Docket-Online© 2.0 – Parties & Attorneys
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
2. There are two login screens; use the left side for Party / Attorney Login.
3. Type your **Login ID** and assigned **Password**. Passwords are CASE SENSITIVE
4. Leave the **Privilege Code** field blank.
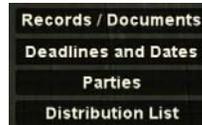

Figure 1: Docket Online Login Screen.

Case / Matter Folders

1. A typical Party login will produce a single case folder. If related cases are pending in various jurisdictions, a separate folder generally exists for each matter.

2. Select the appropriate case folder to view all available records.

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. Click ONCE on the tab again to CLOSE this window.

Tip ↓

If you are not listed and want others involved in the case to know of your involvement, select the Add Party tab. An e-mail will be sent to system administrator and once verified, the new party or attorney will be added to the case file.

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.

Tip ↓

Verify the Distribution List prior to Uploading New Records. Add any additional recipients as appropriate.

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 formal.

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.

If searching for a particular Motion or Exhibit, try using a specific keyword which would likely be found in the title and select the Document Class where it would most likely be filed.

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.

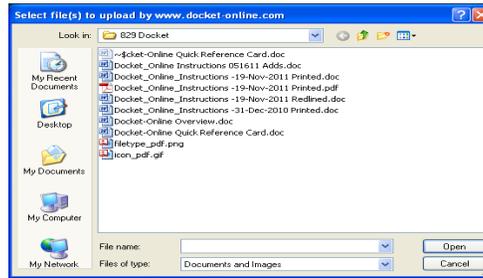

Figure 3: Computer Files for Uploading.

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.

Tip ↓

Select files in the order they should be available for viewing in the final Record posting.

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.

Tips ↓

a. Reflect the Status of a Record in Brackets [ ] e.g. [Proposed] Order Extending Time; [Draft] Settlement Agreement [Revision 2]; [Recorded] Deed of Trust and Assignment of Rents

b. Consider using descriptive Keywords for later searches in Parenthesis ( ).

7. Date Signed should be changed to reflect the date the Record was actually signed using the calendar feature provided. If the Record bears multiple dates, provide a note to the Audit Clerk for addition during the verification and review process.

8. Tab through the next fields, in order. Each has a pull down list of available options. In the Party Filing field select your client or name from the pull down list.

9. In Party Responding field select your client or name from the pull down list.

Tip ↓

If the Record is not party specific, leave this field blank or select All Parties.

10. Class of Document is used to designate the applicable backer or subfolder where the Record would typically be filed if using a physical filing system. There are 9 Classes available.

Client Documents
Correspondence
Court Orders
Discovery
Exhibits
Financial
Pleading
Research
Transcripts - Testimony

11. Select the appropriate Type of Document the pull down list.

Tip ↓

The list of available document types is extensive. Common document types are sorted by major class (e.g. Motion, Notice) and then by sub-class (e.g Motion – Summary Judgment, Notice – Deposition).

12. In the Privilege field, select No (which makes the Record available for viewing to all Parties) or another applicable privilege. Selecting any other Privilege will limit future access to the specific password utilized.

13. The Privilege Code field should be left blank. Typing in a pass code here will permit future access for this Record to only those users who

login with the proper code at the main login screen.

Tip ↓

Use a common Record Privilege Code for each file to permit viewing of all coded Records and avoid multiple logins.

14. Type Your Name and Your E-Mail in the appropriate boxes. (This is important so that if the Docket-Online© Audit Clerk has a question regarding a particular Record posting they can contact the correct person).

15. Exhibit References: Motion Exh #, Depo Exh#, Trial/Arbit Exh # are available to provide specific information for a Record if necessary. See Docket-Online Help for detailed instructions and hints for using these fields.

16. Docket # is useful for providing a cross reference to the Index of Record on Appeal; for identifying the Form Set assigned by AZTurboCourt; or for cross referencing to the Document Number assigned by PACER's CM/ECF electronic filing system.

17. Document Author should be the actual name of the individual signing or otherwise preparing the Record.

18. Distribute? Defaults with the selection marked NO. Change to YES to send a copy of the new Record posting to all e-mail addresses listed in the Distribution List.

Tip ↓

Verify the Distribution List prior to starting the upload process. Add any additional recipients as appropriate.

19. Distribution Message: If there is specific information, messages, or comments to be provided to the recipients type it out here (applies only when Distribute? has been marked YES. Messages typed here will appear in the confirming e-mail sent to all recipients.

20. Notes to Docket-Online Audit Clerk: Use to communicate specific Record instructions to the Audit Clerk. Notes typed here to not appear in the confirming e-mail sent to all recipients.

Tip ↓

If a Record is signed by multiple individuals, should be searchable by more than one date, involves multiple Party Filing / Party Responding provide the information here with specific instructions on how the Record should be updated.

21. Once the Record is complete; review your work prior to clicking the Submit button.

Time Outs

To protect the 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 Legal.Docket@gmail.com .