

# Docket-Online® 2.0 – Clients E-Serve and Case Document Overview

The Docket-Online® Document / Record Library offers the ability to search file content and download PDF files of all posted Records. Depending on the subscriber's password level access, a Docket-Online® portal may contain multiple client, case or matter libraries.

## How to:

### Login

1. [www.Docket-Online.com](http://www.Docket-Online.com)
2. There are two login screens; use the left side for Client Login.
3. Type your **Login ID** and assigned **Password**. Passwords are CASE SENSITIVE
4. Leave the **Privilege Code** field blank.



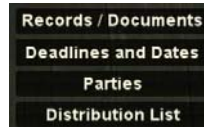
Figure 1: Docket Online Login Screen.

### Case / Matter Folders

1. Each client has at least two file assignments. The first folder contains copies of the fee agreement with the firm, copies of attorney fee billings, and other records which are not case or matter specific.

### Active Button Selection

1. Four tabs exist to the right of each File.



2. Clicking ONCE on **Records / Documents** tab displays a list of all available documents and Records. Records are sorted with the most recent posting listed at the top. Click ONCE on the tab again to CLOSE this window.
3. Clicking ONCE on **Deadlines and Dates** tab displays a list of critical dates or activities which are relevant to the pending case file or matter. Click ONCE on the tab again to CLOSE this window.
4. Clicking ONCE on **Parties** tab displays a list of the various Attorneys or other key contact individuals associated with a particular file. If you are not listed and want others to know of your involvement in the case for future reference, contact Guy W. Bluff. Click ONCE on the tab again to CLOSE this window.
5. Clicking ONCE on **Distribution List** tab displays a list of all e-mail addresses included in notification of a new Record posting. Click ONCE on the tab again to CLOSE this window.

## How to:

### View Records / Documents

1. Click ONCE on **Records / Documents** tab.
2. A list of available Records will appear.

## Tip ↓

By default, Records are sorted according to the **Date Posted** column. To sort by **Date Signed**, click on the ▲ or ▼ arrow buttons (in grey) above that column.

## How to:

### Searching for Records / Documents

1. Type search terms in the grey *Search* text boxes above each column.



Figure 2: The Search text box.

2. When searching for documents in a particular year or month, use YYYY-MM format.

## Tip ↓

Do not type multiple words in a single grey Search box. If searching for a particular letter, type the year and month above **Date Signed** and the last name of the Author above **Document Title**.

**How to:**

## Download/Open a Record / Document

1. Once the Record has been located, click on the PDF icon to download the file to your computer.



2. If a Record has multiple PDF icons shown, each file must be downloaded separately.

**Tip ↓**

Motions typically have multiple exhibits attached. Individual PDF files (one for the Motion and then sequentially thereafter for each attached exhibit) are created at the time of uploading.

**How to:**

## Upload a New Document

1. In the upper left corner of the window, click the **Upload New Document** icon.



2. Click the **Start** button, a new window will appear showing files on your computer.

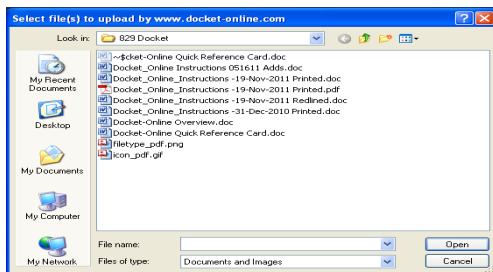


Figure 3: Computer Files for Uploading.

3. Select the desired file for upload, and then select the **OPEN** button.

4. Repeat with **Attach another file** as necessary, then **Proceed to Input Screen**.
5. In the **Client / Matter** field, select the appropriate folder in which to post the Record(s).
6. Give a descriptive **Document Title** for the Record, e.g. Pay Application #9a; Payroll Records for WE 11/13/2011; Notice of Weather Delay.
7. **Date Signed** should be changed to reflect the date the Record was actually signed, using the calendar feature provided.
8. Tab through the next fields, in order. Each has a pull down list of available options. In the **Party Filing** field select your company or name from the pull down list.
9. In **Party Responding** field, leave blank or select the most appropriate name from the list.
10. **Class of Document** is typically **Client Documents** or **Financial**.
11. In the **Privilege** field, select **No** or **Attorney-Client**. Leave the Privilege Code field blank.
12. Type **Your Name** and **Your E-Mail** in the appropriate boxes. (This is important so that if the firm has a question regarding a particular Record Posting we can contact the correct person).
13. Leave the next four fields blank (**Motion Exh #**, **Depo Exh#**, **Trial/Arbit Exh #**, **Docket #**)
14. **Document Author** should be the actual name of the individual signing or otherwise preparing the Record.
15. Leave **Distribute?** with the selection marked **NO**. New Record postings automatically appear in Guy W. Bluff's electronic in-box. If a Record should be reviewed immediately, send an e-mail or call advising of the new filing.

16. If there is any specific information or comments you want to add for Mr. Bluff's consideration about the Record, type this out in the **Notes** field (last box on the screen). Notes typed here will be available for review by Mr. Bluff at the time of his Record review.
17. Once the Record is complete; review your work prior to clicking the **Submit** button.

## Time Outs

To protect your site from access by unwanted parties, Docket-Online® sessions time-out if left inactive for more than ten minutes.

**IMPORTANT:**

For additional support or after-hours assistance, call 602-885-6007 or e-mail [guywbluff@gmail.com](mailto:guywbluff@gmail.com)

**IMPORTANT Notice:**

There may be certain Records in which the file may not open as a PDF. These documents are file types that will not open in the new document viewer and will need to be saved locally in order to open them with the native application.

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