Useful Computer Skills for the CM/ECF Environment

The skills summarized in the following pages assume a basic knowledge of Windows, Lotus Notes, WordPerfect and <u>CM/ECF</u>. These ideas have been contributed by many generous people. While the document is designed for court users and standard court software, the concepts are also useful in law office settings to achieve a paperless (or "less paper") environment. If you know of other skills beyond the basics that may be useful in the CM/ECF environment, or if you find needed corrections, please e-mail <u>mj.nuffer@utd.uscourts.gov</u>.

This document has hyperlinks, and is meant to be used in electronic form. An electronic form of this document is available at <u>http://www.utd.uscourts.gov/judges/nuffer_resources.htm</u>.

Table of Contents

Before Starting	
System Requirements	
Basic Skills	
Multiple Monitors or Large Monitors	
Windows	4
Windows Settings	
Windows Explorer Techniques	
Details View and Sorting	
Renaming, Copying, Cutting and Pasting	6
Universal Windows Skills	
Right Click	
Open in New Window	7
Paste Special	7
Make sending email enclosures easier	
Warning about Temp Files	9
Hints for working with Lotus Notes	
Open more than one window	
Find	
Search This View	
Index the database	
More Search This View options	
All Documents View	
Select multiple documents	
Sort by any column	
Create folders	
Create an archive	
Working with enclosures in Notes	
Copy and paste	
Save All	
Edit a Notes attachment	
Interoperability between Calendar and Mail	

Adobe Acrobat	17
Acrobat Preferences	17
Acrobat Tips	18
Full Screen View	18
Definitions	18
Find/Search	18
Getting PDF information into other documents	19
Copy and paste	19
Save to Word or RTF format	19
Snapshot tool	20
Recognize Text Using OCR	20
Annotating and Highlighting	21
Highlighting	21
Strikethrough and underline	21
Text box	21
Shape	22
Note comments	
Moving Pages	23
Creating Hyperlinks and Bookmarks in PDF Documents	24
Westlaw Hints	26
To copy text from Westlaw into WordPerfect	26
E-Research in Westlaw	
Creating Hyperlinks in Opinions	33
CM/ECF	36
Leveraging the power of CM/ECF with Multiple Windows	36
Jazzing Up CM/ECF Docket Text	
Finding Email Addresses	

Revised March 17, 2006

Before Starting

System Requirements

To easily use the techniques described in these materials you should have:

Personal computer with at least 512 mb RAM

Large monitor or multiple monitors (or superhuman patience and tenacity)

Word processing program

Lotus Notes email or other email program

Adobe Acrobat Standard or Pro or equivalent

Basic Skills

The skills explained in these materials all assume you can already:

□ access the Internet using an Internet Browser such as Internet Explorer or Netscape Navigator.

- □ do all of the following when using an Internet Browser:
 - Use the Forward and Backward buttons
 - Set up bookmarks (like the court's website)
 - Click on check boxes using a mouse [or trackball or touchpad]
 - Type in text boxes
 - Download files
 - Print documents
 - Set my home page address
 - Use hyperlinks
- access the court's website at <u>http://www.utd.uscourts.gov</u>.

use a windows-based word processing software package like Corel WordPerfect or Microsoft Word to create documents like motions, proposed orders, and/or other case correspondence.

use Adobe Acrobat Reader software to view and scroll through documents downloaded over the Internet as PDF (Portable Document Format) files.

- □ create, scan and print a document into a PDF format. This requires software beyond Adobe Acrobat Reader.
- save a document that you created by naming it and saving it as a file in a computer drive folder or directory, *and* later find the file to reopen the document.
- □ use the e-mail system in your office; attach a document to an e-mail message; open a document that has been e-mailed as an attachment; and save the attached document in a specific location.

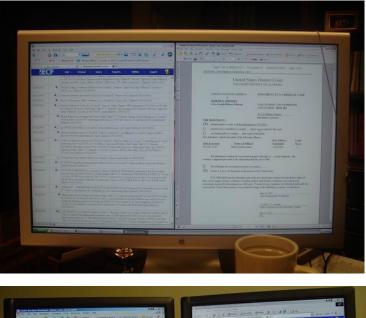
This list of Basic Skills is adapted from

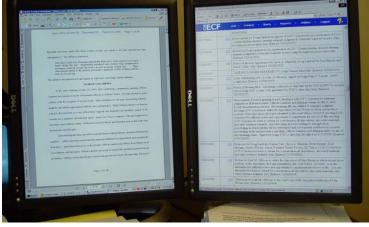
http://www.utd.uscourts.gov/cmecf/documents/skillschecklist.pdf

Multiple Monitors or Large Monitors

Fundamental to the ability to work effectively in the electronic world is an electronic desktop. In the paper world, we work on a large desk to be able to work with many items at once. In the electronic world, a large virtual desktop enables us to work simultaneously with many electronic sources of information while we do our work, which may include electronic composition, analysis and communication.

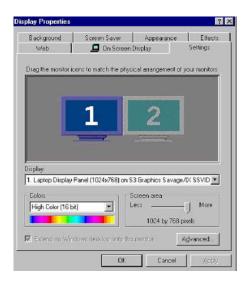
Multiple monitors or large monitors allow view of many source documents (Westlaw, Lexis, PACER, CM/ECF, PDF files) while composing other documents (Word or WordPerfect or CM/ECF). Multiple documents from the same application may be viewed side-by-side. Copying and pasting between screens or windows is possible because all monitors are connected to the same computer. The photo at right shows two rotated flat panel displays. If using multiple monitors, it is best to use identical displays.





Operating systems since Windows 98 permit creation of a large "virtual display" which spans several physical monitors, if the computer has a video display hardware which can drive two monitors. This dual display capability is built into most laptop computers. (control panel at right) The dual display features are regulated in the Display Properties control panel, Settings Tab. Microsoft help pages:

Turn on dual monitor support How to Enable Multiple Display Support Using Windows 98 HOW TO: Set Up and Troubleshoot Multiple Monitors in Windows 2000 (This article includes information on installing multiple display adapters.) HOW TO: Configure and Use Multiple Monitors in Windows XP



In many desktop computers, it is possible to use two standard display adapters to drive dual monitors to create a large integrated desktop.

Hardware Requirements for Multiple Display Support in Windows 98 Hardware Requirements for Multiple-Display Support in Windows XP

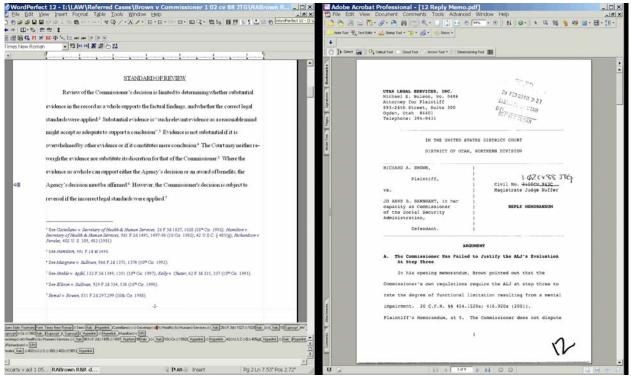
Many manufacturers supply single slot display adapters with two heads (cable connections) which support two monitors on each card.

<u>NVIDIA</u> <u>ATI</u> (use keyword "dual display" to search products) <u>Matrox</u>



Many display adapters are able to use special software which permits <u>rotation of displays</u>. A rotated flat panel allows the user to "page through" documents and see an entire page at a time on the virtual desktop. The user's experience with electronic documents then resembles use of paper on a physical desktop.

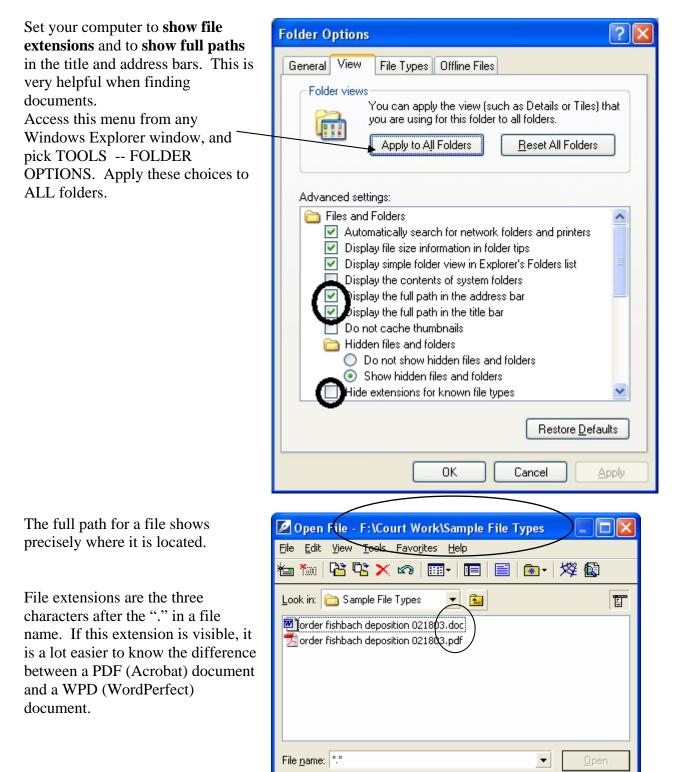
NVIDIA software ATI software



WordPerfect document

Adobe Acrobat document

Windows Windows Settings



File type:

🛅 All Files (*.*)

Find Now

•

Advanced...

Last modified: Any Ti 💌

Ne<u>w</u> Search

Close

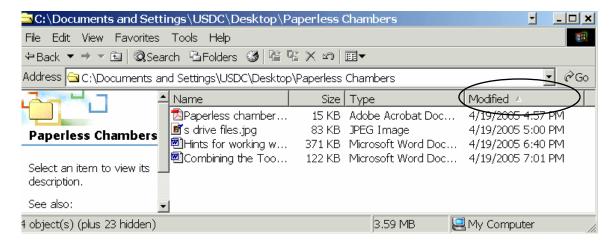
Windows Explorer Techniques

Details View and Sorting

More file information is available in the Details view in Windows Explorer (and any Open or Save dialog box).

🚾 C:\Documents and Settings\USDC\Desktop\Paperless Chambers									
File Edit View Favorites Tools Help									
⇔Back ▼ ⇒ ▼ 🛍 🔍 Sear	⇔Back ▼ → ▼ 🖻 🕺 Search 🗳 Folders 🥩 🦉 🧏 🏹 💴 🔳								
Address 🔂 C:\Documents and	d Settings\USDC\E)esktop\Paperless	• Large Icons		▼ @Go				
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Select an item to view its									
description.									
See also:									
My Documents									
Displays information about e	each item in the w	indow.			1.				

In Details view, you may sort by any of the columns, enabling you to put the oldest or newest documents at the top of the list or sort by file name. Click at the top of a column to sort by that column. This view is sorted by Modified date.



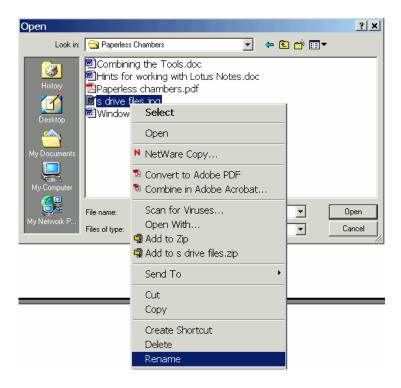
Open		? ×
Look in:	🔁 Paperless Chambers	- 🗢 🖻 💣 📰
<u>3</u>	Name ▲ ■Combining the Too	Size Type Save Desktop Icons 122 KB Microsc Restore Desktop Icons
History C Desktop	Hints for working w Paperless chamber s drive files.jpg Windows Explorer	371 KB Microsc Large Icons
My Documents		Details Thumbnails
My Computer	•	
My Network P	File name: s drive files.jp Files of type: All Files (*.*)	og Open Cancel
	Files of type: All Files (*.*)	

The Details view is available in any Open or Save dialog:

You may need to enlarge the box by tugging at the lower right corner.

Renaming, Copying, Cutting and Pasting

By right clicking on a file in the Open or Save box, you can rename it, copy or cut it, and navigate to another location to Save it. (The file must not be open or in use.)

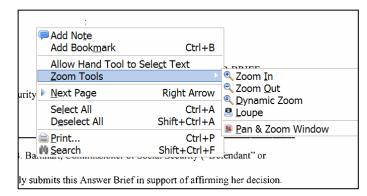


Universal Windows Skills

In almost all Windows based programs, there are some universal skills that make work easier.

Right Click

Right clicking usually reveals a menu. The menu varies from program to program and depends on what you click and what you are doing at the time. Most commonly used commands for that situation are on the menu that appears.



Right click menu in Acrobat Standard

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tes on	What's This?	rules
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Object	Reveal Codes	prov
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Right click menu in WordPerfect

Open in New Window

Almost any time you are working in a program with hyperlinks, you can choose to open the link in a new window. Right clicking reveals the menu option. This gives you two windows in the same program. See how this works in CM/ECF.



Paste Special

Sometimes when copying text from one program to paste into another, the receiving program misinterprets the copied material. Strange characters or formatting may appear. Instead of *paste* use *paste special* and choose to paste "unformatted text."

@Word								
File Edit View Insert Format Table								
🗅 🏝 🚅 เ	Undo	Ctrl+Z						
/⇔○(Redo	Ctrl+Shift+Z						
	Undo/Red	o History						
Times N	Cut	Ctrl+X						
II								
1 W	Сору	Ctrl+C						
Hov	Paste	Ctrl+V						
WOL	wou Paste Special							
wou	•							

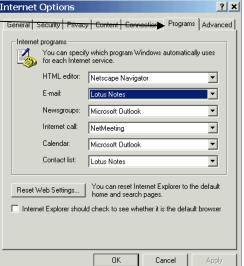
The pasted material will not carry unwanted formatting to its new location.

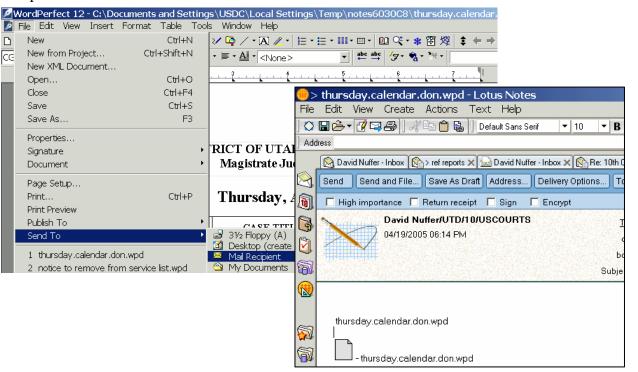
Make sending email enclosures easier, go to Internet Explorer, Tools, Internet Options:

🚰 Best Links from Judge Nuffer - Microsoft Interne								
File Edit View Favorites	Tools	Help						
⇔Back ▼ ⇒ ▼ ③ 🙆 🖄	Mail and News Synchronize Windows Update							
Address 🕘 http://info.utd.cir								
Google								
	Internet Options							

Click the Programs tab. Make sure Lotus Notes is selected as your Mail Program (assuming Notes is what you use for email). Internet Options General Security Privacy Content Connection Programs Adva Vou can specify which program Windows automatically uses for each Internet service. HTML editor: Netscape Navigator E-mail Colus Notes Newsgroups: Microsoft Outlook

Now, in Word Perfect and Acrobat Standard or Pro (but not in Acrobat Reader), when you select FILE, SEND TO, Mail Recipient, *the current document* will be an email attachment to a new email. The email opens for you to complete and send with the enclosure attached.





Warning about Temp Files

When working in Notes or CM/ECF, you may be working in a file that is not really saved anywhere you can find it again. Windows creates temporary files to work with documents it assumes you only want to view.

For example, if you OPEN a WordPerfect attachment in Notes, make edits and Save it in WordPerfect, you will lose your edits, because you were working on a temp file. (<u>Hints for</u> <u>Working With Lotus Notes</u> suggests SAVING that attachment if you intend to work on it, or using the Notes EDIT feature.)

Similarly, if you are viewing a PDF document by clicking on a CM/ECF link, and then using Acrobat to make <u>annotations or highlight</u> the document, those edits will *not* be saved in the court file version of the document and will *not* be saved on your computer in a location that you can find. So, you must SAVE A COPY or SAVE AS before doing work with a PDF document from CM/ECF.

Hints for working with Lotus Notes

To **open more than one window** open, right click the icon and select open a new window. This lets you see your calendar and inbox at the same time.



Notes has a great **find** feature (control - F):

Find			? 🗙
<u>F</u> ind			•
•	Find Options		
		Find <u>N</u> ext	Close

But Search This View is even more powerful:

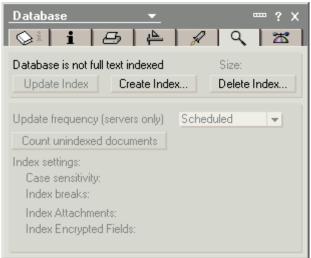
File	Edit	View	Create	Actions	Help					
] 🔿	8 💪	Ref	resh		F9					
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🐴 Re: 10	th CIRCUIT E	ECISIONS	×							
1	New Memo	Reply 🕶	Reply to All 🔻	Forward 🔻 De	lete Folder 🔻	Copy Into New 🔻	Tools 🔻			
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	т	ena Campb	ell 04/19/2	005 1,	,319 Re:					
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When you Search This View, the text of each message in the view is searched.

You may need to index the database if the button at the far right does not say "indexed."



To create an index, select FILE DATABASE PROPERTIES and on the magnifying glass tab, Create index.



When using the Search This View command, if you click the MORE down arrow, you get **more Search This View options**, allowing you to search by date, author, and on multiple words.

New Memo Reply Reply to All Forward Delete Folder	Copy Into New Tools
🔍 Search in View 'Inbox'	◯ Indexed ? ×
Search for	Search
Conditions IB Date A Author 「」Field I Form I≣	Multiple words
Options 🛛 🔽 Use word variants ('cat' will also find 'cats')	Sort results by relevance 💌
🗖 Fuzzy search 🛛 🗖 Search in results	O Lastindexed 04/19/2005
Save search Load search 🔻 Max results	4,833 documents Update Index
Who 🔨 🛛 Date 👻 🛛 Size 🗸 👘 Subject	t

🛛 🙈 David Nuffer - All Documents 🕅 Re: 10th CIRCUIT DECISIONS 🗙					
S Mail ▼	New Memo Reply Reply to All Forward Delete				
		Who ^	Date ~	Size ~	
🍐 Inbox (2)	*	Ruth Kawashima	01/09/2001	2,156	
🕅 Drafts	*	Markus Zimmer	01/11/2001	2,174	
🛐 Sent	*	Ruth Kawashima	01/11/2001	880	
million Trash	*	Ruth Kawashima	01/12/2001	645	
B 📾 Views	*	Cary Horrocks	01/18/2001	1,074	
All Documents	*	Louise York	01/23/2001	781	
	*	Wallo Raub	02/17/2001	1 352	

The All Documents View will let you see and search ALL DOCUMENTS!

You may **select multiple documents** at one time by pressing the spacebar when the document is selected, and then using the mouse or arrow keys to move on to other documents. They need not be contiguous.

		Who ^	Date 🔻	Size 🗸	Subject
		David Nuffer	04/19/2005	5,652	Re: 10th CIRCUIT DECISION
	~	Tena Campbell	04/19/2005	1,319	Re:
	~	Virginia_Morgan	04/19/2005	6,155	[members] E-Government Ac
	~	Ruth Kawashima	04/19/2005	6,791	Re: cause code list
l	~	Harwell_Davis	04/19/2005	7,815	[members] Interpreters {01}

Note that in any view, you may **sort by any column** that has an arrow or caret (Who, Date, Size in the above example).

When multiple documents are selected, you may select from the ACTION menu to do something to all the documents. *Be careful!* The command at the right will FORWARD all selected documents.

Actions Help	
Add Recipients	۲
Archive	۲
Send Memo to Database Manager	
Synchronize Address Book	
Upgrade Folder Design	
Categorize	
Edit	
Reply	۲
Reply to All	۲
Forward	۲
Delete	
Folder	۲
Copy Into New	۲
Tools	F

Create folders to hold your messages:

Create Actions Help	Create Folder	? ×
Memo Ctrl+M Reply Reply With History To Do Calendar Entry Special Other Bookmark Subscription	Folder name Untitled Select a location for the new folder Polders - Polders - Polders - Polders - Polders - ADR Polders - Attorney Record Retention	*
Agent Folder	Advanced OK Can	cel
Folder View		- 10
Desian		

You may create folders inside of folders.

If you **create an archive**, you can keep these folders on your own computer and not exceed your mailbox quota. In Lotus Notes Help, see **Archiving mail messages to free up space**. You can set up archiving to be "automatic" which scares me, or just set up the archive, use Search this View and multiple selection (with the space bar) to cut and paste items into the archive.

Working with enclosures in Notes:

You can **copy and paste** an enclosure from one Notes document to another:

Right click the enclosure to bring up the menu

Use traditional copy and paste to move the enclosure. Note the other options on the menu – SAVE ALL is useful to put multiple enclosures into a single location.

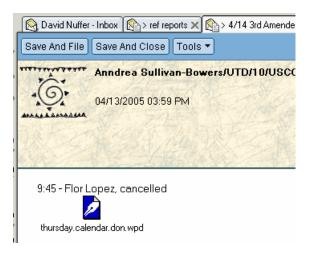
Note also that the menu has an EDIT option.

🍣 David Nuffer - Inb	ox 🛐 > ref reports 🗙
New Memo Reply	🔹 Reply To All 👻 Forward 💌 Delete
	th Kawashima/UTD/10/USCOURTS 01/2005 04:49 PM
Nuffer.b1A Nuffer Ruth Kawashim 801-524-6106	Attachment Properties

If you double click an enclosure, you also get some options, though fewer than with a right click.

Attachmer	nt 🔽 📼 🕯	? X
1 i		
Attachmen	nt Description	
File: Length: Modified: Encoding:		
Attachmen	t Actions	
View	Open Edit Save Delete	ə

If you want to **edit a Notes attachment without saving it somewhere**, and then having to go through the trouble of attaching it again, click EDIT. The changes you make will be saved in the Notes attachment. (So, this procedure is NOT GOOD if you want to save both the unedited version *and* the edited version.) This is helpful if you are circulating a document for quick review and only need to save the final version. When you finish editing the Notes attachment (in WordPerfect, for example), SAVE it, and then return to your Notes message. New buttons on the email message now require you to Save and File or Save and Close the Notes message. Save and Close the message, and then you can forward, reply etc.



Interoperability between Calendar and Mail

Notes will let you *email* a *calendar* entry and copy an *email* message into a *calendar* entry.

If you want to tell someone else about a calendar entry, open it and FORWARD it.

())	Forward this docum	ent to sp	ecified r	ecipients						
File	Edit View	/ Cre	eate	Actions	Text	Help				
	🖬 💪 • 🕜 🖾	a).	∦≞	Add Re	cipien	its			+	ý 🖻 🖺
Add	ress			Archive	,				•	•
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	Save and Close	•		Synchro Synchro Libarad	onize 1	Journal				
(i) (i)	Appoint			Upgrade Folder Design Process Titles						
8) T	Subject State Rules I		Quiae I	Categor	-ize					
5	заллест	otate i	(ules I	Forward	đ,					
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File	e Edit Viev	w Create Actions Text Help			
] 🔿	🖥 🍰 🕈 🖉 🖼			1 4 <mark>4</mark> 🗆 🖉	- 🔁 🚧 🚏 🖸
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	阕 David Nuffer	- Inbox 📵 David Nuffer - Calendar 🗙 👰 State Rules Meeting 🗙 🔯 New Memo 🗙			
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6	🗖 High impo	tance 🗖 Return receipt 🧧 Sign 📕 Encrypt			
3		David Nuffer/UTD/10/USCOURTS To john doe		and the pass of the	
)		02/06/2006 03:25 PM cc			
		bcc	2114-0235115-4-2010		
6		Subject Fw: State Rules I	vleeting		
🕵 🔆 🖓 🔕	Calendar Entr Appoint				
.	Subject	State Rules Meeting	Where	Location	Mathson Co
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	When	02/22/2006 16 06:00:00 f ⊙			

If you receive a meeting invitation that contains information about the meeting, **Copy Into New Calendar Entry**:

New Memo Reply Reply to All Forward Delete Folder	Copy Into New 🔻 Tools 🔻 👘
🔍 Search in View 'Inbox'	New Memo
	New Calendar Entry
Search for	New To Do

The entire mail message, including attachments, will copy to the calendar entry. This is useful for agendas and travel itineraries.

Remember, you can also <u>copy and paste a Notes attachment</u> into a calendar entry. Or you can include any document as an attachment for a calendar entry, just as if you were attaching a document to an email message.

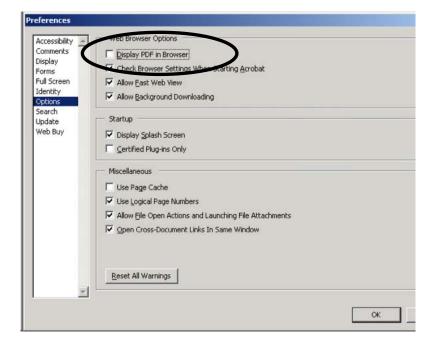
Adobe Acrobat

These tips pertain to Acrobat Standard or Pro, though some will work with Acrobat Reader. If you want to create or manipulate PDF documents, you need more than Acrobat Reader.

Acrobat Preferences

Adobe Acrobat, used to view PDF files, allows a user to customize preferences to operate better under CM ECF. *The locations of these preferences options may appear in different places in different versions of Acrobat.*

It is convenient to have PDF documents appear in a separate Acrobat window rather than inside the web browser. To make Acrobat open a new window and NOT open inside the web browser, make this selection so that you will NOT "Display PDF in Browser:"



If the computer monitor is large enough to make a full-page document readable, it is convenient to set Adobe Acrobat preferences to open a full page of a document in a window, so that the "Page Down" and "Page Up" keys will allow you to page through a document. To set Adobe Acrobat preferences to open a full page of a document in a window, make this selection:



Acrobat Tips

Full Screen View

To make a document appear full screen in Acrobat and Acrobat Reader, press Control L. Control L will revert to normal mode.

Definitions

Two definitions of the basic types of PDF documents are important to understand this section. A PDF file may be either:

- A "text" PDF created by selecting a "PDF creating" printer after you create your word processing document, or by using the WordPerfect "Publish to PDF" command or the Adobe PDF button in Microsoft Word. This method of creating a PDF results in a file that you can search for text, and from which you may copy and paste text. The PDF document may also be "SAVEd AS" in Microsoft Word format or RTF format. This will extract most of the text from the file (though formatting may be a little funky). Because of these features, this sort of PDF document is often called a "text" PDF. OR
- An "image" PDF made by scanning a document, with a scanner or a photocopier with "scan to PDF" ability. But if a PDF file is created by this method scanning then the file cannot be searched, copied from or SAVEd AS to Word or RTF format. This sort of PDF document is often called an "image" PDF.

Find/Search

To search an Acrobat text based document, press Control – F or, on the Edit menu, select Search. The results list has a hyperlink to each location of the search text. *This won't work with scanned documents (image PDF)*.

<	Search PDF Hide
What word or phrase would you like to search for? CM	Finished searching for:
Where would you like to search? In the current PDF document	Total instances found:
C All PDF Documents in	6
My Documents	New Search
Case-Sensitive	Results:
Search in Bookmarks	🐨 with CM/ECF Basic Computer Skills 📃
Search in Comments	Basic <u>CMECF</u> Skills Notices of Hearin
🔶Search	From <u>CM</u> ECF Notes enclosures Send

Getting PDF information into other documents:

Information from a PDF document may be used in other documents in several ways. If the PDF document is text based you may **copy and paste**, using the Text Select tool.



Archiving Making your own folders a	nd subfolders
Using the Chambers email	box as a routing tool
Sending from applications	
Eating documents in circu	<u>Copy To Clipboard</u>
Copying and pasting enclo	Select All Text
Forwarding a calendar enti	– Deselect All Text
Turning a mail entry into a	

You may also **Save to Word or RTF format**, resulting in a complete data file with all text in the document, though formatting may not be preserved.

Save As			? ×
Save in:	🔁 Paperless Cha	ambers 💽 🔶 🖻 🗰	•
History History Desktop My Documents My Computer			
Mu Notwork P	File name:	Paperless chambers.doc	Save
My Network P	Save as type:	Microsoft Word Document (*.doc)	Cancel
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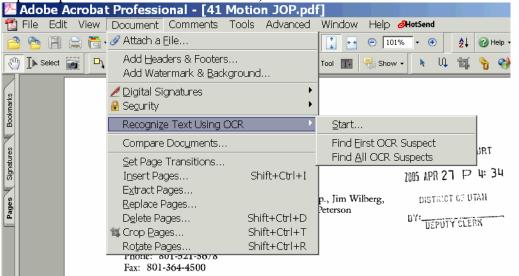
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In the dialog that appears select as much of the document as you want to work with in text. In this case I only wanted the current page:

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Pages All pages Current page
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OK Cancel

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PHILIP-JAMES ROBERTS,	:	мот
Plaintiff,	:	DEFI
v.	:	LARS
KEVIN BRADSHAW; JIM WILBERG; KAY	:	
LARSEN; CHAD WOOLEY; IVO RAY PETERSON; KEVIN SHEPHERD;	:	Ca
MT. PLEASANT CITY CORP., UTAH DEPT. OF PUBLIC SAFETY; ROBERT FLOWERS;	:	
and SID GROLL,	:	
Defendants.	:	

Annotating and Highlighting

PDF documents may be annotated and highlighted. Select the Highlighting tool on the Toolbar if it is showing or on the Tools, Commenting, Highlighting menu.

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Select text and it will be highlighted.

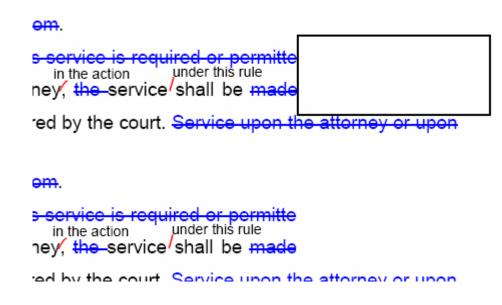
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program

Note that there are also **strikethrough** and **underline** tools.

To insert text, you may use a **text box:**

ttorney, the service shall be made upon t

You may cover things up with a white rectangle **shape**, with or without a border. *Note this is not an effective method of redaction*.



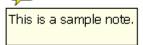
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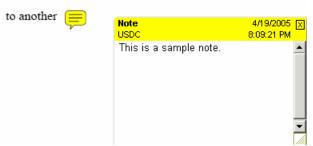
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to another



or if you click on the Note icon, the text of the Note is revealed:

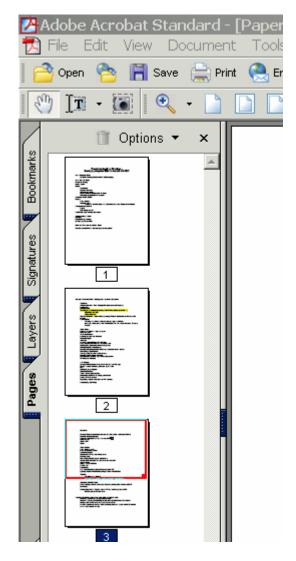
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Click the Pages tab and drag the pages around. You may even drag pages between documents.

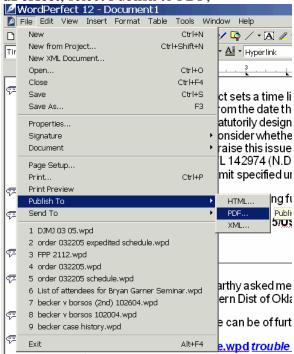


Or you may use the Document, Pages, commands:

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Creating Hyperlinks and Bookmarks in PDF Documents

The easiest way to create hyperlinks in a PDF document is to create the document with hyperlinks in a word processor and let the PDF conversion convert hyperlinks and bookmarks. You must have first created hyperlinks and bookmarks in the word processing document. These may include tables of contents, indexes, or Westlaw hyperlinks.



In WordPerfect, select Publish to PDF,

and make sure the option is selected to Include Hyperlinks and Generate Bookmarks.

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In Microsoft Word, you must use Adobe PDF Maker installed with Acrobat Standard or Pro

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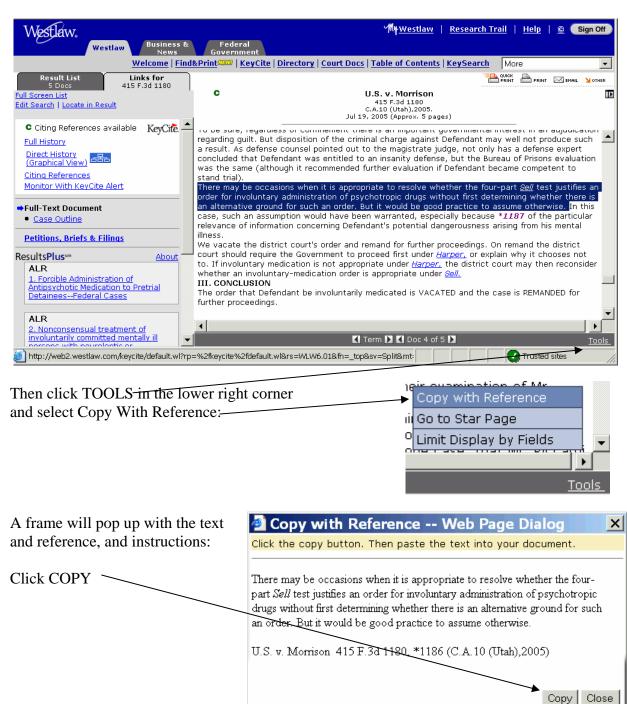


Then create the PDF document with the PDF Maker menu icon:



Westlaw Hints

To copy text from Westlaw into WordPerfect, find the text and select it:



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There will be a little reformatting to do but the essential information is in place.

	it is only after such a determination that "the defendant is subject to the provisions of section	
	4246.'' ¹⁰	
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	There may be occasions when it is appropriate to resolve whether the four-part Sell test justifies	
	an order for involuntary administration of psychotropic drugs without first determining whether	
	there is an alternative ground for such an order. But it would be good practice to assume	
	otherwise.	
	U.S. v. Morrison 415 F.3d1180, *1186 (C.A.10 (Utah),2005)	
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Result List Links for 5 Docs 415 F.3d 1180 Full Screen List Edit Search Locate in Result C Citing References available KeyCite Full History Direct History Direct History Email Citing References Monitor With KeyCite Alert *Full-Text Document Case Outline Petitions, Briefs & Filings Ohout	C U.S. v. Morrison 415 F.3d 1180 C.A.10 (Utah),2005. Jul 19, 2005 (Approx. 5 pages) To be sure, regardless or commentent there is an important governmentant merest in an adjudication regarding guilt. But disposition of the criminal charge against Defendant may well not produce such a result. As defense counsel pointed out to the magistrate judge, not only has a defense expert concluded that Defendant was entitled to an insanity defense, but the Bureau of Prisons evaluation was the same (although it recommended further evaluation if befendant became competent to stand trial). There may be occasions when it is appropriate to resolve whether the four-part <u>Sell</u> test justifies an order for involuntary administration of psychotropic drugs without first determining whether there is an alternative ground for such an order. But it would be good practice to assume otherwise. In this case, such an assumption would have been warranted, especially because *1187 of the particular relevance of information concerning Defendant's potential dangerousness arising from his mental illness. We vacate the district court's order and remand for further proceedings. On remand the district court should require the Government to proceed first under <u>Harper</u> , or explain why it chooses not
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It may well not produce such

In the dialog that appears, click on Current Destination Properties. (Setting Properties only has to be done once for the rest of your research career.) /

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In the dialog that appears, select

- 1. The name of your word processor (Word Perfect if you work for the courts and MS Word if you work anywhere else in the entire world)
- 2. Single Column (important for readability on the screen)
- 3. Save these selections as my default destinations

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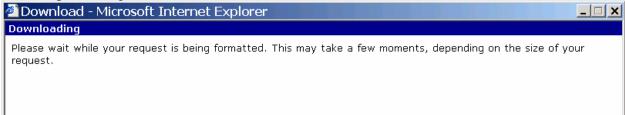
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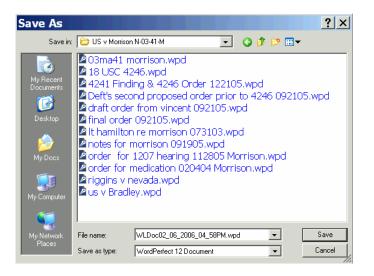
You will see a "processing" notice:



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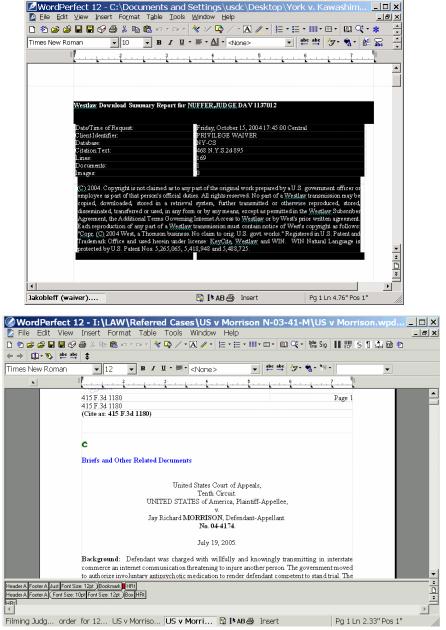
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Name the document something sensible! The Westlaw proposed name is NOT helpful.

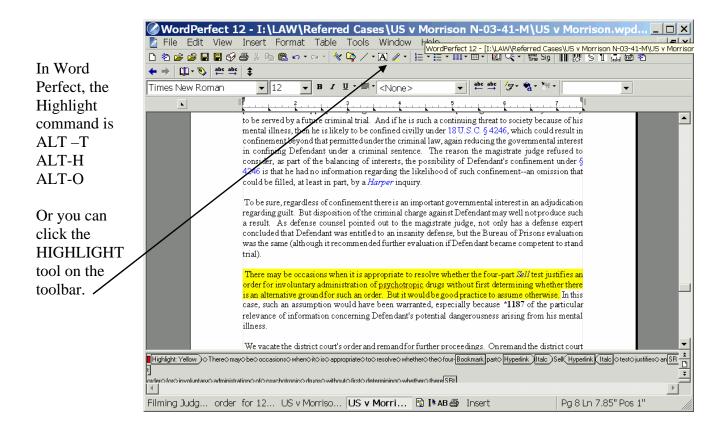


Click OPEN

If you see a summary page one – you don't need it – select and delete all the data on that page.



When the actual document is on the first page, CONTROL S to SAVE again. Now, as you work through the document (notice how nice it is to read in one column format) you can highlight as you go, and this is in your permanent record.



In Word, choose VIEW TOOLBARS REVIEWING TOOLBAR and use the highlighter tool:

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However, it simply cannot be said that plaintiff has placed her privileged communications with
her present attorney in issue, or that discovery of such communications is required to enable defendants to assert a defense or to prosecute their third-party claimTo conclude otherwise
would-render-the-privilege-illusory-in-all-legal-malpractice-actions:the-former-attorney-could,
merely by virtue of asserting a third-party claim for contribution against the present attorney,
effectively invade the privilege in every case.¶
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Creating Hyperlinks in Opinions

Westlaw and Lexis have automated tools to create hyperlinks to research sources in your WordPerfect, Word or Web Page documents. <u>WestCiteLink</u> <u>Lexlink</u> These work very well.

It is also possible to create hyperlinks manually. This process will be demonstrated for Westlaw hyperlinks in WordPerfect.

Find the reference which you want to turn into a hyperlink.

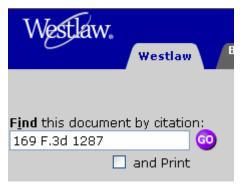
⁹Jones v. Kodak Medical Assistance Plan, 169 F.3d 1287, 1291 (10th Cir. 1999).

Select the cite and COPY.

⁹Jones v. Kodak Medical Assistance Plan, 169 F.3d 1287, 1291 (10th Cir. 1999).

Open Westlaw.

Paste the reference into the FIND box. Click GO



When the case comes up, press the Result List tab. There should be 1 case shown. (If there is more than one case, the balance of this process won't work.)

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Result List Links for 1 Doc 169 F.3d 1287		
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RIGHT CLICK the blue case name in the result list entry, and select COPY SHORTCUT

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Return to your word processing document and select the entire reference.



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The reference will change appearance (depending on the style of hyperlink in your document) and if you place your cursor over the reference, the link will appear.

⁹Jones v. Kodak Medical Assistance Plan, 169 [rlt=CLID_FQRLT5938810&ss=CNT&mt=Westlaw&cnt=DOC&vr=2.08]

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CM/ECF

Leveraging the power of CM/ECF with Multiple Windows

Looking at a motions report in CM/ECF (and almost every other screen) we see a docket hyperlink.

	MOTION for Protective Order filed by Plaintiff Vantage Controls (Expeditied Disposition Requested) (alt)							
	ective Order filed by Plaintiff Vantage Controls (all) rotective Order filed by Defendant Lutron Electronics. (jmr) stective Order filed by Plaintiff Vantage Controls. (jmr)							
	Magistrate Judge David Nuffer							
	Case number/ Document number	Notes						
4	2:03-cv-00488-TC-DON	Vantage Controls v. Lutron Elec Riled: 05/23/2003	Cause: 35.0271 Patent Infringement NOS: 830 Patent					

RIGHT CLICK that hyperlink and select OPEN IN NEW WINDOW MOTION for Protective Order filed by Plaintiff Vantage Controls (Expedited Disposition Requested) (all)

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		02/03/2006 252 MEMORANDUM in Support re [256] MOTION for Protective Order filed by Plaintiff Vantage Controls (all) 02/08/2006 260 MEMORANDUM in Opposition re [256] MOTION for Protective Order filed by Plaintiff Vantage Controls. (jmr) 02/09/2006 261 REPLY to Response to Motion re [256] MOTION for Protective Order filed by Plaintiff Vantage Controls. (jmr)				
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	Case number/ Document number	Case and Motion information	Notes			
	2 <u>03-cv-00488-TC-DC</u> M Open Open in N Save Tar <u>c</u>	lew Window Jet As	Cause: 350271 Patent Infringement NOS: 330 Patent QNee: Central Persider: Tena Campbell			

Now we can see two CM/ECF screens at the same time. (Note that only one screen has the blue bar.) In this view we can scan the docket (on the right) and verify that all documents related to the motion are showing on the motion report (on the left).

	Defendant Lutron Electronics (oversized document as 1/23/2006: document will be kept in the 5th floor sealed 02/02/2006 255 NOTICE OF HEARING ON MOTION re. [238] MOTIO	sot scanned - will be kept in permanent storage) (all i room (alf) IN for Partial Summary Judgment, [242] MOTION fo	File Edit View	v Favorite	strict Court:utd - Docket Report - Microsoft Internet Ex
	Summary Judgment, [240] MOTION for Partial Summar 230 before Judge Tena Campbell. (njm,)	y Judgment: Motion Hearing set for 3/23/2006 02 00) 🏠 🔎 Search 👷 Favorites 🕢 🖉 + 😓 🔯 - 🛄 🗱 d.circ10.dcr./cgi-biryDktRpt.pl?103496020716559-L_923_0 👻 🗃 Go 🛛 Links 滩 🔮
<u>25</u>	33 MOTION to Clauity Protective Order Motion, filed. 01/27/2006 Filed by: Lutron Electronics Referred to: Mugistrate Judge David Nuffer	Response filed 02/03/2006 Reply filed 02/08/2006	01/27/2006		ummerear or http://www. MOTION to Clarify Protective Order (expedited review requested) filed by Defendant Lutron Electronics (ab) (Entered 01/30/2006)
	Docket text and related filings: MOTION to Clarify Protective Order (expedited review requested) filed	t by Defendant Lutron Electronics (alf)	01/27/2006	@ <u>254</u>	MEMORANDUM in Support re 233 MOTION to Clarify Protective Order filed by Defendant Lutron Electronics (ab) (Entered 01/30/2006)
	01/27/2006 2-2 MEMORANDUM in Supports to [235] MOTION to Charly Protect 02/03/2006 227 MEMORANDUM in Opposition re [235] MOTION to Charly Prot 02/08/2006 228 REPLY to Response to Motion re [253] MOTION to Charly Protec		02022005	@ 255	NOTICE OF HEARING ON MOTION re: 238 MOTION for Partial Summary Judgment, 242 MOTION for Partial Summary Judgment, 240 MOTION for Partial Summary Judgment. Motion Hearing set for 3/22/2006 02:00 PM in Room 230 before Judge Tena Campbell (min.) (Entered: 02/02/2006)
25	6 MOTION for Protective Ocder Motion filed 2020/2006 Filed by: Vantage Controls Softward to: Magistrate Judge David Nuffer	Reporte filed.02/08/2006 Reply filed.02/09/2006	02/03/2006	@ <u>256</u>	(mpn,)(zmreta U2U22005) MOTION for Protective Order filed by Plaintiff Vastage Controls (Expedited Disposition Requested) (a)k (Entered: 0206/2006)
	Docket text and related filings: MOTION for Protective Order filed by Plaintiff Vantage Controls (Expe	editied Disposition Requested) (all)	02/03/2006	€ <u>257</u>	MEMORANDUM in Opposition re 253 MOTION to Clarify Protective Order, filed by Plainfff Vantage Controls (alt) (Entered 02/06/2006)
	02/03/2006 228 MEMORANDUM in Support re [256] MOTION for Pro 02/08/2006 260 MEMORANDUM in Opposition re [256] MOTION for 02/09/2006 261 REPLY to Response to Motion re [256] MOTION for Pr	Protective Order filed by Defendant Lutron Electron	02/03/2006	@ <u>258</u>	MEMORANDUM in Support re 256 MOTION for Protective Order filed by Plaintff Vantage Controls (alt) (Entered: 02/06/2006)
		concurve Order med by Fillman vanage Controls. (02/08/2006	@ <u>259</u>	REPLY to Response to Motion re 253 MOTION to Clarify Protective Order filed by Defendant Lutron Electronics. (jmr.) (Entered: 02/10/2006)
Case number/ Document number	Magistrate Judge David Nuffer Case and Motion information	Notes	02/08/2006	₽ 260	MEMORANDUM in Opposition re 256 MOTION for Protective Order filed by Defendant Lutron Electronics. (jmr.) (Entered: 02/10/2006)
cv-00488.TC-DON	Vaninge Controls v. Lutron Else Piled: 05/23/2003	Couse: 350271 Patent Infingement MOS: 330 Patent Qfro: Central Prantier: Tena Campball	02/09/2006	€ <u>261</u>	REPLY to Response to Motion re 256 MOTION for Protective Order filed by Plaintiff Vantage Controls. (mm) (Entered: 02/10/2006)

It is also possible to RIGHT CLICK the blue bar and OPEN IN NEW WINDOW. Here I clicked CIVIL, and selected OPEN IN NEW WINDOW.

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253	MOTIOL Motion) Riled by Copy Shorbout Referred Paste	Response filed 02/03/2006 Reply filed 02/03/2006			UNITORY to Clarify Protective Order (expedited review requested) filed by Defendant Lutron Electronics (alt) (Entered: 01/30/2006)
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	02/03/21 Convert link target to existing PDF of 02/03/22 Properties	Clarify Protective Order filed by Defendant Lutron Electronics (all) to Clarify Protective Order, filed by Plaintff Vantage Controls (all) o Clarify Protective Order filed by Defendant Lutron Electronics. (jmr)		@ 255	NOTICE OF HEARING ON MOTION re 238 MOTION for Partial Summary Judgment, 242 MOTION for Partial Summary Judgment, 240 MOTION for Partial Summary Judgment: Motion Hearing ret for 3/23/2006 02:00 PM in Room 230 before Judge Tena Campbell. (min.) (Entered 02/02/2006)
256 MOTIONTOFTROOPWORT Motion, filed. 02/02/2006 Pited by: Vaninge Controls Referred to: Magintade Judge David Nuffer		Besponse filed 02/08/2006 Reply filed 02/09/2006		@ <u>236</u>	MOTION for Prosective Order field by Plaintiff Vantage Controls (Expedited Disposition Requested) (al) (Entered: 02/06/2006)
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	02/09/2006 201 REFLY to Response to Motion ze [2:6] MOTION for Protective Order field by Flandiff Vantage Controls. (jm) Magistrate Judge David Nuffer				REPLY to Response to Motion re 252 MOTION to Clarify Protective Order filed by Defendant Lutron Electronics. (intr) (Entered: 02/10/2006)
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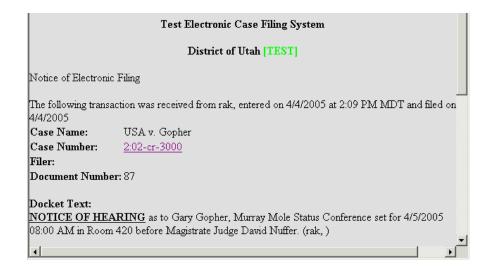
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Jazzing Up CM/ECF Docket Text

It is possible to use HTML code to dress up CM/ECF docket entries. This has been done by default in one standard entry in our system, the Notice of Hearing. The text enhancement helps the notice stand out.

03/14/2005	€ <u>86</u>	MOTION for Acquittal by Gary Gopher as to Murray Mole. (rgj,) (Entered: 03/14/2005)
04/04/2005		NOTICE OF HEARING as to Gary Gopher, Murray Mole Status Conference set for 4/5/2005 08:00 AM in Room 420 before Magistrate Judge David Nuffer. (rak,) (Entered: 04/04/2005)



A CM/ECF user may create special formatting in any docket entry with the use of HTML (HyperText Markup Language) code. The HTML code must be manually entered.

Compare these two docket entries. The first includes several HTML coding features that were inserted by the docketer:

Line breaks Bold type Italics Hyperlink

03/03/2005	●13	NOTICE of CM/ECF Status: Test Filing The court has received about 40 test filings by attorneys in our test filing project. The feedback from attorneys has helped refine the draft administrative procedures which will be updated in the first half of March and reviewed at the Court Technology Committee Meeting March 17th. Test filing will likely end in March, so if you (or the designated person in your firm) has not yet test filed, please do so. Automated Help System The court has installed its automated help system, with a database of answers available on a 24x7 basis. <u>http://ors.utd.uscourts.gov/cgi-bin/wonderdesk/wonderdesk.cgi?db=faq&uid=default</u> The searchable database will be expanded as questions come in and answers are developed. (<i>Nutfler, David</i>) (Entered: 03/03/2005)
03/04/2005	● <u>14</u>	NOTICE: The Court has received 33 successful test filings by attorneys in our test filing project. That is a sufficient number for the purposes of the experiment, and we're ready to move on to the next stage. As a result, this test filing project will end at the close of business on Tuesday, March 8, 2005. If you or the designated filer in your firm has not yet test filed, you have until then to try it out. We thank all of you who submitted filings as a part of this experiment. (rgj,) (Entered: 03/04/2005)

HTML coding is not too hard, but should be practiced in the TEST or TRAIN database.

br> creates a line break.

All other HTML code requires a beginning code and ending code.

 bold <i> </i> italic <u> </u> underline

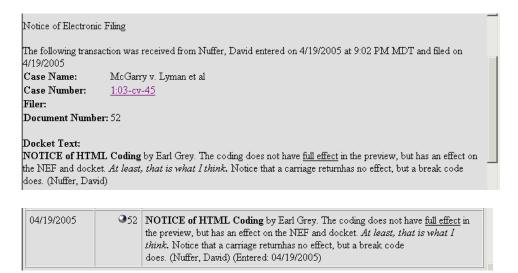
Here is an example of HTML coding entered in the next to the last screen in CM. Note the beginning and ending codes.

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In the final CM docketing screen, the effect of the HTML coding shows *in part*. Bold does not show (because everything in this screen is bolc), but italic, underline, and breaks do show.

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The full effect of the HTML code shows in the NEF and docket entry:



Notice that a carriage return entered in CM docketing does not even create a space. So, don't use carriage returns in CM docketing.

Finding Email Addresses:

CM/ECF can help you find email addresses in Utilities, Mailing, Mailing Info for a Case.



Note that you may copy and paste all email addresses for counsel from the lower part of this screen:¹



You may also find email addresses at

http://www.utahbar.org/forms/members_directory_search.html and http://www.lawyers.com/find_a_lawyer/name_search/

¹ Feature custom to District of Utah. Posted on Ed's Place.