

**United States Bankruptcy Court
District of Utah
CM/ECF Version 3.2 Changes
9/14/2008
External User Information and Changes**

On Saturday, September 13, 2008, the court upgraded to version 3.2 of CM/ECF. All external users with third-party software including trustees should verify that the most recent version of their software has been installed or download the most current release in order to minimize problems with the new release of CM/ECF. The court has sent a notice to petition preparation software companies informing them of the September 13, 2008, 3.2 update.

1. New Drop Down Menus

A new cascading menu system for 3.2 has been created which allows users to hover over the blue main menu items (Bankruptcy, Adversary, Query, Reports, Utilities) that have a downward facing arrow showing the subordinate menu. Arrows pointing to the right indicate that a submenu exists. When users find the item they want, a click of the mouse will send them to the first screen of that event or report. (To use the old menu system, users can still click on a main menu item) The new interface also includes a navigation method for keyboard users. By using the 'Alt' key plus the underlined letters in each main menu item such as "n" for bankruptcy, the mouse clicks are not necessary.

Note: The speed with which a cascading menu displays varies according to how this option is used. If the user clicks an item on the top menu bar to display the corresponding menu (as was previously required), the cascading menu will take longer to display when he subsequently moves the cursor to one of those items; thus the user is given time to use the old "click" technique before the cascading menu appears. Once the user makes a selection from a cascading menu, those menus will display quickly.

The cascading menus now make it possible to create a bookmark for any menu item. This allows a user to put the most-used items on the browser's toolbar or in the bookmark menu.

2. Menu and Event Search Functionality

Version 3.2 includes a new search functionality to search for events and reports available on the system. The search function is not case sensitive. To use the new Menu and Event Search, click **Search** on the main blue menu bar. A small pop-up window appears for entering the text to be searched. Once the user enters text in the search box and clicks the magnifying-glass icon (or presses the *Enter* key) the results are displayed on the screen, with the search string characters highlighted.

Users may search for word fragments, such as 'eeting' instead of 'meeting. This functionality is not available to PACER users. The search results will display a highlight of the word fragment searched for and will only search for reports and events each user has access to. The word may appear anywhere in the name of a menu item or event. In the results view, each item is a link that takes you directly to the menu item or event.

3. Case Number Lookup

The process of specifying the case has been changed for areas in CM/ECF such as most report, utility, and docketing screens which require case number. The 'Next' button is now

inactive until a user enters a case number. As soon a case number is entered, the 'Next' button is activated. After clicking 'Next', the program looks up the case number. If a user clicks *Next* or pressed Enter and the case number IS NOT ambiguous, processing continues with the next screen.

4. Event Search - Docketing

When the user must choose from a long list of events to docket (as for the Motions/Applications category on the Bankruptcy Events menu), it is no longer necessary to scroll through the list to find the desired event or use the restrictive one character "hot key" and longer. A new text box is provided above the list to search for events using **any word** in the event title. As a user types a key word, the program reduces the list of available events to those events that match the search criteria. The search can also be made by a word fragment. The key word may be anywhere in the event name. The search is not case sensitive. Please note: The 'Next' button is inactive until you select an event. Multiple event selection within categories is still available in 3.2.

5. Claims/Creditor

a. When searching for a creditor to file a claim, the type of creditor selection allows for a blank value which allows the user to select one or all types.

b. When creditors are listed from a search to file a claim, holding the cursor over the name will display the number of claims for that creditor (transfers of claims show in parentheses). Please note **Internet Explore 6** or below will not have this functionality.

c. A pop-up window will appear when a creditor is selected showing the number of claims that have been filed and asking the user to confirm the creditor selection. If claim is no longer owned (transfer) by that creditor, the claim number is in parentheses.

d. When filing amended claims, there is now a new "Find" button on the claim filing screen allowing the user to find previously-filed claims. Clicking the find button will display a separate window showing all the claims filed for the case (giving the user ability to sort the display by creditor name or claim number) and selecting a claim to amend from this new window. Please note: If the user selects a claim to be amended that was filed by the same creditor, the values from the previous claim are copied into the Proof of Claim screen for editing. If the user selects a claim to be amended that had been filed by a different creditor, a confirmation/warning screen is displayed and users are given the opportunity to cancel or proceed (this procedure should NOT be used to transfer a claim from one creditor to another). Claim filers should utilize the "Find" option and verify the claimant when filing amended claims.

e. Another feature was added to the Proof of Claim screen so that the user can easily clear the values that were copied from the claim being amended. Clear all amounts at the bottom of the claim screen will remove the previous claim values.

6. Docketing

a. When adding a party during a docket event, the search values used for the search (first name, last name, middle name) are carried over. The previous version of CM/ECF only allowed the last name of the search to be carried over.

7. Transcripts

The court will be instituting a transcript policy in the weeks following the upgrade to version 3.2. Any information regarding the policy, including local forms, CM/ECF related docket events and any other material will be posted to the court's website and also emailed to all users of ECF.

8. Reports

a. Cases Report (**trustee filers only**)- The cases report has an added item to run the report for trustee users. "Assets" is now an option to find asset type cases (set to "yes," "no," or "unknown"). All users - The cases report will now specify the total count for both open and closed cases (displayed at the end of the report).

b. Claims Register - The claims register report generation screen now provides the users with a pop-up calendar button to select the date range of claims to search from. A new addition to the claims register display will be if a claim has been transferred, or the claimant has been modified, a "Claimant History" link is now displayed next to the *Creditor*.

9. Docket Report

The docket report generation screen has an enhanced to show a link to associated cases from the docket sheet. In addition, the ability create an appendix of documents, include headers when displaying PDF documents and also to view multiple (selected) documents has been added to the options for the docket report (the appendix, header and multiple documents functionality is not available to PACER users only ECF filers). These are valuable tools to combine or merge PDF documents from one case docket. The header option will display (and print) each document's filing details such as docket number, filing date, entered date and page numbers. Header note: headers will be automatically inserted to each PDF for the Create Appendix selection.

a. Viewing Multiple Documents - click on *Run Report*, and the user is presented with a screen for selecting docket entries directly from the docket sheet. Clicking *View Selected* then displays a PDF file with all the documents that are associated with the selected entries. Clicking *Download Selected* produces a compressed (.zip) file which the user can save to disk or other. A PACER billing receipt will be presented for the selected documents prior to the PDF files being displayed or downloaded. If the amount of data to be displayed/downloaded exceeds the size limit, a specified warning will appear allowing the user to reduce/change the selections.

b. Create Appendix - will produce a single PDF file that includes both a complete docket sheet AND images of the documents that the user selects (with PDF headers). The user makes the selection and clicks *Run Report*, and is presented with a screen for selecting the docket entries. At the bottom of the page, a "Footer format" box allows specification of your own designated text which will appear on each PDF page of the combined document. Clicking *View Selected* displays the Appendix file with all the documents associated with the selected entries. A PACER billing receipt will be presented for the selected documents prior to the PDF files being displayed or downloaded. **Note: Creating multiple views or creating an appendix may take additional processing time depending on the combined file size of the PDF.**

10. Utilities

a. Maintain Your ECF Account - a new option has been added to designate in your account preferences to add headers to all PDF documents which are displayed by the application

(CM/ECF). If a user selects the check box to “Add Headers to PDF Documents” in the account screen, headers will display anytime a PDF is viewed in ECF. However, any docket report selection to add headers (see the docket report section 9), will override the users default account selection.

b. Review PACER Billing History - This option now directs users to the PACER website.

c. View Your Transaction Log - The report output has been changed slightly for the column headers and fonts.

11. Browsers

The browsers supported for 3.2 are Internet Explorer 6/7 and Mozilla Firefox 2.

12. Document Links

CM/ECF version 3.2 now allows user to include document links in a PDF document to other cases or documents. The training department will be posting instructions to the court’s website for how to create and view links within a document.