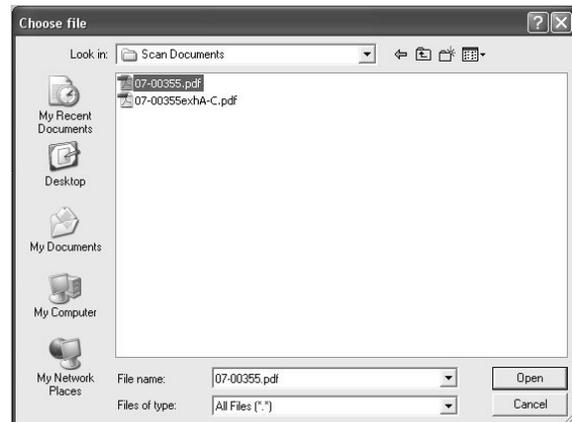
2. Press the drop down arrow to select the drive. At the bottom of the dialogue box is the **Files of type** field. Select the down arrow to the left of **Files of type** field and using the scroll bar select the option **All Files (*.*)**
3. The computer displays all the files in the selected drive (see **Figure IV - 3**).

Figure IV - 3



4. Select the filename by highlighting the document. To verify that you have located the correct document, right-click on a file name to bring up a menu & left-click **Open**. The PDF document will open and you can view it to verify that it is the correct document.
 - ▶ If it is the wrong document, then select another document.
 - ▶ If it is the correct document, then Select in the dialogue box.
Result: The filename and directory appear in the **File name** box on the PDF screen (see **Figure IV - 4**).

Figure IV - 4



IV. Working with Adobe Acrobat and Portable Document Format (PDF) (continued)

How to Attach a PDF Document (continued)

5. If there are no attachments to the document, then on the PDF screen click .
6. If you have attachments to add, browse for them, select a file to upload.(see **Fig. IV - 5**).

Figure IV - 5

The screenshot shows a web interface for a court case titled "1:07-cv-00355-N/A Sony Electronics, Inc. v. United States". The page is titled "Motions" and contains the instruction "Select the pdf document and any attachments." Under the "Main Document" section, there is a text input field containing "C:\Scan Documents\07-00355.pdf" and a "Browse..." button. Below this is a table with three columns: "Attachments", "Category", and "Description". The table has one row with the index "1.", an empty "Attachments" field with a "Browse..." button, an empty "Category" dropdown menu, and an empty "Description" text field. At the bottom of the form are "Next" and "Clear" buttons.

7. The system displays the attachments as you select them (see **Figure IV - 6**).

Figure IV - 6

This screenshot is similar to Figure IV - 5 but shows one attachment added to the table. The "Attachments" column for row "1." now contains the filename "C:\Scan Documents\07-00355exhA-C.pdf" and a "Browse..." button. The "Category" dropdown menu is set to "Exhibit" and the "Description" text field contains "A - C". A "Remove" button is located to the right of the description field. Row "2." remains empty. The "Next" and "Clear" buttons are still present at the bottom.

- ▶ If the filename does not appear in the dialogue box, then click and select the drive and directory path where the file is located.

IV. Working with Adobe Acrobat and Portable Document Format (PDF) (continued)

How to Attach a PDF Document (continued)

- ▶ Under **Type** select the drop down box for the type of attachment; for example, *Exhibit*.
- ▶ To describe the attachment more fully, click in the **Description** box and add a description; for example, *A - C*.
- ▶ Click .
- ▶ After you click , you will see an attachment file name listed in the dialog box (**Figure IV - 7**).

Note: If you made an error, highlight the attachment and click to remove the attachment. Repeat this sequence to add other attachments.

Select the pdf document and any attachments.

Main Document
C:\citdocument.pdf

Attachments	Category	Description
1. <input type="button" value="Browse..."/>	<input type="button" value="v"/>	<input type="text"/>

Figure IV - 7

8. Click when you are finished adding attachments.