

# Attorney Guide to Hyperlinking in the Federal Courts (for Corel WordPerfect users)

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## **Overview of Hyperlinking in Federal Court**

In the internet research world, hyperlinks are a standard way of “drilling down” for more detail or specific information. Just as all web pages contain links to other pages, cases downloaded from legal research services such as Westlaw or Lexis contain links to the cases, statutes, articles, or other sources cited within the opinion. The links allow immediate access by the reader to these referenced materials.

Attorneys can include links to cited law and CM/ECF filings in their briefs filed in CM/ECF, adding another level of persuasion to their writing. Hyperlinks in briefs and other court filings provide quick, easy, and pinpoint access to particular sections of a case, or to specific filings in the court’s record. The attorney can thereby highlight the precise issue presented, and the specific evidence and controlling or persuasive law the court should consider.

Hyperlinks in court filings are very beneficial for court chambers. Court submissions which include links to relevant case law and case filings are easy for chambers staff to review. The attorneys’ arguments can be immediately verified in the context of the relevant law. The judge or judicial clerk is able to read the text of the cited case law on one screen while reading the attorney’s brief on the other. And if a brief contains links to referenced exhibits, and even to specific pages within those exhibits, the judge or judicial clerk can access the relevant evidence without having to navigate through the CM/ECF record. Particularly when dealing with large and complex cases, links save chambers considerable time and effort. Links make it easy for the court to verify – and adopt – the positions taken by an advocate.

## Types of Permissible Hyperlinks

Subject to the court's local rules, the following types of hyperlinks are typically allowed in court documents.

<b>Internal Links</b>	For example, the Table of Contents located at the beginning of this Guide.
<b>Links to documents previously filed on CM/ECF</b>	The Defendant's di <a href="https://ecf.cacd.uscourts.gov/doc1/031117463106">https://ecf.cacd.uscourts.gov/doc1/031117463106</a> en thoroughly prior orders, (Filing Nos. <a href="#">18</a> , <a href="#">24</a> , <a href="#">26</a> ), and the factual findings wit incorporated herein by reference. As more specifically describe
<b>Links to attachments and exhibits being filed with your brief</b>	03/16/2012 <a href="#">4</a> BRIEF in support of defendant's motion to stay and to compel arbitration, <a href="#">3</a> , by Attorney Carolyn Gunkel on behalf of Defendant Pioneer Hi-Bred International, Inc. (Attachments: evidence in support # <a href="#">1</a> Affidavit of Allan Brax, # <a href="#">2</a> Exhibit Pioneer terms and conditions sheet, # <a href="#">3</a> Exhibit Plaintiff's 2011 income invoice, # <a href="#">4</a> Exhibit Arbitration Provision)(Zwart, Cheryl) (Entered: 06/22/2012)
<b>Links to case and statute citations</b>	<p>For example:</p> <p><b>Westlaw,</b></p> <p>by the attorney-client privilege or the work product doctrine.  s, <a href="#">2009 WL 4949959</a>, <a href="#">2009 U.S. Dist. LEXIS 121753</a> (D. Colo.  : 502: <a href="http://web2.westlaw.com/find/default.wl?rs=WLW10.06&amp;ifm=NotSet&amp;fn=_top&amp;sv=Split&amp;cite=2009+WL+4949959&amp;vcr=2.0&amp;rp=%2ffind%2fdefault.wl&amp;mt=Westlaw">http://web2.westlaw.com/find/default.wl?rs=WLW10.06&amp;ifm=NotSet&amp;fn=_top&amp;sv=Split&amp;cite=2009+WL+4949959&amp;vcr=2.0&amp;rp=%2ffind%2fdefault.wl&amp;mt=Westlaw</a>  when a "subject-matter waiver" occurs due to an intentional or</p> <p><b>Lexis,</b></p> <p>by the attorney-client privilege or the work product doctrine.  s, <a href="#">2009 WL 4949959</a>, <a href="#">2009 U.S. Dist. LEXIS 121753</a> (D. Colo.  : 502: <a href="https://www.lexis.com/research/retrieve?_m=9bb0a60fca07b454655d5b593fccc60f&amp;cscvc=le&amp;cform=byCitation&amp;_fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-z5kAI&amp;_md5=dbca62caac84f829e0e4d0ec37b92e8d">https://www.lexis.com/research/retrieve?_m=9bb0a60fca07b454655d5b593fccc60f&amp;cscvc=le&amp;cform=byCitation&amp;_fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-z5kAI&amp;_md5=dbca62caac84f829e0e4d0ec37b92e8d</a>  when a "subject-matter</p> <p><b>or court websites.</b></p> <p>A party has been fraudulently joined if there is no reasonable basis for predicting that the state law <a href="http://www.ca8.uscourts.gov/opndir/13/04/121892p.pdf">http://www.ca8.uscourts.gov/opndir/13/04/121892p.pdf</a> based upon the facts involved. <a href="#">Bradley Timberlat</a> <a href="#">Click to follow link</a> <a href="#">Lumber Co., No. 12-1892 (8th Cir. April 8, 2013)</a>.</p>

## Creating a Hyperlinked Table of Contents

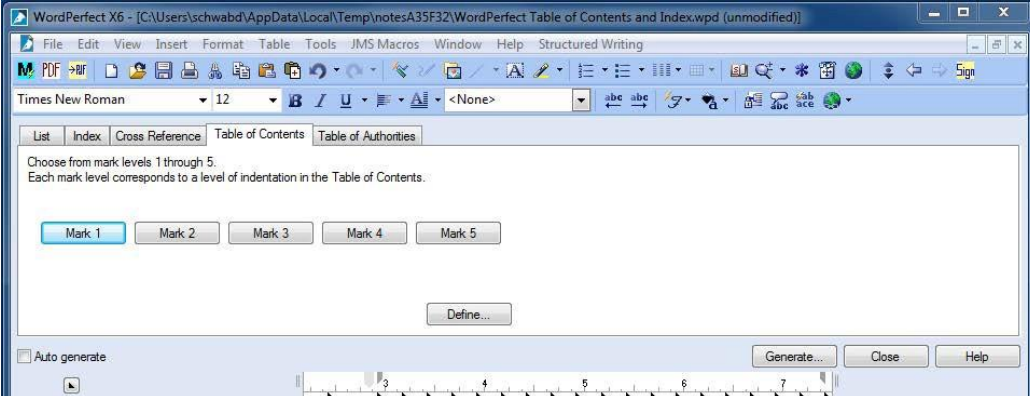
A table of contents in a WordPerfect document can include internal hyperlinks for navigating the document. The following steps are used to create a Table of Contents in a WordPerfect document.

- Step 1: Mark all of the items that belong in the list.
- Step 2: Insert a page break before the list and add a title or page header.
- Step 3: Define the format and position for the list.
- Step 4: Generate the list and cross-references.
- Step 5: Edit the generated list.

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### Marking Table of Contents Entries

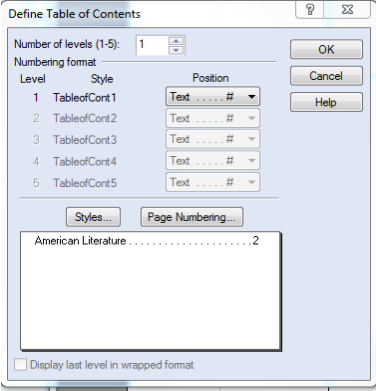
Follow the steps below to mark entries for a table of contents (TOC).

STEP	ACTION
1	<p>On the <b>Tools</b> menu, point to <b>Reference</b> and then <b>Table of Contents</b>.</p> <p><u>Note:</u> The Table of Contents Feature Bar appears.</p> 
2	<p>Select the block of text to include in the table of contents.</p> <p><u>Note:</u> This is best done using Reveal Codes, being careful with any formatting codes.</p>
3	<p>Click the <b>Mark</b> button on the Feature Bar to choose the indentation level you want for the selected text. There are 5 Mark buttons which correspond to five levels of indentation. The leftmost position in the table of contents is level 1.</p> <p><u>Note:</u> WordPerfect will mark the selected text with [Mrk Txt ToC] codes which you can see in Reveal Codes.</p>

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### Defining a Table of Contents

Follow the steps below to define the position and format for a table of contents.

STEP	ACTION								
1	Turn on the Table of Contents Feature Bar (Tools→Reference→Table of Contents)								
2	Move the cursor to the point where the table of contents should appear. <u>Note:</u> To start the table on a new page, press Ctrl+Enter. Press ↑ to move the cursor before the [HPg] code. Enter a title if you'd like one, such as <b>Table of Contents</b> , and press Enter.								
3	Click the Define button on the Feature Bar to open the <b>Define Table of Contents</b> dialog box. 								
4	Use the following options to customize your table. <table border="1" data-bbox="412 1087 1382 1394"> <tr> <td data-bbox="412 1087 727 1167"><b>Number of Levels</b></td> <td data-bbox="727 1087 1382 1167">Allows you to choose how many levels to display in the table of contents, from 1 to 5.</td> </tr> <tr> <td data-bbox="412 1167 727 1247"><b>Position</b></td> <td data-bbox="727 1167 1382 1247">Allows you to choose where to place page numbers in each level.</td> </tr> <tr> <td data-bbox="412 1247 727 1327"><b>Styles</b></td> <td data-bbox="727 1247 1382 1327">Allows you to customize the appearance of the text in each level.</td> </tr> <tr> <td data-bbox="412 1327 727 1394"><b>Page Numbering</b></td> <td data-bbox="727 1327 1382 1394">Lets you customize the page numbering format.</td> </tr> </table>	<b>Number of Levels</b>	Allows you to choose how many levels to display in the table of contents, from 1 to 5.	<b>Position</b>	Allows you to choose where to place page numbers in each level.	<b>Styles</b>	Allows you to customize the appearance of the text in each level.	<b>Page Numbering</b>	Lets you customize the page numbering format.
<b>Number of Levels</b>	Allows you to choose how many levels to display in the table of contents, from 1 to 5.								
<b>Position</b>	Allows you to choose where to place page numbers in each level.								
<b>Styles</b>	Allows you to customize the appearance of the text in each level.								
<b>Page Numbering</b>	Lets you customize the page numbering format.								
5	Click <b>OK</b> to return to the document window. The message << <b>Table of Contents will generate here</b> >> will appear at the cursor position.								
6	To ensure proper page numbering, move the cursor to the top of the first numbered page (the first page that follows the table of contents). From the <b>Format</b> menu, click <b>Page</b> , then <b>Numbering</b> and click the <b>Set Value</b> button.								
7	Click the <b>Page</b> tab, change Set Page Number to <b>1</b> , and click <b>OK</b> .								

## Generating Lists

Once you've marked your lists, generating them is easy. Follow the steps in the table below to generate the table of contents.

STEP	ACTION
1	Click the Generate button on the Feature Bar. Or from the <b>Tools</b> menu click <b>Reference</b> , then <b>Generate</b> .
2	<p>If you want, select or clear the following options:</p> <p><b>Save Subdocuments:</b> WordPerfect saves changes to subdocuments of the master document being generated.</p> <p><b>Build Hyperlinks:</b> WordPerfect generate and saves hyperlinks in your document.</p>
3	<p>Click <b>OK</b>.</p> <p><b>Warning:</b> WordPerfect does not update the lists automatically when you change the document. Be sure to regenerate the list after making changes.</p>

## Editing Lists

If you decide to edit a generated list, pay special attention to the codes that define the list and its contents. You'll typically see codes like these after you generate a list.

[Def Mark][Gen Txt].....list goes here....[Gen Txt]

Each list begins at the [Def Mark] code that WordPerfect inserts when you define the list. The generated list appears between the [Gen Txt] codes. Each time you generate a list, WordPerfect will replace all of the text between the sequence of codes. You should, therefore, keep the following in mind.

- Always place list titles and page headers before the [Def Mark] code, not after it, or between the [Gen Txt] codes. (Otherwise they will disappear when you regenerate the list)
- If you edit the generated list only, your changes will be lost when you regenerate the list. Therefore it is best to edit the references within the main document and then regenerate the list.

When the entire document is complete, using MS Word, **Save** the document as a PDF or **Create PDF** in accordance with the instructions in this Guide.

**Note: Do not Print to PDF. All active links in your Word document become inactive in PDFs created using Print to PDF.**

## Drafting Documents to Include Links to CM/ECF

If you intend to include CM/ECF links in a document you are creating, use a consistent citation format that cites the CM/ECF filing number along with the CM/ECF page number. For example:

1 Download the filings from CM/ECF, and save them in your computer. **Reminder:** you can download a document from CM/ECF one time for free when you receive the notice of electronic filing. Charges apply to each additional download of the same document.

2 Documents downloaded from CM/ECF will include a header that identifies the CM/ECF filing number and the page numbers within that filing.

  
Doc # 13-1 Filed: 03/08/13 Page 1 of 4 -

3 When drafting your brief, cite to the CM/ECF filing number and CM/ECF page number to which you are citing. For example:

Assume you are citing to the following page of evidence.

Doc # 13-1 Filed: 03/08/13 Page 3 of 4

The citation within the brief could appear as follows:

The Plan included a Trust Agreement. (Filing No. 13-1, at CM/ECF p. 3).

### Gathering Links for Citations to the Record

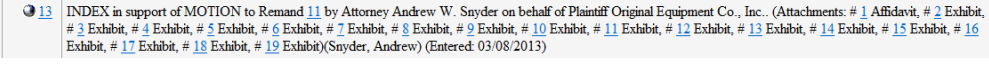
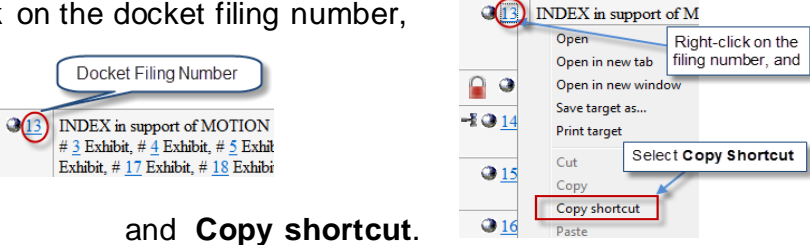
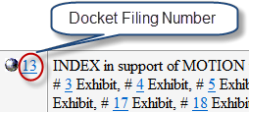
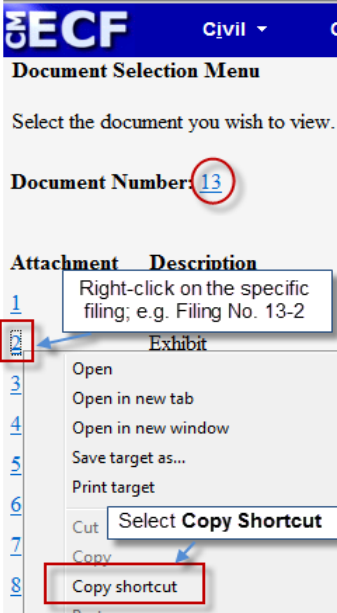
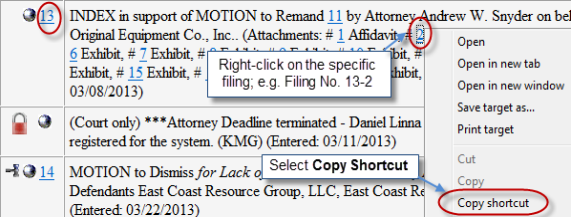
Now that the filing numbers and associated page numbers are in the brief, you can manually add links to the electronic record.

To obtain the url for the document without incurring a PACER charge:

1 Collect and save on your computer the notice of electronic filing (NEF) for all filings in the case.

2 When you later need the link for the document cited,  
--retrieve the NEF for that document,  
--right-click on the **Document Number**, and  
from the drop-down menu that appears,  
Select **Copy Shortcut**.

To obtain the url for the document from the PACER docket sheet (PACER chargeapplies):

STEP	ACTION
1	<p>Open the CM/ECF docket sheet and scroll to the cited docket filing.</p> 
2	<p>If linking to the <b>main</b> CM/ECF filing, <b>right-click</b> on the docket filing number, and <b>Copy shortcut</b>.</p>  <p>If linking to a <b>sub-file</b> within a CM/ECF filing number:</p> <p><u>Either</u>:</p> <p>Click on the docket filing number;</p>  <p>A window will open which lists all sub-filings for that docket filing number.</p>  <p>Place your cursor over the link for the document you are citing, <b>right-click</b>, and from the drop-down menu that appears, select <b>Copy Shortcut</b>.</p> <p><u>Or</u></p> <p><b>Right-click</b> on the sub-filing number in the docket text and, select <b>Copy Shortcut</b>.</p> 



## Formatting the appearance of the links inserted

Before inserting links into a document, you may choose how those links will appear in the final document. For example, do you want them to appear:

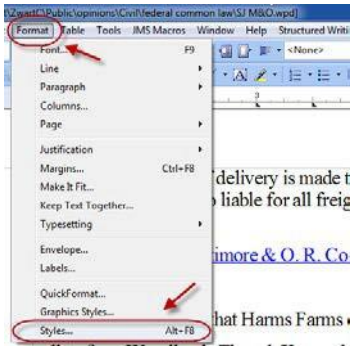
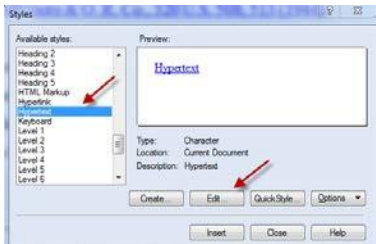
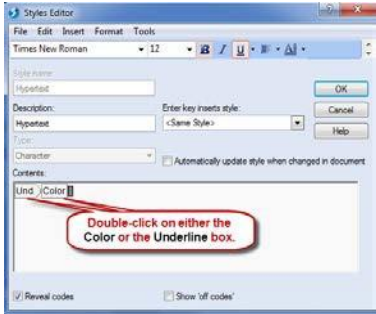
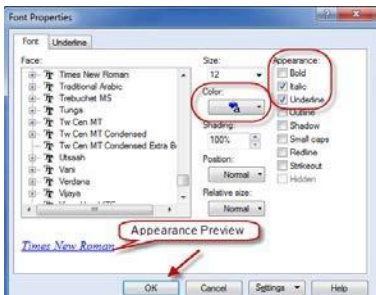
[blue and underlined](#),

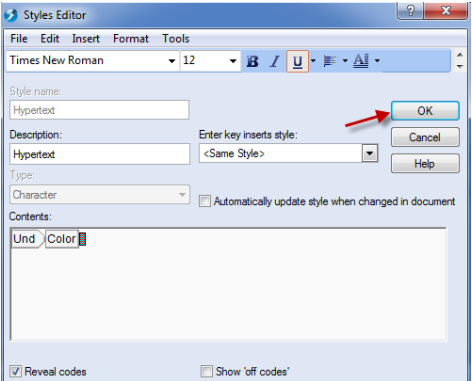
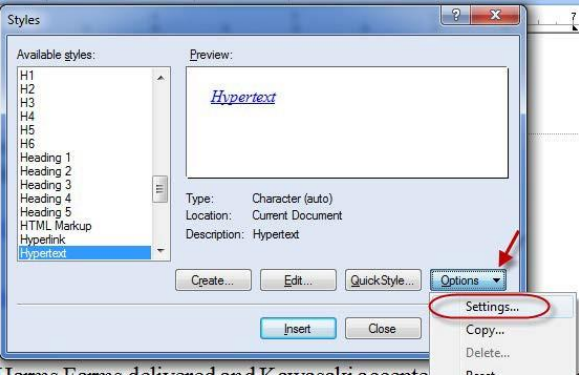
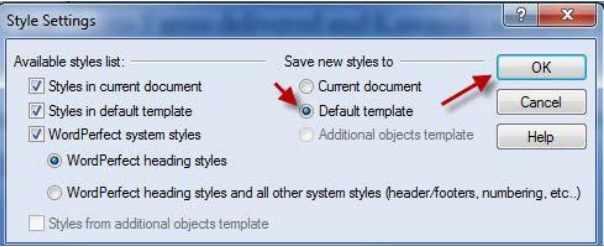
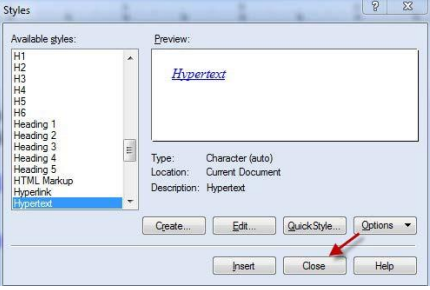
**bold and black**,

*black and italicized*, or

some other appearance?

To select the appearance of the links in your document:

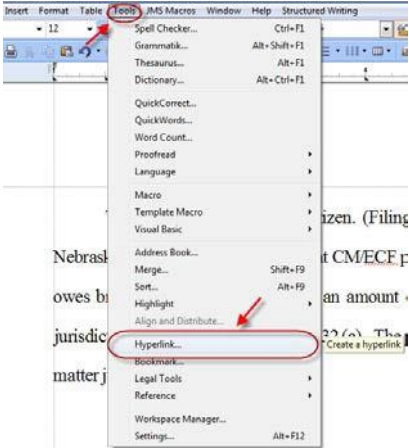
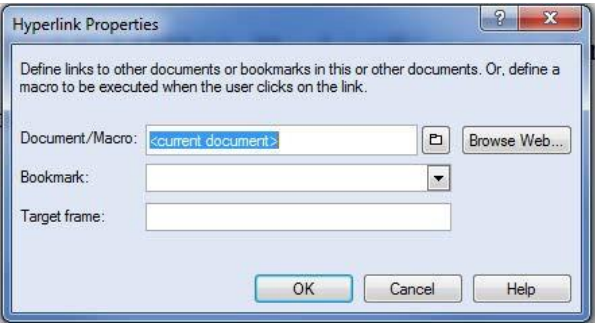

STEP	ACTION
1	<p>Open a WordPerfect document which includes hyperlinked text.</p> <p>From <b>Format</b> on the menu bar,</p> <p>Select <b>Styles</b>.</p> 
2	<p>In the <b>Styles</b> box, scroll to and select <b>Hypertext</b>. Click <b>Edit</b>.</p> 
3	<p>The <b>Styles Editor</b> box will open.</p> <p>Double-click on a Reveal Codes command in the Contents box; e.g. on <b>Und</b> or <b>Color</b>.</p> 
4	<p>The <b>Font Properties</b> box will open.</p> <p>Select the desired <b>Color</b>.</p> <p>Select the desired <b>Appearance</b>.</p> <p>Click <b>OK</b>.</p> 



STEP	ACTION
5	<p>You will return to the <b>Styles Editor</b> box.</p> <p>Click <b>OK</b>.</p> 
6	<p>You will return to the <b>Styles</b> box.</p> <p>If you want to set your changes as the hyperlink text format for every document,</p> <p>Click on <b>Options</b>, and from the drop-down that appears, Select <b>Settings</b>.</p> 
7	<p>In the <b>Style Settings</b> box, Select <b>Default Template</b>.</p> <p>Click <b>OK</b>.</p> 
8	<p>You will return to the <b>Styles</b> box.</p> <p>Click <b>Close</b>.</p> 

## Linking to CM/ECF Documents

### Inserting Links to Documents Previously Filed on CM/ECF

To manually add the links you have copied from the docket to the MS Word document you are drafting:

STEP	ACTION
1	In the brief, use your cursor to select the citation you want to link. The defendant is a Colorado citizen. (Filing No. 13-2, at CM/ECF p. 3).
2	From <b>Tools</b> on the menu bar, select <b>Hyperlink</b> . 
3	A <b>Hyperlinks Properties</b> dialog box will appear. Use the <b>Delete</b> key from the computer keyboard to remove <code>&lt;current document&gt;</code> . 
4	Right-click in the <b>Document/Macro</b> box. Select <b>Paste</b> . 

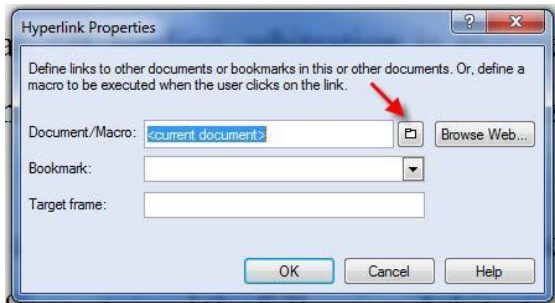
STEP	ACTION
5	<p>The link to the first page of the filing will appear.</p> <p><b><u>To link to the filing only, or to only page 1 of the filing, click OK.</u></b></p> <p>The link to the citation will be added in your brief.</p> 
6	<p><u>To link to the specific page number of a CM/ECF filing to which you are citing,</u></p> <p>In the address box, scroll to or place your cursor at the end of the link address.</p> <p>Add the following text: <b>?page=&lt;page number&gt;</b> . For example,</p>  <p>To link to page number 3 of a filing, add ?page=3. Click <b>OK</b> and the link to the page will be added to the citation in the brief.</p> <p><b>Note:</b> While the document remains in WordPerfect format, the link will go only to the first page of the document. But upon conversion to PDF, the PDF link will go to the specific page you cited.</p>
7	<p>Convert the brief to a PDF following the instructions below.</p>
8	<p>File the PDF version of the document in CM/ECF.</p> <p><b>Note:</b> It is <b>not</b> necessary to re-file or re-attach the documents to which you are linking to if they have been previously filed in CM/ECF.</p>

### Adding Links to Attachments to the Document Being Filed

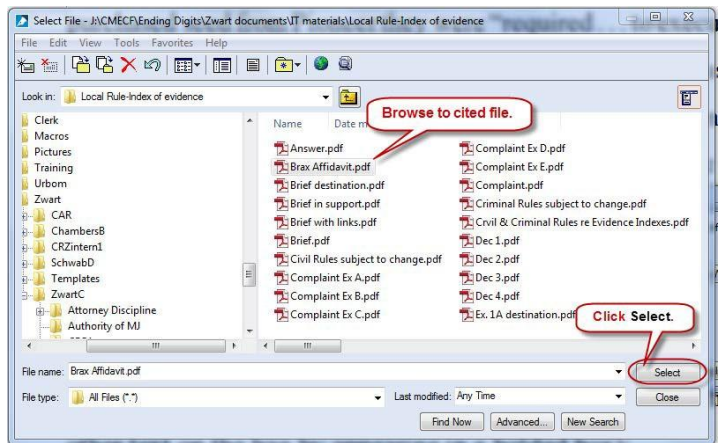
If a document cited in your brief has not previously been filed on CM/ECF, you may link to the document within your brief only if the document is filed as an attachment to your brief. Follow the steps below to add active hyperlinks to documents you will be filing as brief attachments in CM/ECF.

STEP	ACTION
1	Save all the documents you will cite to into a single folder in your computer. The documents must be in PDF format.
2	While drafting your brief, include the citations to the documents saved in your computer.
3	In WordPerfect, select the text to which a link will be added. and again putting Plaintiffs on notice that arbitration may be required for any seed disputes, the 2011 invoice stated that, “If binding arbitration is required (see bag), the place of arbitration will be Des Moines, Iowa.” <b>Brax Aff. ¶ 13</b> (emphasis added).
4	From the <b>Tools</b> menu, select <b>Hyperlink</b> .

5 A **Hyperlinks Properties** dialog box will appear. Click the folder button.

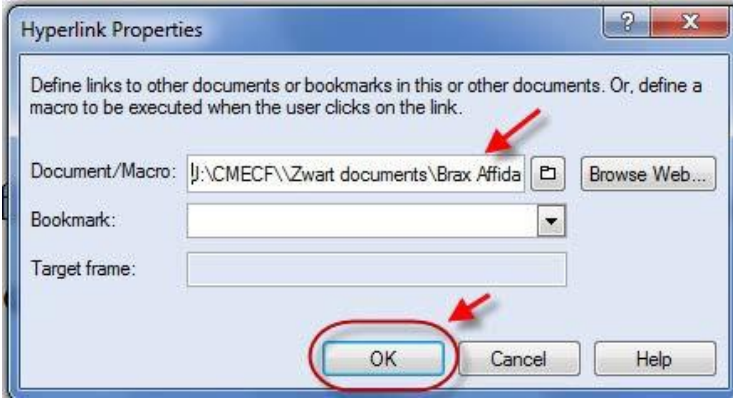



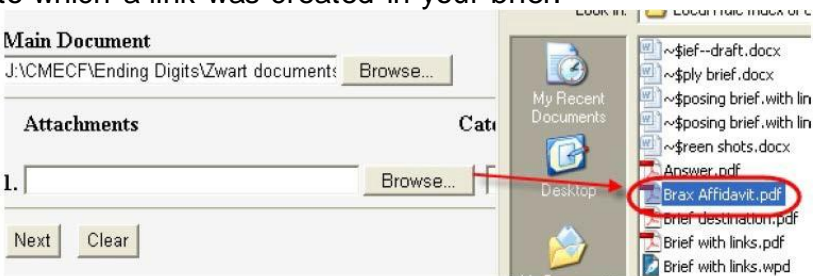

Browse to and select the saved file you want to link.



Click on the file. The name of the file will appear in the File name box. Click **Select**.

(**Note:** The file selected as the link must be in PDF format.)

STEP	ACTION
6	<p>The path to the file will appear in the <b>Document/Macro</b> field.</p> 
7	<p>A link to the file will be added to the text. If you hover over the link with your cursor, you will see the link address.</p> <p>and conditions sheet, and again putting Plaintiffs on notice that ar <a href="file:///A:\winfo\L.ned.circ8.dcn\data\cmecl\ending%20digits\zwart%20documents\vitmaterials\local%20rule-index%20of%20evidence\brax%20affidavit.pdf">file:///A:\winfo\L.ned.circ8.dcn\data\cmecl\ending digits\zwart documents\vitmaterials\local rule-index of evidence\brax affidavit.pdf</a> see</p> <p>for any seed disputes, the 2011 invoice stated that, “If binding a (see bag), the place of arbitration will be Des Moines, Iowa.” <a href="#">Brax Aff. ¶ 13</a> (emphasis added).</p> <p>Add links accordingly to all the citations in your brief.</p> <p><b>Note:</b> Specific page links can be added by following the directions in the previous section. Use the PDF page number, not a Bates number or footer page number, for the citation.</p>

STEP	ACTION
8	<p>File the brief and evidence as follows:</p> <p>a Following the normal procedure for filing briefs on CM/ECF, browse to and select your brief with links as the main document.</p> 
	<p>b Browse to and select as an <b>Attachment</b> each PDF file to which a link was created in your brief.</p> 
	<p>c Using the drop-down list, select the type of document attached, and provide a written description of the document. (<b>Note:</b> From the court's perspective, the written description you provide in CM/ECF can become, automatically, the name of a PDF bookmark in the downloaded file).</p>  <p>Repeat the foregoing steps until all cited evidence is filed as an attachment to your brief.</p>
	<p>d When all evidence attachments have been added to the brief, click <b>Next</b> and complete the remaining steps for filing the brief on CM/ECF. Once filed, the links in the brief will link directly to the evidence filed of record with the brief.</p>

## Automated Links to Legal Citations

Links to legal citations can be added manually or, assuming the software is compatible with your computer and word processing software, by using automated linking software available through Westlaw or Lexis.

### Access to Linking Software

Tool	Cost	URL
Westlaw InsertLinks	Must purchase a West BriefTools subscription. Estimated cost: \$100/month for small firms; \$300 to 500/month for larger firms (10 licenses)	<a href="http://legalsolutions.thomsonreuters.com/law-products/solutions/brief-tools?searchterms=brief+tool">http://legalsolutions.thomsonreuters.com/law-products/solutions/brief-tools?searchterms=brief+tool</a>
Shepard's Links 2008	Lexis is currently not selling a software subscription which will insert links to documents that will remain active upon conversion to PDF. The last version of such software was created in 2008 and can be downloaded from the Lexis/Nexis website for free.	<a href="http://support.lexisnexis.com/InDownload/record.asp?ArticleID=6056">http://support.lexisnexis.com/InDownload/record.asp?ArticleID=6056</a>  <b>Note:</b> The Shepard's BriefSuite dictionary is getting old and may not recognize some of the newer reporters. Its accuracy as a linking tool is inconsistent.
Lexis for Microsoft Office	This Lexis software product will add links for research and drafting purposes, but those links are lost upon conversion to PDF. Lexis is investigating the issue.	<a href="http://www.lexisnexis.com/en-us/products/lexis-for-microsoft-office.page">http://www.lexisnexis.com/en-us/products/lexis-for-microsoft-office.page</a>



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## Linking Software—Compatibility Information

The following graph outlines the compatibility of Shepard's Links 2008, West InsertLinks, and Lexis Links for Microsoft Office for inserting links into MS Word and WordPerfect documents with a Windows XP (SP3) 2GB Memory, Windows Vista (SP2) 4GB Memory, or Windows 7 – 4GB Memory computer.\*

	Shepard's Links 2008	Lexis for Microsoft Office	West InsertLinks
MS Word 2010		X**	X***
MS Word 2007		X**	X***
MS Word 2003	X		X***
MS Word 2000	X		
WordPerfect X6****			
WordPerfect X4 – X5			X
WordPerfect X3	X		X
WordPerfect 10 – 12	X		

\* The West and Lexis linking software programs cannot be used on Apple computers. Moreover, although Shepard's Links was not designed to operate on Windows Vista and Windows 7 (as reflected in the Lexis literature), it is working on these computer systems.

\*\* Lexis for Microsoft Office is being developed and tested. However, in its current stage of development, any links added by Lexis for Microsoft Office are being stripped out upon conversion to PDF. Lexis is investigating this issue.

\*\*\* Westlaw product information states InsertLinks is compatible with both 32- and 64-bit Microsoft Word. However, while it works well with 32-bit Word, InsertLinks is not fully compatible or useful with 64-bit Word.

\*\*\*\* West currently has no linking software compatible with WordPerfect X6. West indicates it may develop and release this product during the summer of 2013.

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## Westlaw InsertLinks

InsertLinks is a Westlaw computer software program which scans Microsoft Word or Corel WordPerfect<sup>1</sup> documents to locate legal citations, and then automatically inserts hyperlinks to the Westlaw internet address (url) for those citations into the word processing document.

See attached InsertLink example-W ord

InsertLink example-W ordPerfect

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## Installing West InsertLinks

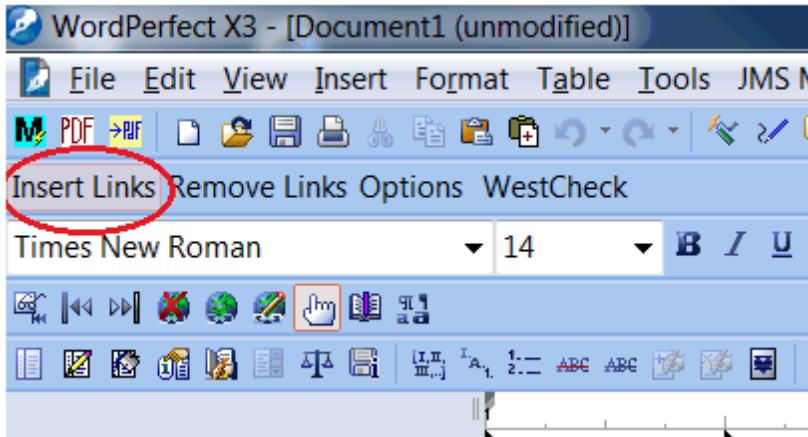
InsertLinks is part of the West BriefTools suite, and a BriefTools subscription is required in order to use this software.

- The current West BriefTools product is Version 2.7.2039, which was updated on December 10, 2012.
- The attached BriefTools Software Download instructions outlines the system requirements and provides instructions on how to install West BriefTools.

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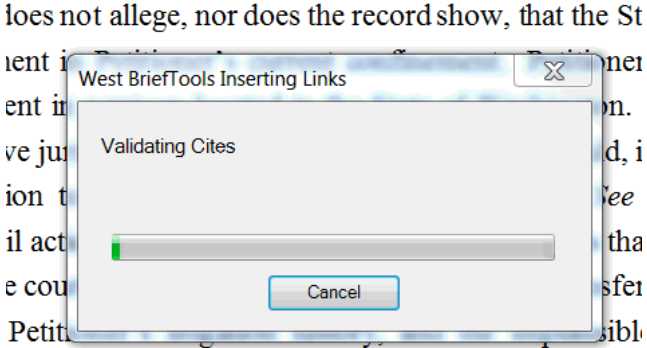
## Using West InsertLinks

Once InsertLinks software is installed, Westlaw links can be installed automatically in WordPerfect documents using the following steps:

STEP	ACTION
1	<p>With the WordPerfect document to which you are adding links open on your screen:</p>  A screenshot of the WordPerfect X3 software interface. The window title is "WordPerfect X3 - [Document1 (unmodified)]". The menu bar includes "File", "Edit", "View", "Insert", "Format", "Table", "Tools", and "JMS M". The "Insert" menu is open, showing options: "Insert Links", "Remove Links", "Options", and "WestCheck". The "Insert Links" option is circled in red. Below the menu bar, the font is set to "Times New Roman" and the size is "14". Other interface elements like a toolbar and a status bar are visible. <p>Select <b>Insert Links</b> from the menu bar.</p>

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<sup>1</sup> Currently, InsertLinks is not compatible with, and cannot be used for, automatically inserting links into WordPerfect X6 documents. It does, however, work with prior versions of WordPerfect.

STEP	ACTION
2	<p>The InsertLinks software will begin searching the document for citations and inserting the appropriate links.</p> 
3	<p>The <b>Inserting Links</b> box depicted above will disappear when the process is complete and all links are installed.</p> <p>has been deemed to be an abusive litigant. He has been enjoined in a number of courts, and is a three-strikes litigant pursuant to <a href="#">28 U.S.C. § 1915(g)</a>. The PACER records reveal that Demos has filed at least 130 other habeas petitions.” <i>Demos v. United States Secretary of Defense</i>, C.A. No. 12-12398-PBS, 2013 WL 80167 (D. Mass. Jan. 3, 2013).</p>

## Shepard’s Links 2008

Shepard’s Links is a Lexis computer software program which scans Microsoft Word or Corel WordPerfect<sup>2</sup> documents to locate legal citations, and then automatically inserts hyperlinks to the Lexis internet address (url) for those citations into the word processing document.

**Reminder:** Although free, Shepard’s links has not been updated since 2008 and provides inconsistent auto-linking results.

## Installing Shepard’s Links

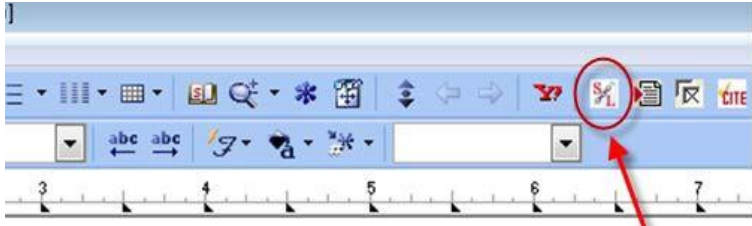
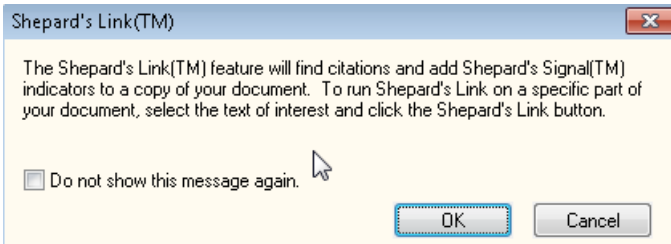
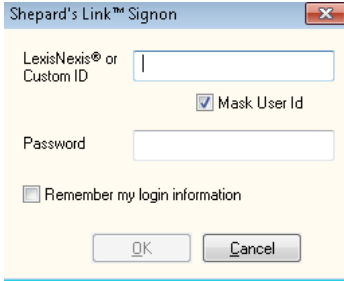
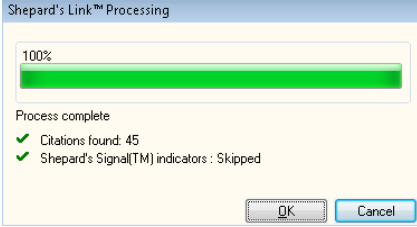
Shepards Links is part of the Shepard’s BriefSuite.

- Shepard’s BriefSuite has not been updated since 2008.
- The attached BriefSuite software download instructions provides a step-by-step description on how to install Shepard’s BriefSuite.

<sup>2</sup> See compatibility graph above.

## Using Shepard's Links

Once Shepard's Links software is installed, Lexis links can be installed automatically in WordPerfect documents using the following steps:

STEP	ACTION
1	<p>Click on the Shepard's Link button, circled in the screenshot below</p> 
2	<p>Click the checkbox (optional) and click <b>OK</b>.</p> 
3	<p>Click <b>Cancel</b>. Logging in is optional.</p> 
4	<p>Click <b>OK</b>.</p> 
5	<p>The new document with the hyperlinks opens in a new tab. Save the document as a PDF as described in these instructions.</p>

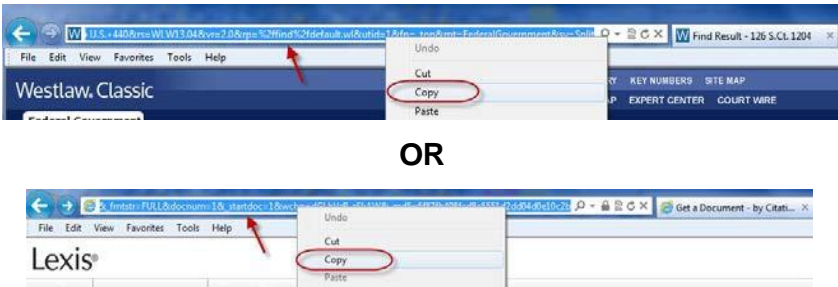
## Manually Inserting Hyperlinks

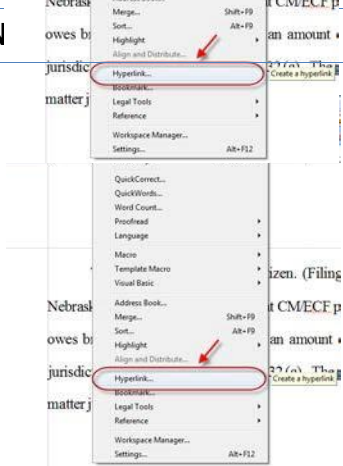

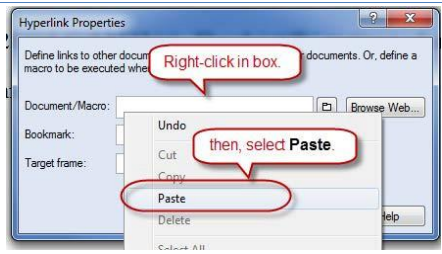

As previously described, hyperlinks to documents filed on CM/ECF can be manually added to a document. It is also possible to manually create links to documents available through commercial legal websites (e.g., Lexis or Westlaw), and those posted on the court's website (Local Rules).

Manually adding links can be labor intensive if the document is long, but the process is not difficult. And even if you are primarily using software to add links to a document, understanding the underlying mechanics of hyperlinking within WordPerfect and Word documents is helpful and may be necessary if, for example, you need to make corrections to the automatically created links.

### Manually Creating Links to Online Research Resources



The process for manually adding links to Westlaw, Lexis, Google Scholar, or any other online research resource (LoisLaw, FastCase, etc.) is the same.

STEP	ACTION
1	<p>In the brief, use your cursor to select the citation from which you want to link.</p> <p>The United States Supreme Court has held that the FAA “embodies the national policy favoring arbitration.” <a href="#">Buckeye Check Cashing, Inc. v. Cardegna, 546 U.S. 440, 443 (2006)</a>. See also <a href="#">Mastrobuono v. Shearson Lehman Hutton, Inc.</a>, 514 U.S. 52, 56 (1995);</p>
2	<p>Sign into the legal research website and open the cited document. Select the url address for the document. Right-click, and <b>Copy</b> the address. See e.g.,</p> <div data-bbox="500 1209 1333 1493"></div> <p><b>Note:</b> Check your local rules for any authority or limitations on the legal research websites to which links are permitted.</p> <p><b>Note:</b> Some attorneys have reported difficulty using this method to insert links to Lexis research. An alternative option is described in Appendix A.</p>

STEP	ACTION	
3	a	<p>From <b>Tools</b> on the menu bar, select <b>Hyperlink</b>.</p> 
	b	<p>A <b>Hyperlinks Properties</b> dialog box will appear.</p> <p>Use the <b>Delete</b> key from the computer keyboard to remove <code>&lt;current document&gt;</code></p> 
	c	<p>Right-click in the <b>Document/Macro</b> box.</p> <p>Select <b>Paste</b>.</p> 
	d	<p>Click <b>OK</b>.</p> 
	e	<p>The link to the citation will be added in your brief.</p> <p>The United States Supreme Court has held that “[a]rbitration is a matter of contract, and a party cannot be forced to arbitrate a dispute unless it has agreed to do so.” <a href="https://www.leix.com/research/retrieve?_m=64693a9bb244b8b400049179777118cb&amp;cscv=1e&amp;cform=byCitation&amp;fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLbVz8-zSkAW&amp;_md=6f87fb498fed8e551d2dd04d0e10c2b">https://www.leix.com/research/retrieve?_m=64693a9bb244b8b400049179777118cb&amp;cscv=1e&amp;cform=byCitation&amp;fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLbVz8-zSkAW&amp;_md=6f87fb498fed8e551d2dd04d0e10c2b</a> <b>Buckeye Check Cashing, Inc. v. Fishback</b>, 553 U.S. 921 (2008). See also <i>Mastrobuono v. Shearson Lehman Hutton, Inc.</i>, 514 U.S. 52, 56 (1995);</p>

## Manual Links to Court Websites

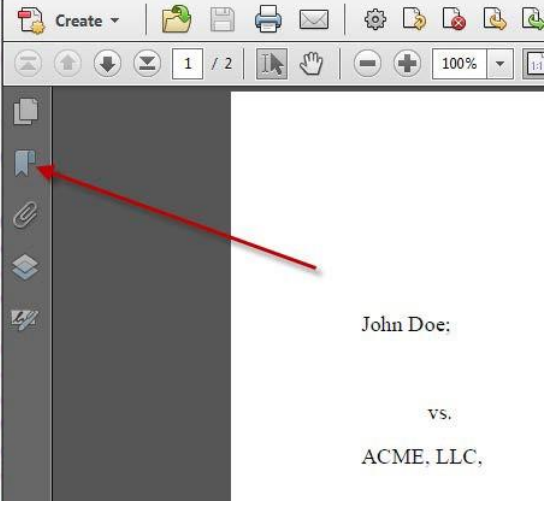
You may wish to cite to published opinions on a court's website, or to the court's local rules. To do so:

STEP	ACTION
1	<p>In your brief, select the text to be linked.</p> <p>the police from potential danger.’” <a href="#">United States v. Taylor</a>, 636 F.3d 461, 464 (8th Cir. 2011)(quoting <a href="#">South Dakota v. Opperman</a>, 428 U.S. 364, 369 (1976); see also <a href="#">United</a></p>
2	<p>Locate and copy the url address for the citation. See e.g.,</p> <div style="text-align: center;">  <p><b>OR</b></p>  </div>
3	<p>Referring to the previous section, “<b>Manually Creating Links to Online Research Resources</b>,” complete Step 3.</p>

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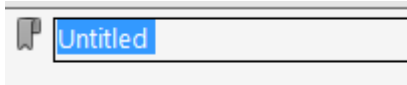
## Create Bookmarks in a PDF

A bookmark is a type of link within Acrobat PDF documents. Each bookmark goes to a different view or page in the document. They can mark places in a document for easy access later. Follow the steps in the table below to add bookmarks to your PDF files.

Step	Screen
<p>1. Click the <b>Bookmark</b> tab on the left side of the window to open the bookmarks panel.</p>	
<p>2. Navigate to the page where you want the bookmark.</p> <p>In the Bookmarks pane, click the <b>New Bookmark</b> icon.</p>	

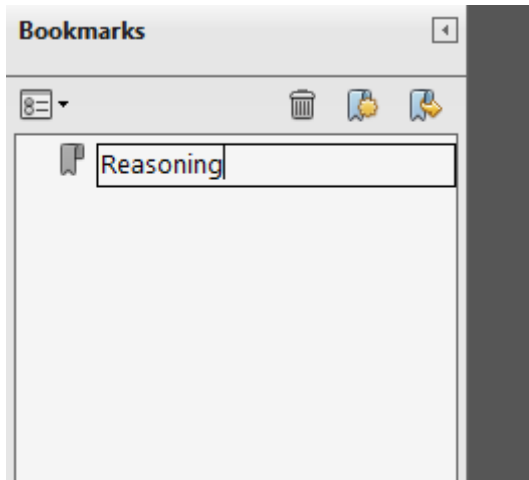


3. A new bookmark will appear as



Type a name for the bookmark.

Note: If you highlight text on the page before clicking the New Bookmark button, the selected text will automatically become the name of the bookmark.



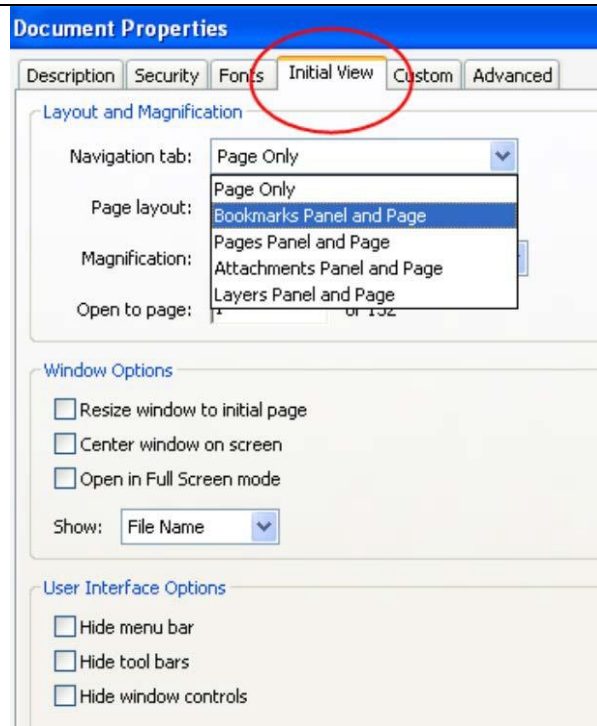
4. Repeat steps 2-3 until all bookmarks are placed.

To ensure that the bookmarks are displayed when the document is opened, we need to set the view property.

5. From the **File** menu, choose **Properties**.

6. Click on the **Initial View** tab.

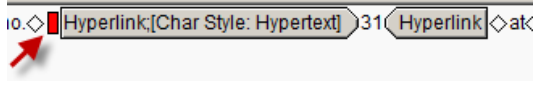
7. From the **Navigation tab** list, choose **Bookmarks Panel and Page** or **Attachments Panel and Page** depending on your situation.



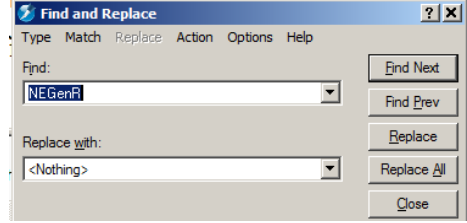
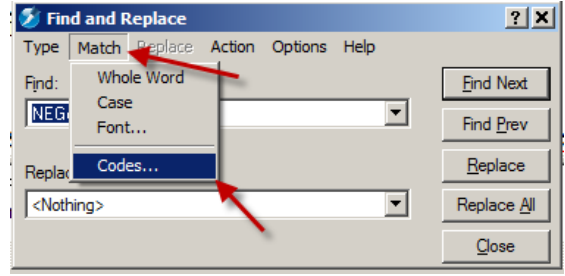
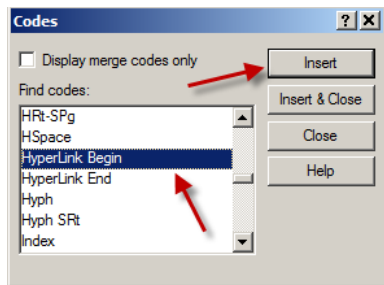
## Final Editing

### Removing Links

To remove **a specific hyperlink** in a WordPerfect document:

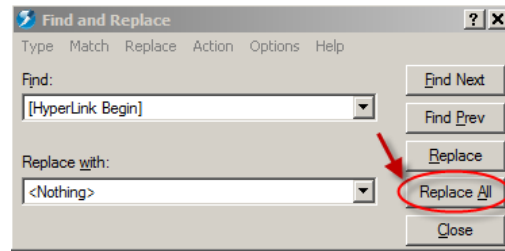
Press <b>Alt + 3</b> to open Reveal Codes.	
Place your cursor in front of the Hyperlink coding for the link to be removed.	at ¶ 43; filing no. <a href="#">31</a> at ¶ 42. 
Press the <b>Delete</b> key.	

To remove **all** hyperlinks in a WordPerfect document:

Press <b>Alt + 3</b> to open Reveal Codes.	
Place your cursor at the beginning of the text in the Reveal Codes box. Type <b>Ctrl + F</b> . A Find and Replace dialogue box will open.	
Select <b>Match</b> , then <b>Codes</b> .	
A <b>Codes</b> box will appear. In <b>Find codes</b> , scroll and select <b>Hyperlink Begin</b> . Click <b>Insert</b> .	

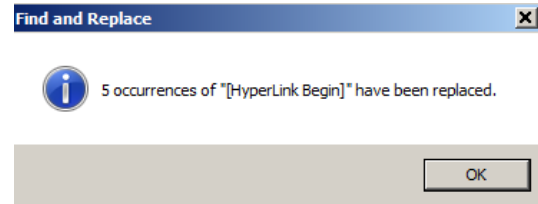
**[HyperLink Begin]** will appear in the **Find:** box.

Replace with **<Nothing>** and select **Replace All**.



A display will open stating how many hyperlinks were replaced with “nothing.”

Click **OK**.



### Editing Linked Text

To make additions to or change hyperlinked text in a WordPerfect document:

1. Place your cursor at the end of the linked text.
2. Use the back arrow on your keyboard to move your cursor into the linked text to the position where the text must be added or changed, and
3. Type in your changes.

## Publish to PDF—Retaining the Hyperlinks

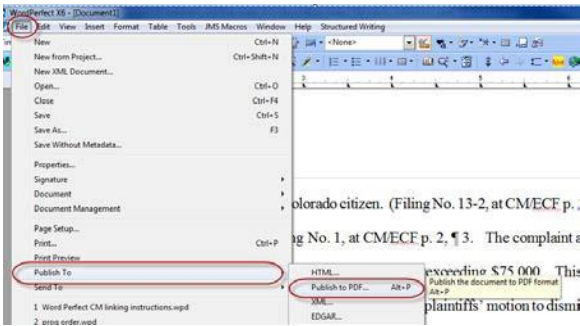
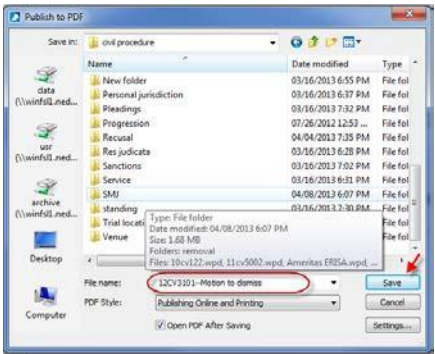
All documents filed in CM/ECF are PDFs, so all documents created for filing must be converted to a PDF document. To include hyperlinks in your filed documents, place all the links into the document using your word processing system before converting the document to a PDF format.

Once all links are in the document, use your word processing software to save or convert your briefs, or other documents you have created for filing, in a PDF format.

Note: Do **NOT** use **Print to PDF** to create a PDF of a brief with hyperlinks—the hyperlinks will be lost. Do **NOT** print the document and scan it to PDF format.

### Conversion to PDF

To save (“publish”) a WordPerfect document in PDF format:

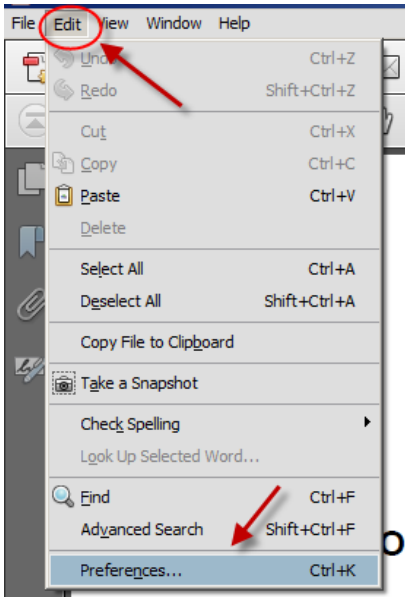
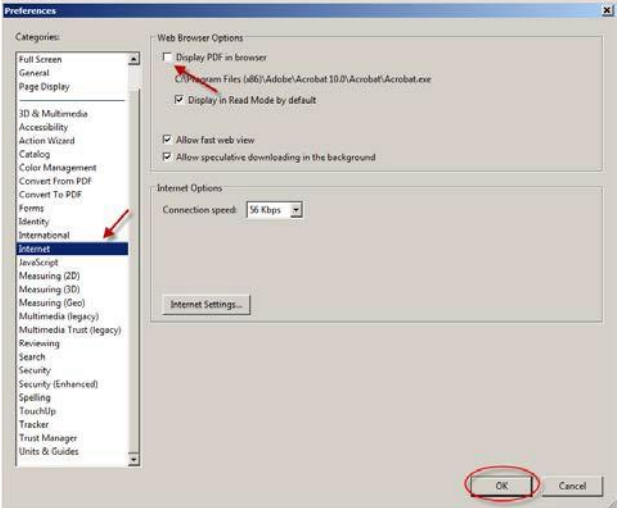
STEP	ACTION	
1	Select <b>File</b> → <b>Publish To</b> → <b>Publish to PDF</b> . Or Type <b>Alt + P</b> .	
2	The <b>Publish to PDF</b> dialog box will open. <b>Browse</b> to the file location for saving the file. Name the file. Click <b>Save</b> . A PDF will be created with active links.	
3	After the document is published to PDF, you may file it on CM/ECF using typical filing processes. With the exception of filing a document with links to its own attachment (discussed previously), no special steps are needed for filing a hyperlinked document on CM/ECF.	

## Additional Tips

### Viewing a website location opened from a link in a CM/ECF filing:

When opening a PDF document filed on CM/ECF, make sure you are opening PDFs in your PDF software and not within the Web browser itself. Opening the CM/ECF documents in the web browser will result in unnecessary toggling between the document opened on CM/ECF and any website locations opened from links within that CM/ECF document, and will make it difficult or impossible to display the CM/ECF document on one screen and the website location on another.

For those who use Adobe Acrobat, this setting adjustment is made as follows:

<p>With an Adobe Acrobat document open,</p> <p>Click <b>Edit</b>,</p> <p>then <b>Preferences</b>.</p>	
<p>From the Categories, scroll and select <b>Internet</b>.</p> <p>Make sure <b>Display PDF in browser</b> is <u>not</u> selected.</p> <p>Click <b>OK</b>.</p>	

After you change this setting, you will need to close and reopen your Web browser before opening CM/ECF filings.

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This manual was based on the instructional guide produced by Magistrate Judge Cheryl Zwart of the District Court of Nebraska.

Please share your comments, questions, corrections, and experiences with hyperlinking or using this Guide by contacting:

IT Department  
US District Court for the Central District of California  
(213) 894-6133