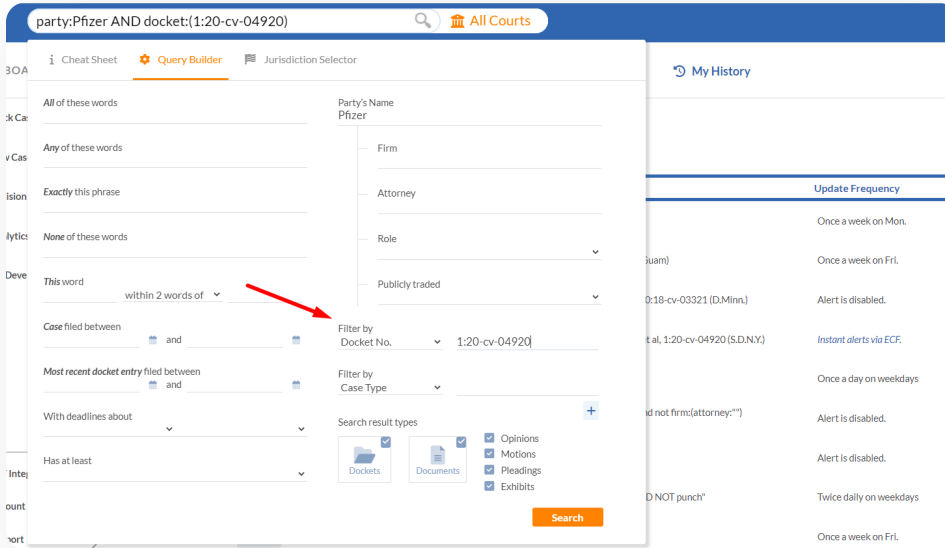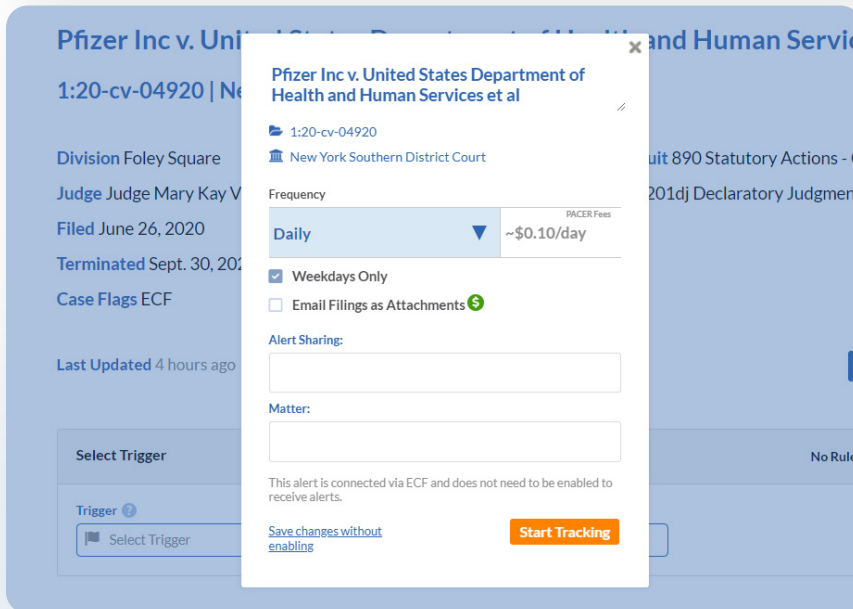# Quick Start Guide

Find your Case

- Click into the *search bar*
- From the **Filter** dropdown, select **Docket**, enter docket number

> **Optional:** Add search criteria, e.g.,
> (+ party) (+ judge) (+ keyword)

- Deselect **Documents**
  - » By default, Docket Alarm searches both docket sheets, and the pleadings' underlying text
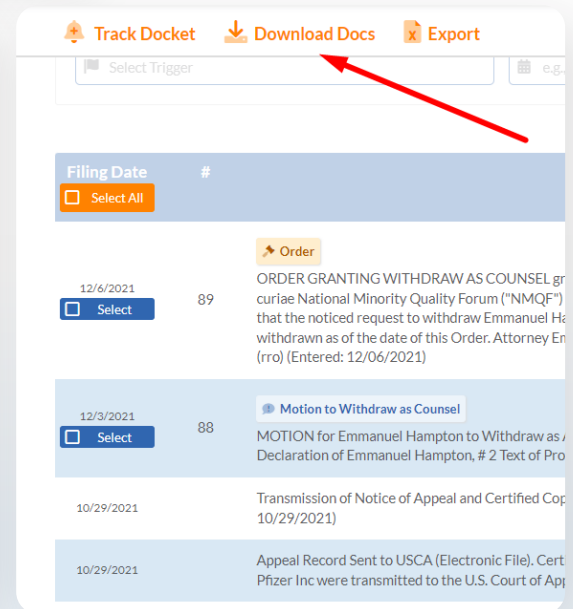
Click Search

Track a Case

- Click into a docket from the case results
- Click **Track Docket** at the top of the case
- Select the **frequency** of the alert
- Use the **Alert Sharing** field to send to other users within your account
- Group and organize alerts with the **Matter** field
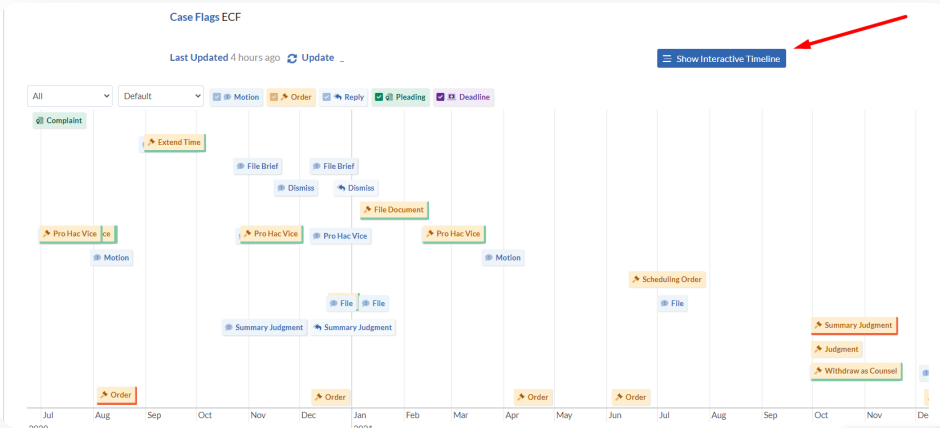
Click Start Tracking

Integrate Your ECF

- Add your ECF credentials to convert these ECF alerts into shareable, user-friendly, realtime alerts, and also save on PACER fees.
- Click the ECF Integration Setup button on the Dashboard, then input your credentials.
- Alerts are setup automatically, and displayed in blue italics.
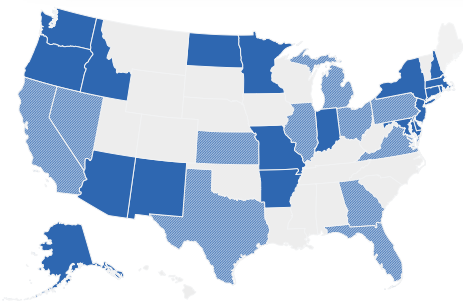
Bulk Download Case Documents

- Click **Download Docs** on the top of the case
- Check the box for the documents to be downloaded
- Click **Select All** to check all documents to be downloaded
- Click **Download**

Interactive Pleading Timeline

- Shows everything in a case that matters

- To view the case timeline, click **Interactive Pleading Timeline**

- To search similar motions

  » Hover over the pleading tag

  » Select search criteria
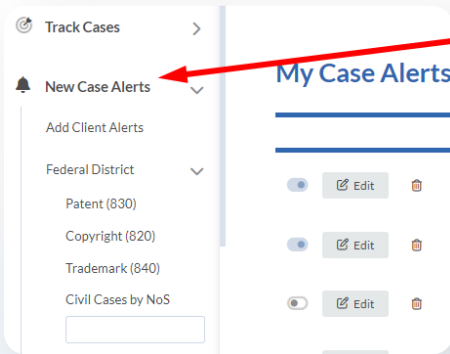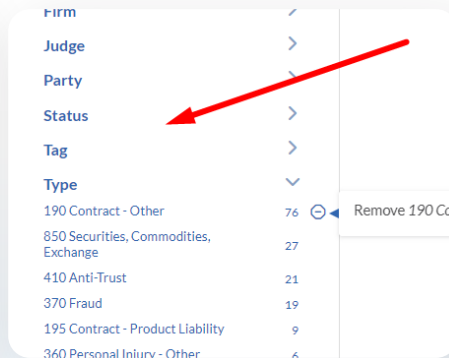
Click Search

Coverage

- **State Court Coverage:** 34 States and growing

- **Intellectual Property Courts:** Full coverage

  » PTAB, TTAB, ITC

  » Patent and Trademark Prosecution History (PAIR, TSDR)

- Agency courts including ITC, FTC, Orange Book, FERC, NLRB, Tax Court

- **Federal Courts:** Full Coverage

  » Access to all of PACER

  » Federal District, Appellate, and Bankruptcy

  » New civil case: Update in <24 hours

  » Existing cases: Real-time options available

  » Docket updates via case PACER RSS feeds
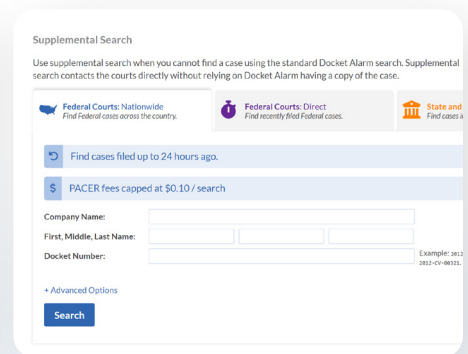
See www.docketalarm.com/coverage for details.

Set up Client Alerts

- On the *Dashboard*, click **New Case Alerts**
- Click **Add Client Alerts**
- Enter in Firm or Attorney information and click **Pull client list** and continue
- To add alerts by Client Name, click **Skip Step**
- Confirm and enter client names
- Click **Add Client Alerts**
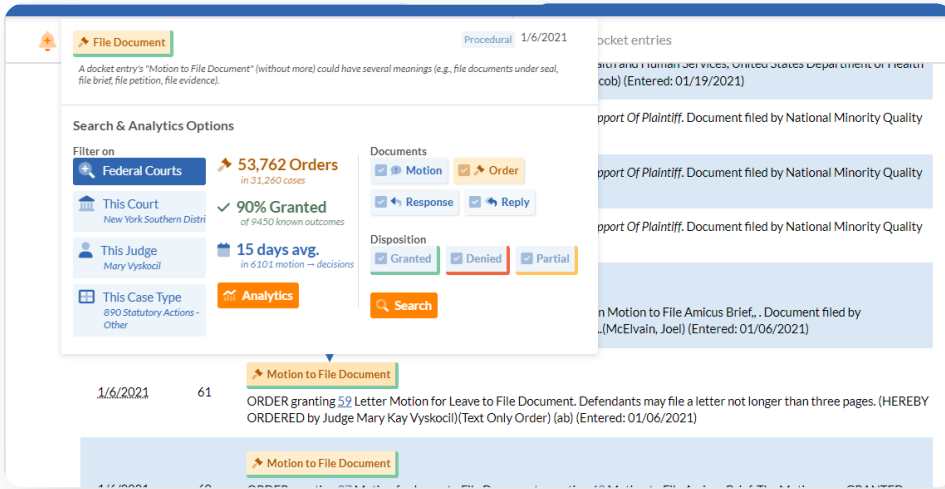- Select *Frequency* and click **Add**

Search the Database

To narrow your search, use the *Query Builder* and *Filters,* further refine your search by judge, firm, case type, motion type, etc.

- **Option 1:** Click the *search bar* to open the *query builder (see Find Your Case on page 1)*

  » To view all filters, click the *search bar* and click **Full Search Documentation**

  » Input desired information. To see more filter options, click **Filter By**

- **Option 2:** Run your search, and on the *results page*, use the filters on the left side of the screen

  » To add a *filter*, click the term

  » To remove a filter, click the **- (minus sign)** to the left of the term
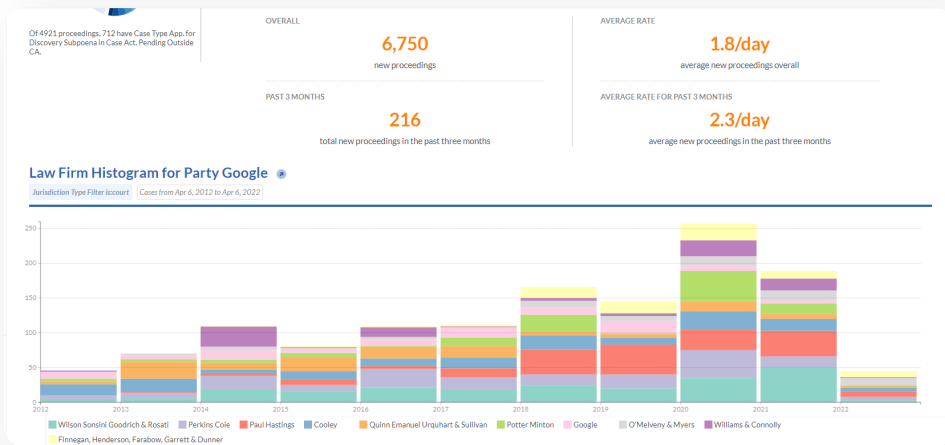
Supplemental Search

- **Unable to find a case?** Use the *Supplemental Search tool* to query the court directly, pulling the case into Docket Alarm.

- From the search bar, click the *Courts button*

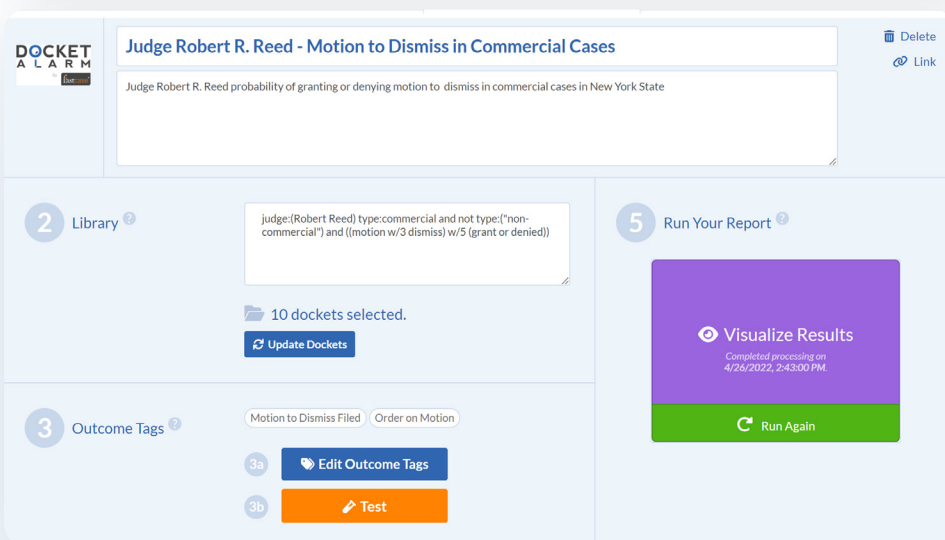- Then click **Supplemental Search**

Federal Analytics

- Docket Alarm has tagged 220+ motion/order/ pleading types to create Pleading Tags. With these Pleading Tags, you can analyze likelihood of winning motions — and how long it will probably take — before any particular court, judge, or case type.
- To access federal analytics from a docket, hover over any Pleading Tag
- Click **Analytics**
- To access federal analytics from the dashboard, on the left side, click Analytics
- Click **Federal Analytics**

Easy Analytics

- Run analytics on any party, judge, firm, or attorney across our entire database
- Answer questions like (1) which firms are clients using? or (2) what case types does a judge or firm work with most?
- To access **Easy Analytics**, on the dashboard's left side, click **Analytics**

Analytics Workbench

- Build and share customizable analytics with outcome tags across all Docket Alarm jurisdictions (e.g., federal courts, state courts, administrative agencies).
- To access the Analytics Workbench, on the dashboard's left side, click **Analytics**

Share Analytics with Clients

- Share a live link to any of Docket Alarm's analytics with anyone – even if they aren't a Docket Alarm user – through our **Embed** feature

- Whenever these links are opened, reports will re-generate with updated analytics

- To create a link to share, on the report's upper-right corner, click the **Embed** icon

- Click **Copy just this link**

- To save as a PDF, on the report's upper-right corner, click the **PDF icon**

Helpful Hints

- To access all analytics, on the Dashboard's left side, click the **Analytics button**

- **FILTER:** On the left side of the analytics, filter by date, representation type, jurisdiction type, court and state

- **LITIGATION ONLY:** To remove patent and trademark filings, under **Jurisdiction Type**, click the **All Litigation** filter

- **ISOLATE SECTION:** To view a section of the report as its own report, to the right of the heading, click the **Arrow Icon**

- **EXPORT:** To export a section of the report as Excel, click the **Export button**