APPENDIX: PUBLIC ACCESS CHANGES

A1   All PACER Users

A1.1 MDL Case Report Query

The Query menu includes the new <u>MDL Case Report</u> query. All cases associated with the same JPML (Judicial Panel on Multidistrict Litigation) number as the target case will be listed, sorted by case type, (descending so **md** case type sorts before **cv**) and case number. When the MDL Case Report is run, the user can determine whether all MDL-related cases or only pending MDL-related cases should display. The use of this feature is at the discretion of each court.

A1.2 Civil Cases Report

The Civil Cases Report now includes a *JPML number* field on the selection criteria screens, so the report can be run by JPML number.

A1.3 Query

When a query is run for a multi-defendant criminal case, the defendant numbers for the selected defendants now are included with the case number at the top of the query menu screen. If all of the defendants are selected, or if the main case is selected, the words **All Defendants** will appear beside the case number in lieu of the actual defendant numbers.

When the user runs a query on a person name, that name now is included at the top of the screen that lists all of the cases in which that person is a participant. The person's role is included at the top of the screen as well (for example, **Nicolas Mercator is an attorney in 6 cases.**). Additionally, a summary of selection criteria used for the query now appears at the bottom of the case list screen; however, if the query is run on a case number alone, the summary of selection criteria will not appear.

A1.4 Docket Report

The *Sort by* dropdown list on the Docket Report selection criteria screen now includes a **Document number** option. If selected, those entries without document numbers will appear chronologically within the entries that do have document numbers.

Some courts allow digital audio files to be uploaded to CM/ECF. When using the *View multiple documents* option for the Docket Report, users should not select any docket entries that have digital audio files attached (these entries are designated with a speaker icon), as the digital audio files embedded in the PDF documents for these entries are inaccessible in *View multiple documents* mode.

A2   ATTORNEY USERS

A2.1 New Password Requirements

CM/ECF now requires users to create more secure passwords. Passwords must be at least eight characters long and include both uppercase and lowercase alphabetic characters and at least one digit or special character (for example, 0-9, @, #, $, %, &, *, +).

After logging in with your current password, a pop-up message will instruct you to change your password.

Figure A2.1. Pop-up Message Instructing User to Change Password
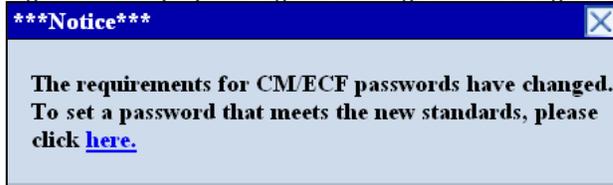
When you click on the here link, the following screen appears. Change your password and then click **Submit**.

Figure A2.2. Change Your Password Screen

A2.1 PDF/A

PDF/A is a standard format that allows for the long-term archiving of electronic documents with the assurance that the documents will be accessible in the future. In the future, courts will accept only PDF/A documents when filing in CM/ECF.   Unless the court requires PDF/A documents, CM/ECF will accept both PDF and PDF/A documents.

A2.1.1 Transitioning from PDF to PDF/A

When a court decides to begin requiring documents to be PDF/A compliant, users will need to modify certain settings in the program(s) used to create and view PDFs, as outlined below.

A2.1.1.1 Creating a PDF/A with Microsoft Word

1) To create a PDF/A directly from MS Word, the user must update the PDF conversion settings. In Word 2007, click on **Preferences** in the *Acrobat* menu in the ribbon:
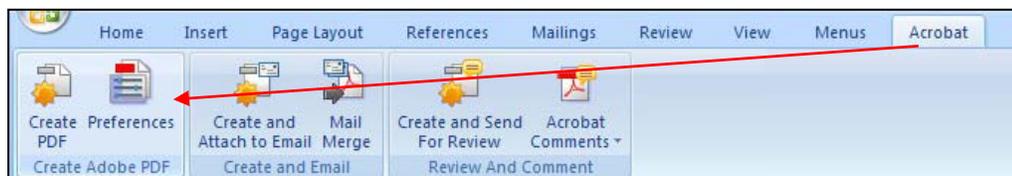
In older versions of Word, go to **Adobe PDF → Change Conversion Settings** to access the *PDFMaker* window.

2) In the *PDFMaker* window, click the **Create PDF/A-1a:2005 compliant file** checkbox, then click **OK**.
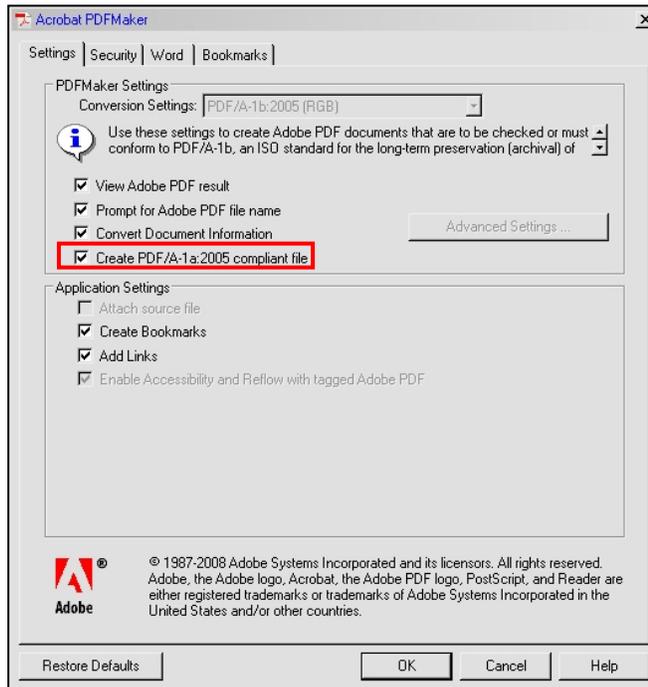
A2.1.1.2   Creating a PDF/A with Corel WordPerfect X4

Note: Older versions of WordPerfect do not include PDF/A in the *Compatibility* options.

1) To create a PDF/A directly from WordPerfect X4, click on **File → Publish to PDF**, then click **Settings**.
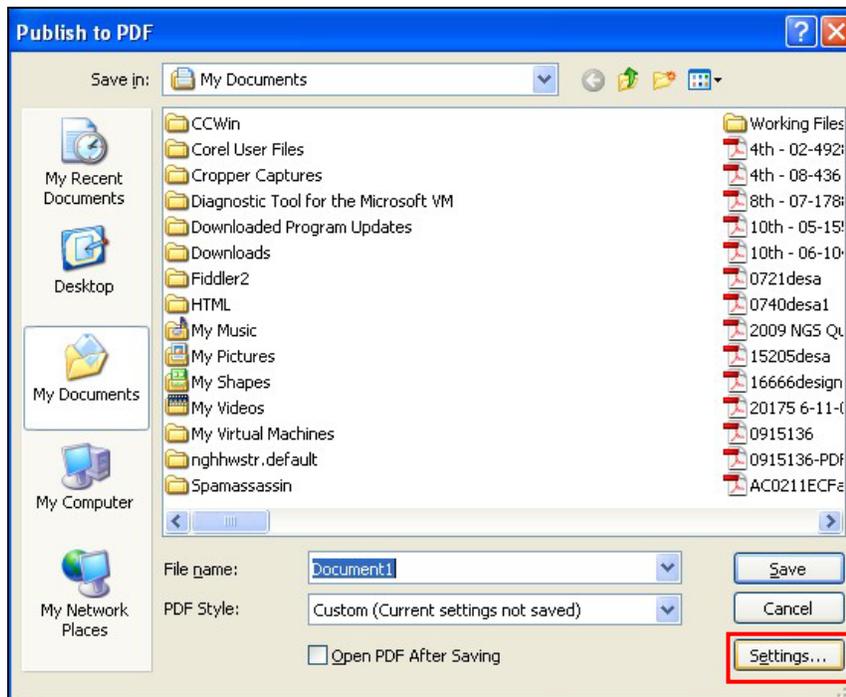
2) In the *Publish to PDF Settings* window, select **PDF/A-1a** from the *Compatibility* dropdown, then click **OK**.
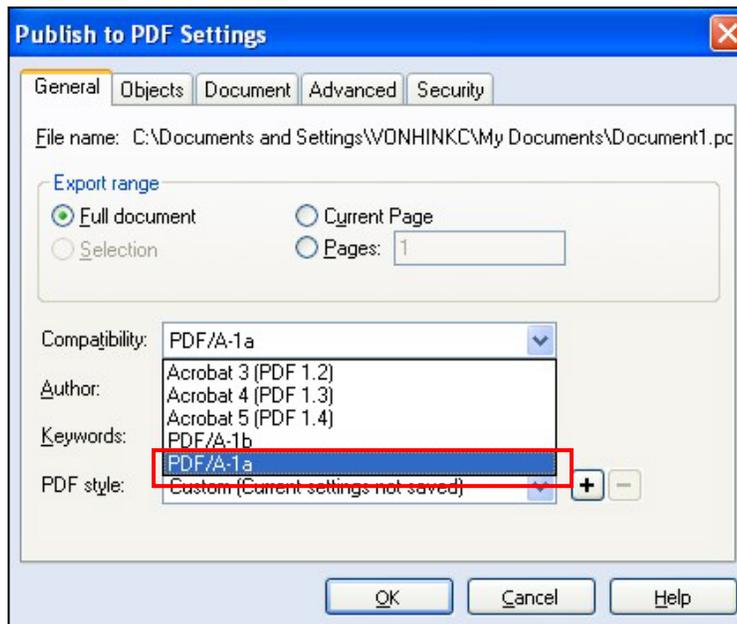
A2.1.1.3 Creating a PDF/A from Scanned Documents using Adobe

Note: Check your scanner manual to determine whether your scanner permits saving as PDF/A. If it does, follow the manufacturer's instructions to update the setting and disregard the steps below.

1) If the scanner is connected directly to the user's computer, go to **File → Create PDF → From Scanner → Configure Presets**. (If the scanner is not directly connected, go to Step 3, below).
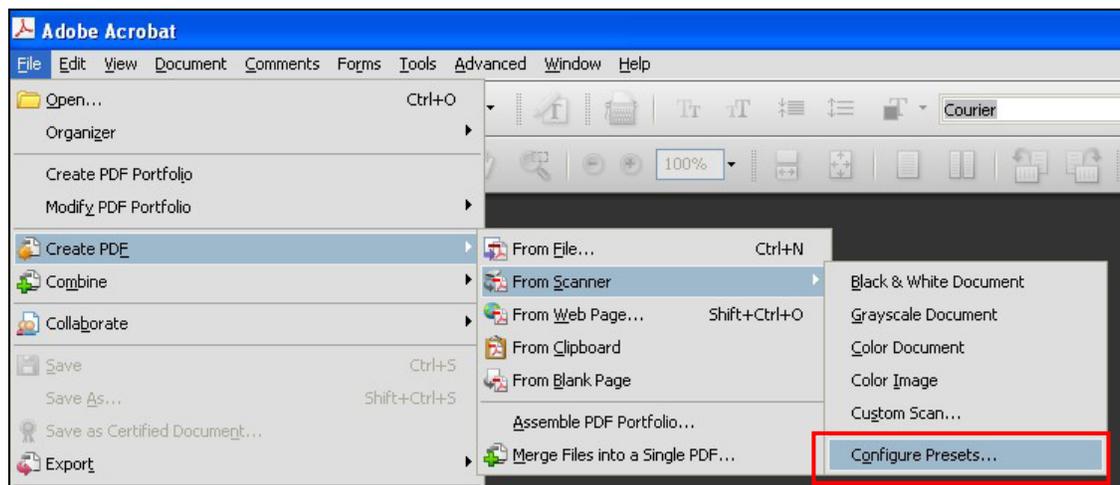
2) In the *PDFMaker* window, select the device and click the **Make PDF/A compliant** checkbox, then click **OK**.
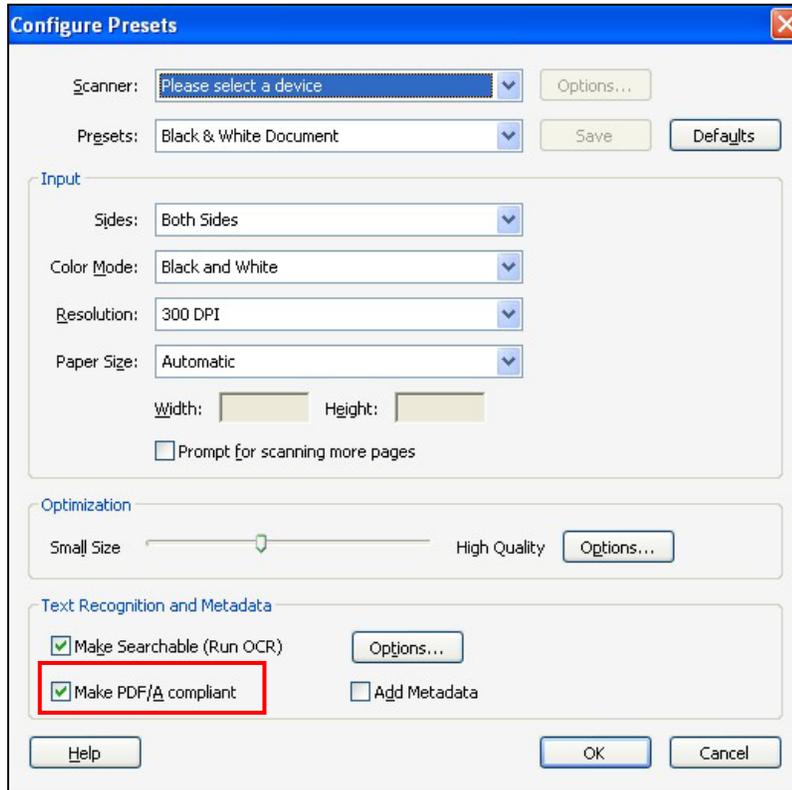
3) If the scanner is connected remotely via the user's network, scan the document as normal, creating a PDF. Then open the PDF in Adobe Acrobat 9 Professional and go to **Advanced → Preflight → PDF/A Compliance** to convert the PDF to PDF/A.
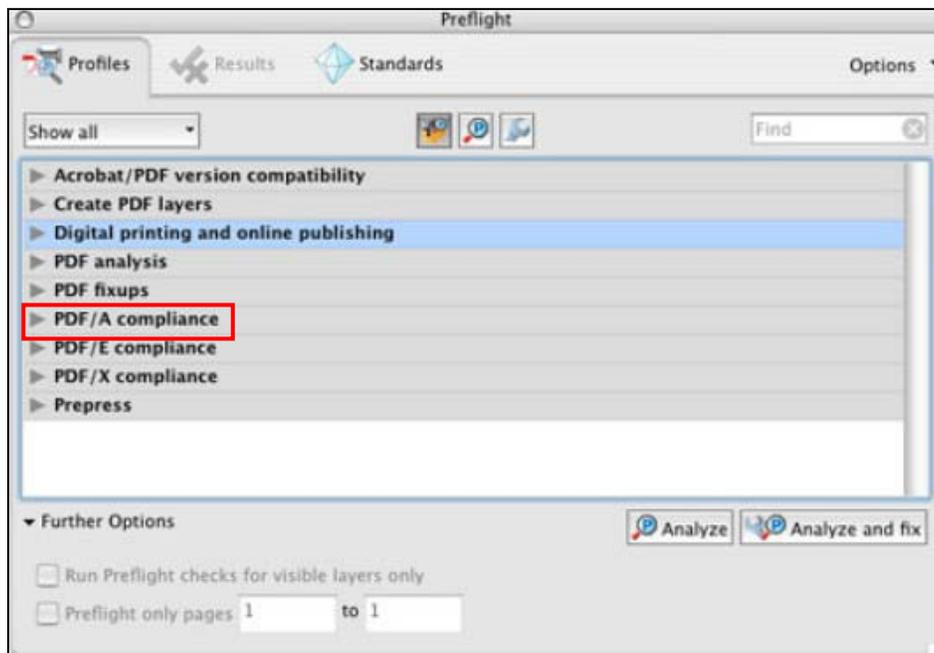
A2.1.1.4   Using Hyperlinks in PDF/A Documents

To access hyperlinks in a PDF/A document, in Adobe Acrobat/Reader, go to **Edit → Preferences → Documents**, and select **Never** in the *PDF/A View Mode* dropdown list.
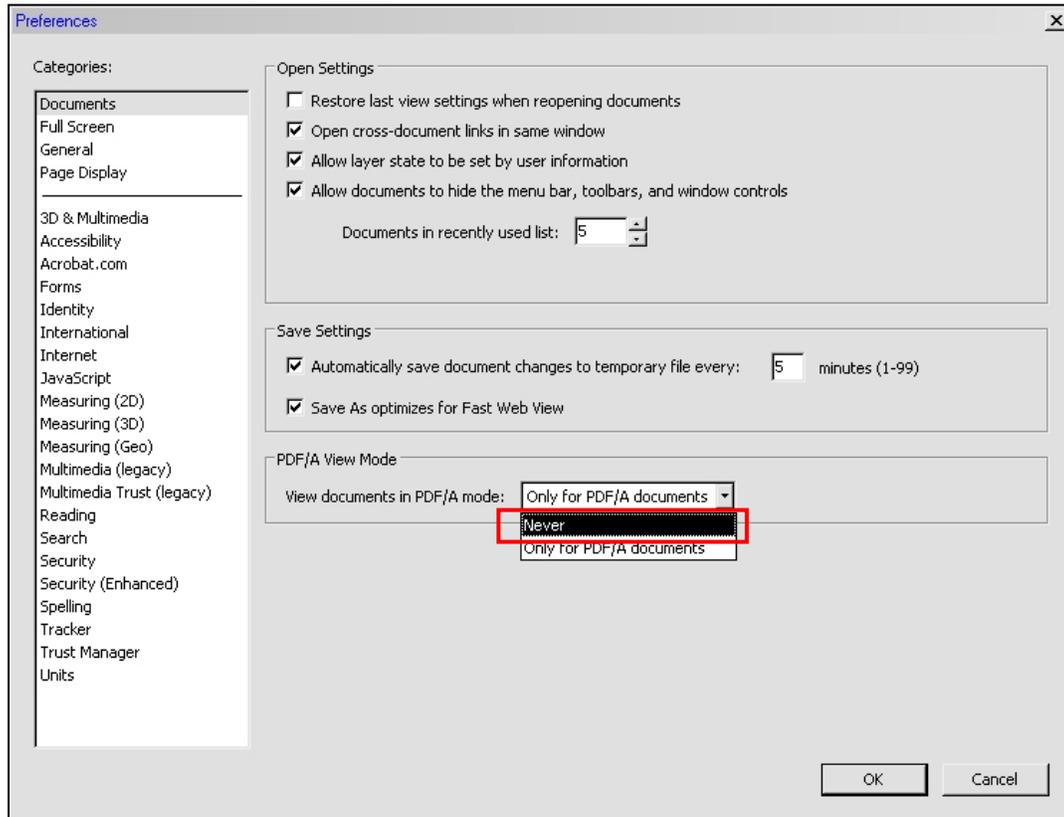
A2.2 Logging Out of CM/ECF

When you click **Logout** from the main blue menu bar, the following pop-up message will appear: