

# Attorney Guide to Hyperlinking in the Federal Courts (for Microsoft Word 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 documents 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.

<p><b>Internal Links</b></p>	<p>For example, the Table of Contents located at the beginning of this Guide.</p>			
<p><b>Links to documents previously filed on CM/ECF</b></p>	<p>The Defendant's di <a href="https://ecf.cacd.uscourts.gov/doc1/031117465106">https://ecf.cacd.uscourts.gov/doc1/031117465106</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 describec</p>			
<p><b>Links to attachments and exhibits being filed with your brief</b></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center;">03/16/2012</td> <td style="width: 5%; text-align: center;"><a href="#">4</a></td> <td style="width: 80%;">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)</td> </tr> </table> <p><b>Note:</b> Evidence <i>must</i> be filed of record. A hyperlink to a public website where evidence can be found is not a substitute for filing evidence in support of a motion.</p>	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)
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)		
<p><b>Links to case and statute citations</b></p> <p><b>Note:</b> Unless a cited case cannot reasonably be found from a public source, it is not necessary to attach copies of cases or statutes to your brief.</p>	<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;vr=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;vr=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;csvc=le&amp;cfm=byCitation&amp;_fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-z5kAl&amp;_md5=dbc62caac84f829e4e40ec37b92e8d">https://www.lexis.com/research/retrieve?_m=9bb0a60fca07b454655d5b593fccc60f&amp;csvc=le&amp;cfm=byCitation&amp;_fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-z5kAl&amp;_md5=dbc62caac84f829e4e40ec37b92e8d</a> when a "subject-matt</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 Timberla</a> <a href="#">Lumber Co., No. 12-1892 (8th Cir. April 8, 2013)</a></p>			

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## Creating a Hyperlinked Table of Contents

A table of contents in a Word document can include internal hyperlinks for navigating the document. When the document is converted to PDF format, these links will become bookmarks in the PDF document.

Although there are several methods for creating a table of contents in Word 2010, the one most useful to attorneys (and discussed below), is to create the document, include any headings as you write, and then:

- Mark and format the headings to be included in the table of contents;
- Generate and insert the table of contents; and
- Edit as needed.

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### Marking and Formatting Table of Contents Entries

To mark and format entries to be included in the table of contents:

STEP	ACTION
1	Create your document, inserting all headings with the format of your choice.
2	Using your cursor, scroll over and select the heading you want to include in the table of contents. <div style="text-align: right; margin-top: 10px;"><span>LEGAL ANALYSIS</span> <span><u>A. ERISA Plan</u></span></div>

3

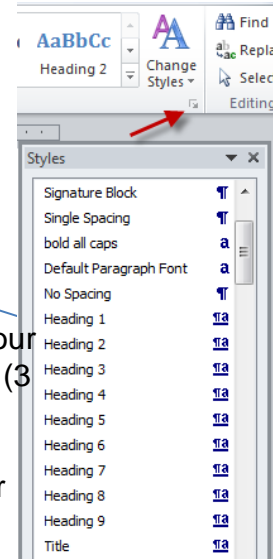
From the **Styles** section on your **Home** tab,



Click the down arrow in the right lower corner.



A drop down list will appear.



**Note:** There are 9 pre-formatted Heading Styles available in MS Word, but only 2 may be visible in your styles drop-down menu. Additional heading options (3 through 9) will appear, as you make your selections. For example, when you select and apply Heading 2, the Heading 3 option will appear and be available for the next heading level, and so on.

**If...**

You want the text of the table of contents entries to **match the headings already created** within your document (e.g. font, font color, bold, etc.):

You want to:

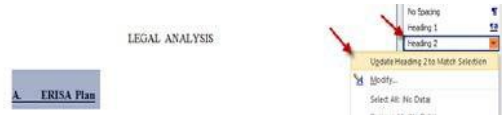
**Set a standard format** (e.g. font, font color, bold, etc.), for all headings and table of contents entries created with your Word program,

Or

**Change the heading format** in the brief already created:

**Then...**

Use your cursor to select the heading to be included in the table of contents.



From the Styles list, **Right-click** the heading level you wish to apply. In the box that appears, select:

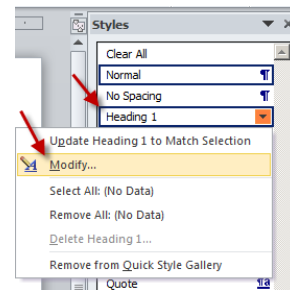
**Update Heading [x] to Match Selection.**

Continue until a heading style has been applied to all heading levels within your brief.

From the Styles list,

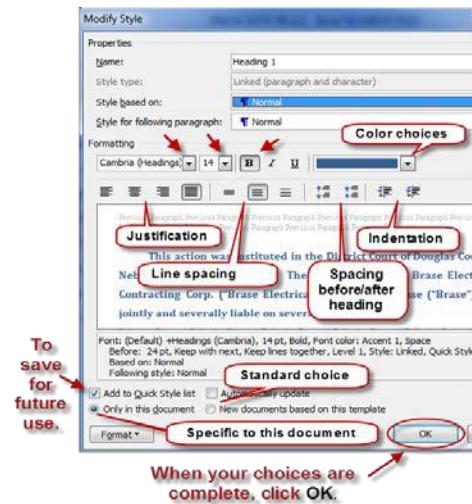
**Right-Click** the heading level you wish to modify.

In the box that appears, select **Modify** to open the Modify Style box.



Choose text:

- font
- font size
- appearance
- color
- justification
- line spacing



Save settings for:

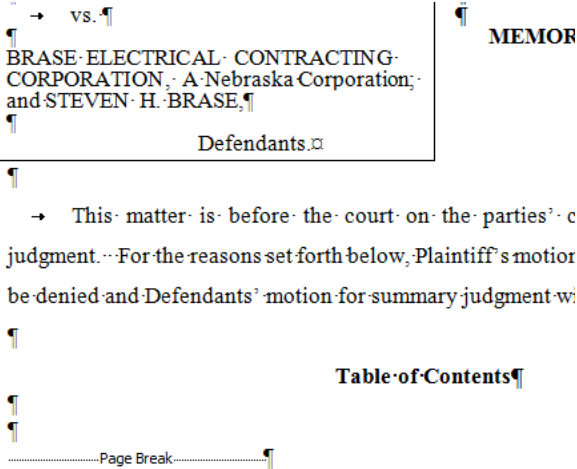
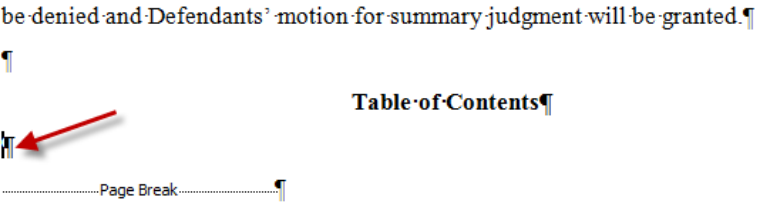
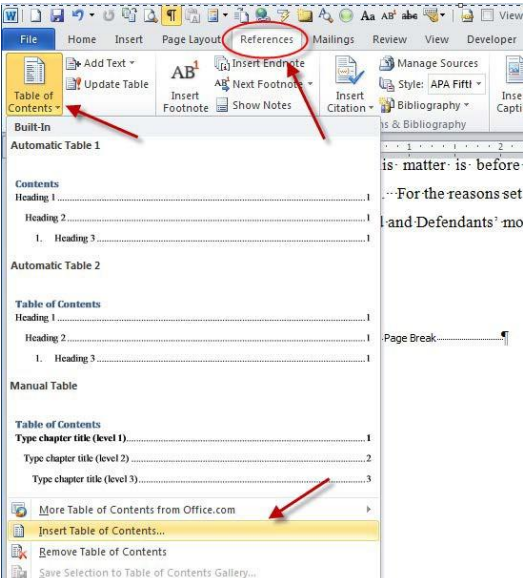
- **only in this document**, or
- all documents created using your standard **templat**
- **Add to Quick Style List.**

Click **OK**.

Scroll through your document. For each heading, select the heading text with your cursor, then click the heading style to be applied.

## Generating and Inserting the Table of Contents

To add the Table of Contents to your document:

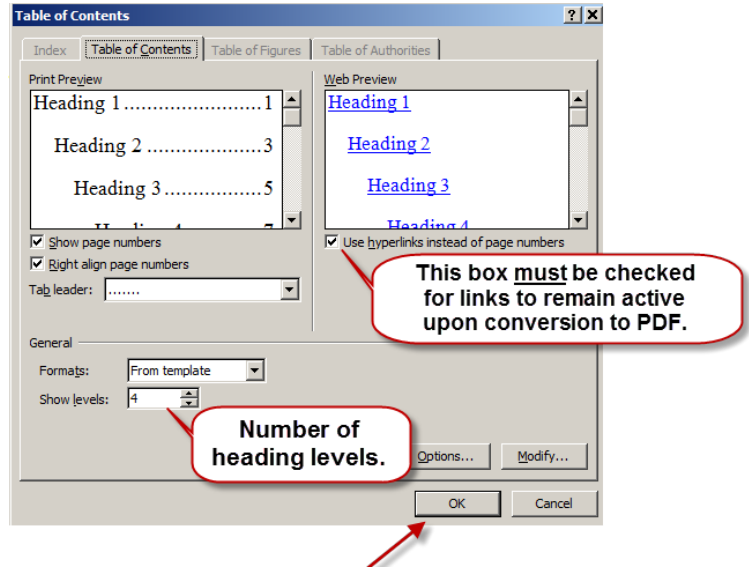
STEP	ACTION
<p>Place your cursor in the document at the location you want to insert the table of contents.</p> <p>Add a title for the <b>Table of Contents</b>.</p> <p>Enter a few hard returns.</p> <p><b>Control + Enter</b> to insert a page break.</p>	
<p>Place your cursor where the table of contents entries should begin.</p>	
<p>From the <b>References</b> tab of your Word ribbon, Select <b>Table of Contents</b>, and from the menu that appears, Select: <b>Insert Table of Contents</b>.</p>	

Make selections for the appearance of the table of contents.

Click **OK**.

**Note:** If your table has more than three levels, you must set **Show levels** to the correct number.

**Note:** The “Use hyperlinks instead of page numbers” must be checked or the table of contents will not have active links upon conversion to PDF.



The Table of Contents, with active section links, will be inserted into your document.

**Note:** You can manually modify the page numbers to appear as other links in your document, (e.g. blue and underlined).

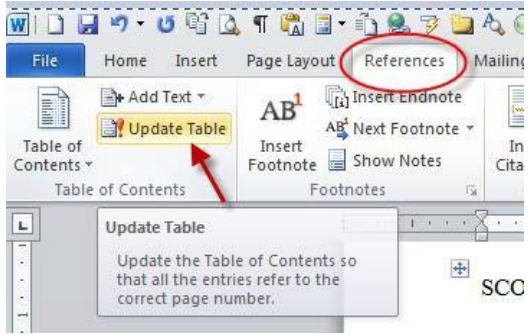
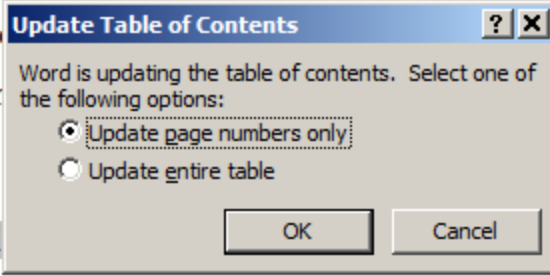
Table of Contents	
PROCEDURAL BACKGROUND .....	2
STANDARD OF REVIEW .....	2
UNDISPUTED FACTS .....	5
LEGAL ANALYSIS .....	5
A. ERISA Plan .....	5
B. ERISA Preemption .....	7
C. ERISA Claims .....	8
1. ERISA--The Well-Pleaded Complaint Rule.....	8
2. The Merits of Plaintiff's Claim for ERISA benefits.....	10
a) ERISA Standard of Review .....	10
b) Right to Recovery under the Terms of the Retirement Plan.....	11
c) Right to "Appropriate Equitable Relief" under ERISA.....	17



## Editing the Table of Contents (if needed)

Inserting the Table of Contents may result in page break changes. For example, hard page breaks or extra lines that were added during drafting to adjust the overall look of the document may no longer be needed, or some may now need to be added.

If the brief was modified after the table of contents was inserted:

STEP	ACTION
<p>From the reference tab on the Word ribbon, select <b>Update Table</b>.</p>	
<p>Select <b>Update page numbers only</b>. Click <b>OK</b>.</p> <p><b>Note:</b> If you have added or changed a heading, choose <b>Update entire table</b>.</p>	

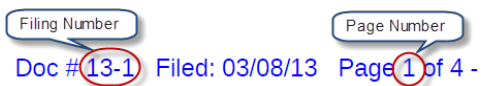
When the entire document is complete, using MS Word, **Save** the document as a PDF or **Create PDF** in accordance with the instructions in this Guide.

**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 are creating a document which will include links to documents filed on CM/ECF, use a consistent citation format that cites the CM/ECF filing number along with the CM/ECF page number. For example:

STEP	ACTION
1	<p>Download the filings from CM/ECF, and save them in your computer. <b>Reminder:</b> 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.</p>

STEP	ACTION
2	<p>Documents downloaded from CM/ECF will include a header that identifies the CM/ECF filing number and the page numbers within that filing.</p> 
3	<p>When drafting your brief, cite to the CM/ECF filing number and CM/ECF page number to which you are citing. For example:</p> <p style="text-align: center;">Assume you are citing to the following page of evidence.</p> <p style="text-align: center;"><a href="#">Doc # 13-1</a> Filed: 03/08/13 Page 3 of 4</p> <p style="text-align: center;">The citation within the brief could appear as follows:</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">The Plan included a Trust Agreement. (Filing No. 13-1, at CM/ECF p. 3).</p> </div> <p>Note: A consistent citation format is necessary when using CM/ECF LinkBuilder, an automated method for adding links to CM/ECF filings.</p>

### Gathering URLs for Links for Citations to the Record

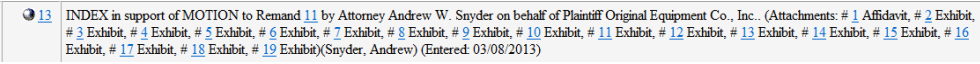
Now that the filing numbers and associated page numbers are in the brief, you can manually add links to the electronic record. You may gather these links from:

- saved Notices of Electronic Filing (no charge); or
- the docket sheet on PACER (PACER charge applies).

To obtain the url for the CM/ECF document *without* incurring a PACER charge:

STEP	ACTION
1	Collect and save on your computer the Notice of Electronic Filing (NEF) for all filings in the case.
2	<p>When you later need the link for the document cited,</p> <p>--retrieve the NEF for that document,</p> <p>--right-click on the <b>Document Number</b>, and from the drop-down menu that appears,</p> <p>Select <b>Copy Link Location</b>.</p>

To obtain the url for the document from the PACER docket sheet (*PACER charge applies*):

STEP	ACTION
1	<p>Open the CM/ECF docket sheet for the case and scroll to the cited docket filing.</p> 

2 If linking to the **main** CM/ECF filing, **right-click** on the docket filing number,

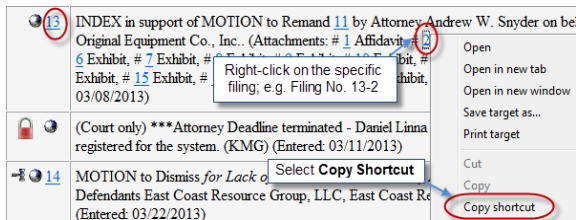


and **Copy shortcut**.

If linking to a **sub-file** within a CM/ECF filing number:

**Right-click** on the sub-filing number in the docket text and,

select **Copy Shortcut**.

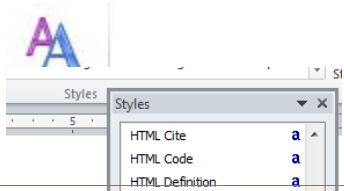
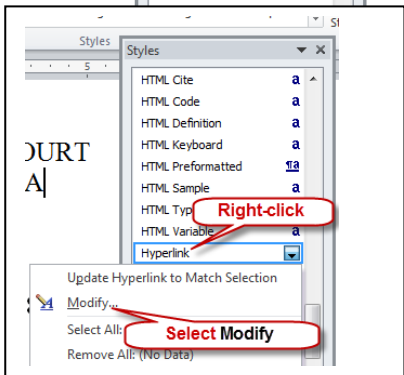


## Formatting the Appearance of the Links Inserted

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?

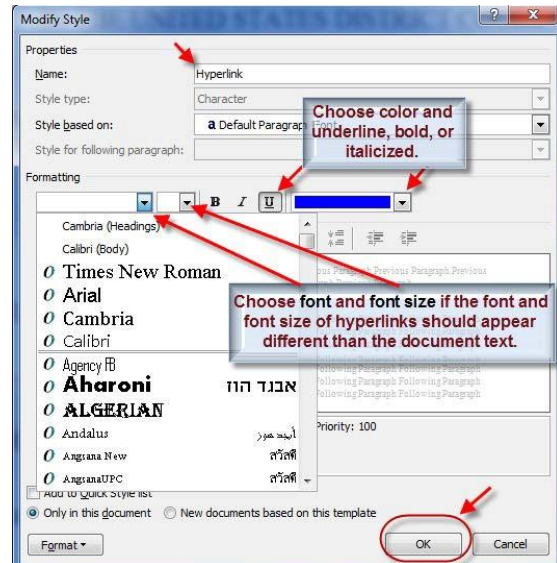
To select the appearance of the links in your document:

STEP	ACTION
1	On the <b>Home</b> tab, click on the tiny arrow under <b>Changes Styles</b> . 
2	A drop down menu will appear. Scroll down until you see <b>Hyperlink</b> . Right-click on <b>Hyperlink</b> , and from the choices that appear, select <b>Modify</b> . 

3 A **Modify Style** box will appear.  
Change the color, font, and underlining, etc. for hyperlinks.

**Note:** Choose a specific font and font size for the linked text *only* if the linked text font and font size should appear different from that of the document text. Otherwise, leave the font and font size selections blank.

Click **OK**.



## Linking to CM/ECF Documents

### Using LinkBuilder to Insert Links to Documents Previously Filed on CM/ECF

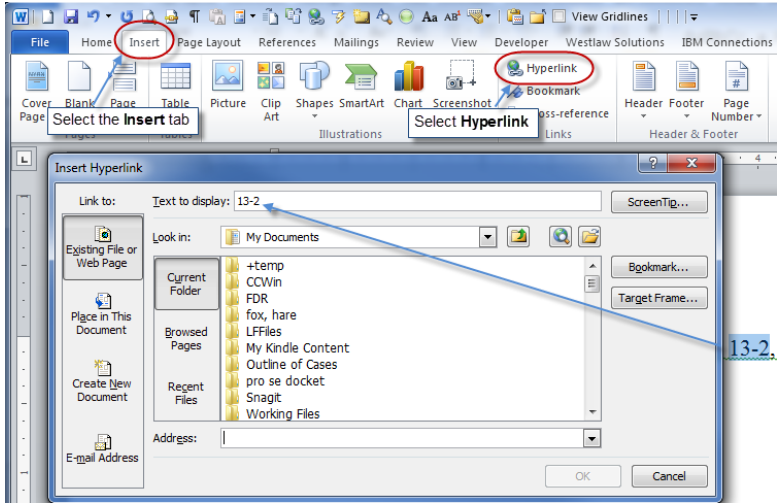
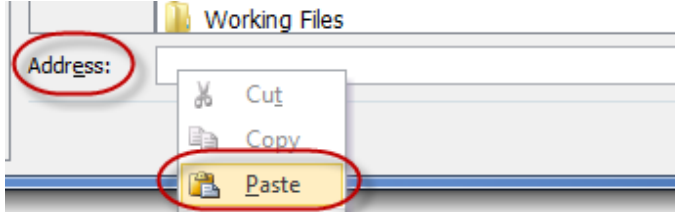
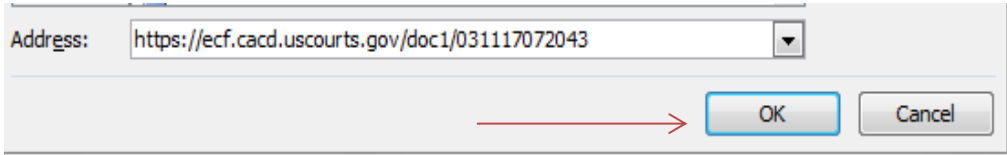
The CM/ECF LinkBuilder add-in for Word automates the creation of cross-document hyperlinks between filings in the federal court's CM/ECF system. LinkBuilder will search a Microsoft Word document for citations to CM/ECF filings and insert a hyperlink to the corresponding file in the CM/ECF system. LinkBuilder can recognize and link to attachments to the record, as well as page specific references to create pinpoint access to specific information in the case.

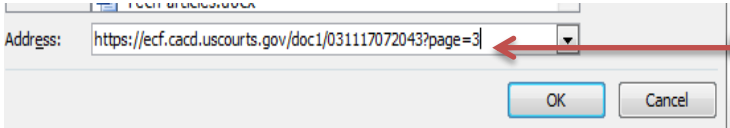
For more information and to download the LinkBuilder tool, visit <http://www.ned.uscourts.gov/internetDocs/cmecf/LinkBuilderforMSWord.pdf>

### Manually 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:

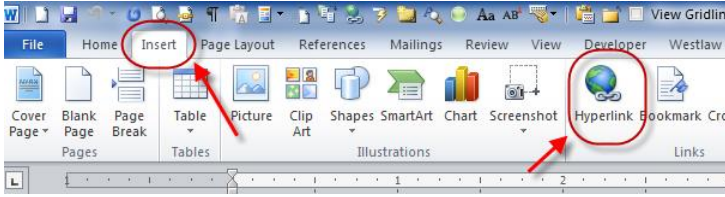
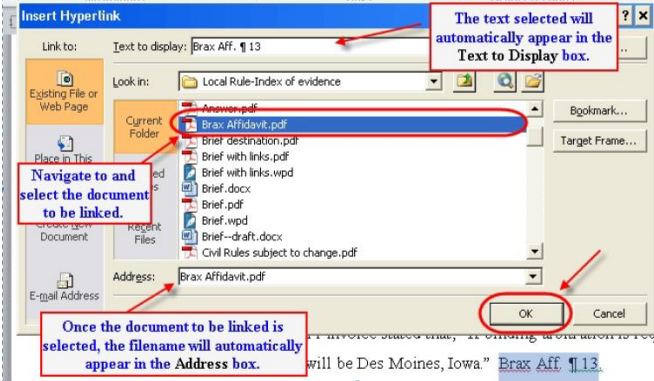
STEP	ACTION
1	In the brief, use your cursor to select the citation to which a hyperlink will be added.  The defendant is a Colorado citizen. ( <u>Filing No. 13-2, at CM/ECF p. 3).</u>

STEP	ACTION
2	<p>Select the <b>Insert</b> tab on the MS Word ribbon, then select <b>Hyperlink</b>. An <b>Insert Hyperlink</b> dialog box will appear.</p>  <p><b>Note:</b> The text you selected will automatically appear in the “<b>Text to display</b>” line.</p>
3	<p>Place your cursor in the <b>Address</b> box of the Insert Hyperlink dialog box. Right-click. From the drop-down that appears, select <b>Paste</b>.</p> 
4	<p>The link to the first page of the filing will appear.  <i>To link to the filing only, or to only page 1 of the filing, click <b>OK</b>. The link to the citation will be added in your brief.</i></p> 


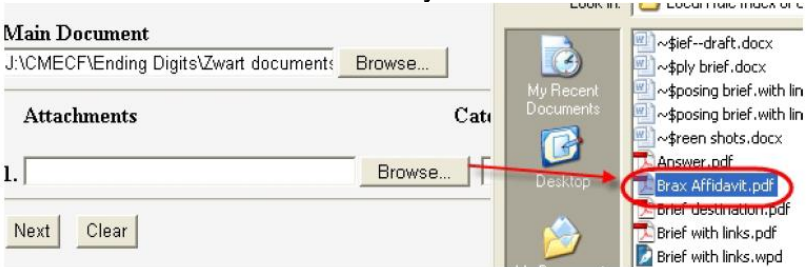
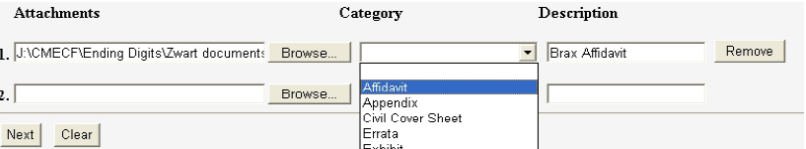
STEP	ACTION
5	<p>To link to the specific page number of the CM/ECF filing that you are citing,</p> <p>In the address box, scroll to or place your cursor at the end of the link address.</p> <p>Add the following text: <b>?page=&lt;page number&gt;</b> . For example,</p> <p>To link to page number 3 of a 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> Use the page numbers assigned by CM/ECF when linking to pages in documents filed in CM/ECF. Do <b>not</b> use Bates numbers or other numbering assigned to the record by the parties.</p> <p><b>Note:</b> While the document remains in an MS Word format, the link will go only to the first page of the document. But upon conversion to PDF (see instructions below), the PDF link will go to the specific page you cited.</p>
6	Convert the brief to a PDF following the instructions below.
7	<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 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 order 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 attachments in CM/ECF.

STEP	ACTION
1	Save all the attachment documents you will cite 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	Using your cursor, select the text to which a link will be added.  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.” <a href="#">Brax Aff. ¶ 13.</a>
4	On the <b>Insert</b> ribbon, select <b>Hyperlink</b> . 
5	In the <b>Insert Hyperlink</b> dialog box: <ul style="list-style-type: none"> <li>• Navigate to cited file saved on your computer;</li> <li>• <b>Select</b> the file; and</li> <li>• Click <b>OK</b>.</li> </ul> 
6	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.  and conditions sheet, and again putting Plaintiffs on notice that ar for any seed disputes, the 2011 invoice stated that, “If binding ar bag), the place of arbitration will be Des Moines, Iowa.” <a href="#">Brax Aff. ¶ 13</a> (emphasis added).  Add links to all the citations in your brief accordingly. <b>Note:</b> Specific page links can be added by following the directions in the previous section. Use the <b>PDF</b> page number, not a Bates number or footer page number, for the citation.
7	Save the order as a PDF as described in these instructions.



STEP	ACTION
8	<p data-bbox="407 243 1430 304">File the brief and evidence as follows:</p> <p data-bbox="407 304 1430 577"> <b>a</b> Following the normal procedure for filing orders on CM/ECF, browse to and select your brief with links as the main document.         </p>  <p data-bbox="407 577 1430 955"> <b>b</b> Browse to and select as an <b>Attachment</b> each PDF file to which a link was created in your brief.         </p>  <p data-bbox="407 955 1430 1512"> <b>c</b> Using the drop-down list, select the type of document attached, and provide a written description of the document. (<b>Note:</b> The written description will become the name assigned as a PDF bookmark when the file is downloaded by the court. However, a unique description is needed if similarly labeled documents are cited.)         </p>  <p data-bbox="613 1430 1398 1497">Repeat the foregoing steps until all cited evidence is filed as an attachment to your brief.</p> <p data-bbox="407 1512 1430 1722"> <b>d</b> 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 as attachments to the brief.         </p>

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## 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.

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### 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.thomson Reuters.com/law-products/solutions/brief-tools?searchterms=brief+tool">http://legalsolutions.thomson Reuters.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/In download/record.asp?ArticleID=6056">http://support.lexisnexis.com/In download/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>

## 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
<b>MS Word 2010</b>		X**	X***
<b>MS Word 2007</b>		X**	X***
<b>MS Word 2003</b>	X		X***
<b>MS Word 2000</b>	X		
<b>WordPerfect X6****</b>			
<b>WordPerfect X4 – X5</b>			X
<b>WordPerfect X3</b>	X		X
<b>WordPerfect 10 – 12</b>	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.

---

## 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-Word

InsertLink example-WordPerfect

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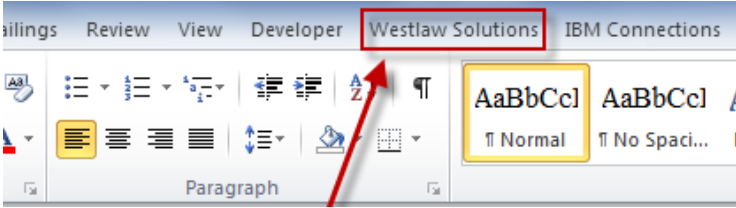
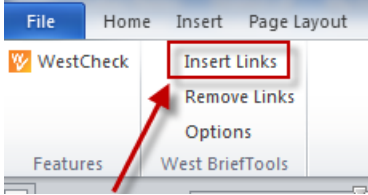
## Installing West InsertLinks

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 outline the system requirements and provides instructions on how to install West BriefTools.
- 

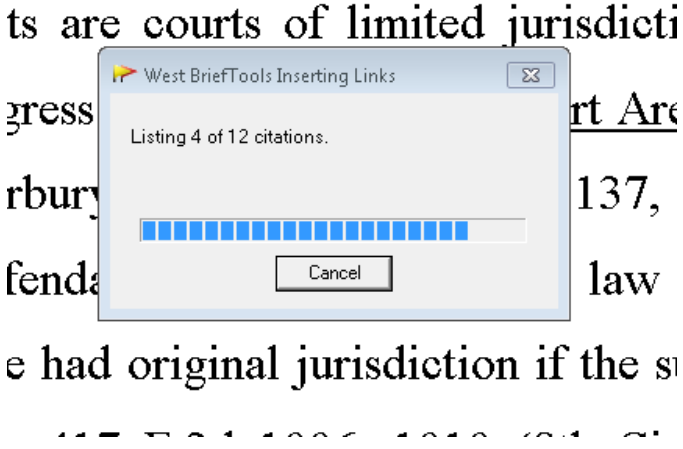
## Using West InsertLinks

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

STEP	ACTION
1	<p>With the Microsoft Word document to which you are adding links open on your screen:</p>  <p>Select the <b>Westlaw Solutions</b> tab on the Word ribbon.</p>
2	<p>The West BriefTools options will open.</p>  <p>Select <b>InsertLinks</b>.</p>

---

<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
3	<p>The InsertLinks software will begin searching the document for citations and inserting the appropriate links.</p>  <p>The box depicted above will disappear when the process is complete and all links are installed.</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 provide a step-by-step description on how to install Shepard's BriefSuite.

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

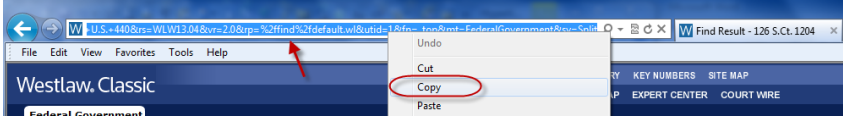
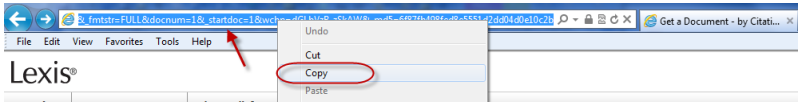
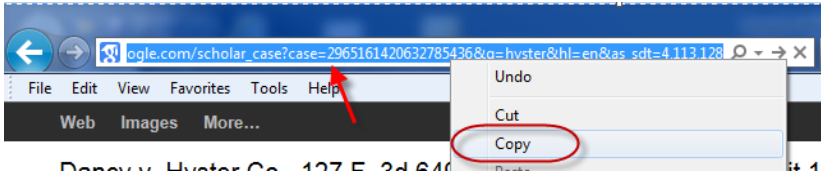
## Manually Inserting Hyperlinks

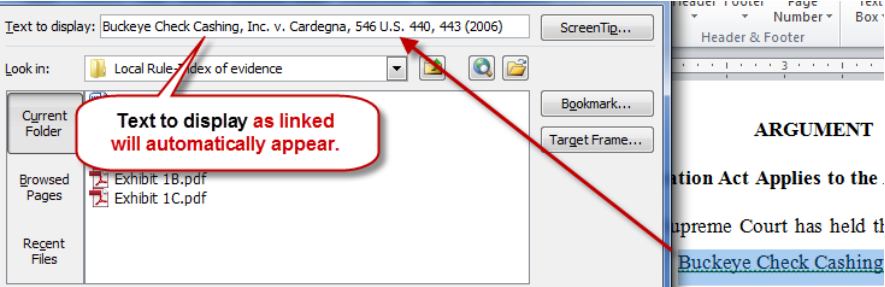


As previously described, hyperlinks to documents filed on CM/ECF can be manually added to a document about to be filed. It is also possible to manually create links to documents available through commercial legal websites (e.g., Lexis or Westlaw), and those posted on the court's website (Local Rules).

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 to which you are adding a 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</a>, 546 U.S. 440, 443 (2006). 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>  <p>OR</p>  <p>OR</p>  <p><b>Note:</b> Check your local rules for any authority or limitations on the legal research websites to which links are permitted.</p>

STEP	ACTION
3	<p data-bbox="451 262 1341 338">a Select the <b>Insert</b> ribbon, then select <b>Hyperlink</b>. An <b>Insert Hyperlink</b> dialog box will appear.</p>  <p data-bbox="527 653 1373 720"><b>Note:</b> The text you selected will automatically appear in the “<b>Text to display</b>” line.</p> <p data-bbox="451 753 1378 863">b Place your cursor in the <b>Address</b> box of the Insert Hyperlink dialog box. Right-click. From the drop-down that appears, select <b>Paste</b>.</p>  <p data-bbox="527 1100 659 1134">Click <b>OK</b>.</p> <p data-bbox="451 1142 1227 1176">c The link to the citation will be added in your order.</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 data-bbox="418 1652 980 1686">In your brief, select the text to be linked.</p> <p data-bbox="428 1703 1409 1785">the police from potential danger.’” <a href="#">United States v. Taylor, 636 F.3d 461, 464 (8th Cir. 2011)</a>(quoting <a href="#">South Dakota v. Opperman, 428 U.S. 364, 369 (1976)</a>; see also <a href="#">United</a></p>

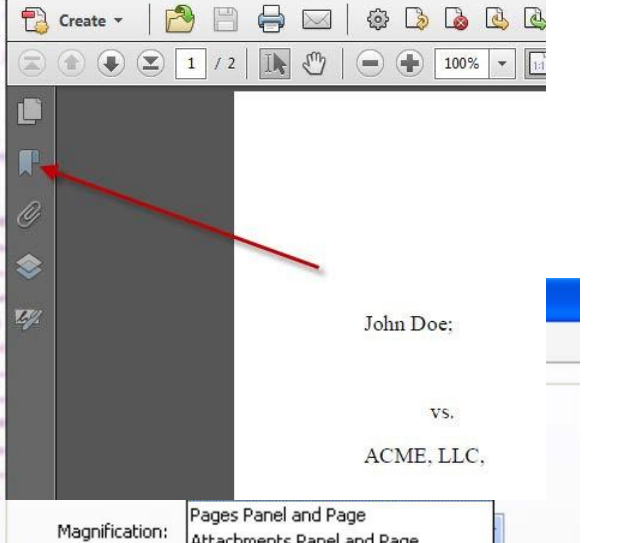
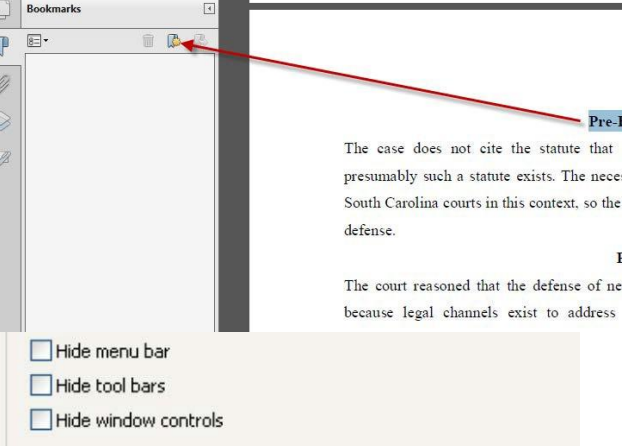
STEP	ACTION
2	<p data-bbox="418 254 1235 289">Locate and copy the url address for the citation. See e.g.,</p> <div data-bbox="625 317 1211 842">  </div> <p data-bbox="894 863 943 894" style="text-align: center;"><b>OR</b></p> <div data-bbox="617 905 1219 1499">  </div>
3	<p data-bbox="418 1522 1317 1591">Referring to the previous section, “<b>Manually Creating Links to Online Research Resources</b>,” complete Step 3.</p>



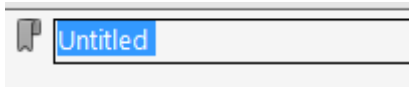
## Hyperlinking Guide for Attorneys Practicing in US District Court

### 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.

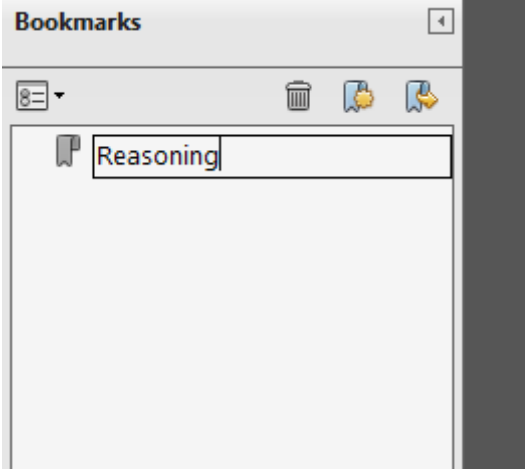
Step	Screen
<p>1. Click the <b>Bookmark</b> tab on the left side of the Adobe Acrobat window to open the bookmarks panel.</p>	 <p>The screenshot shows the Adobe Acrobat interface. The left sidebar contains several icons, and a red arrow points to the bookmark icon (a blue ribbon). The main window displays a PDF document with the text "John Doe;" followed by "vs." and "ACME, LLC." on separate lines. The top toolbar includes icons for Create, Save, Print, Email, and other functions. The status bar at the bottom shows "Magnification: 100%" and "Pages Panel and Page Attachments Panel and Page".</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>	 <p>The screenshot shows the Adobe Acrobat Bookmarks pane. A red arrow points to the "New Bookmark" icon (a blue ribbon) in the top-left corner of the pane. The main window displays a PDF document with the text "The case does not cite the statute that presumably such a statute exists. The need South Carolina courts in this context, so the defense." followed by "I" and "The court reasoned that the defense of ne because legal channels exist to address". The bottom of the pane has three checkboxes: "Hide menu bar", "Hide tool bars", and "Hide window controls".</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

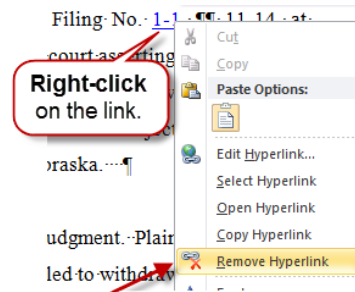
### Removing Links

To remove **a specific link** in a Word document:

Place your cursor over the link,

**Right-click**, and from the drop-down that appears,

click **Remove Hyperlink**.



To remove **all** links in a Word document:

Press **Ctrl + A** to select the entire document, then

**Ctrl + Shift + F9**.

### Editing Linked Text

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

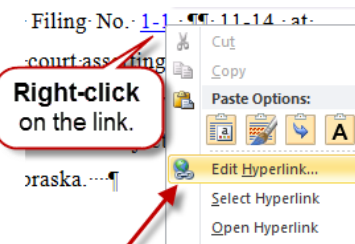
1. Place your cursor at the end of the linked text.
2. Use the back arrow on your keyboard to move your cursor in the linked text to the position where the text must be added or changed, and
3. Type in your changes.

Or

Place your cursor over the link,

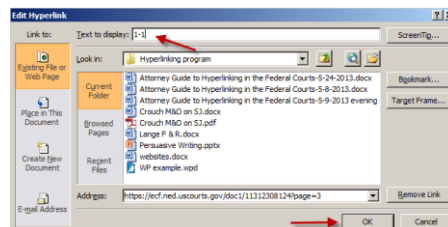
**Right-click**, and from the drop-down that appears, and

click **Edit Hyperlink**.



In the Edit Hyperlink box that opens,  
Type any changes in **Text to display**.

Click **OK**.



## Publish to PDF—Retaining the Hyperlinks


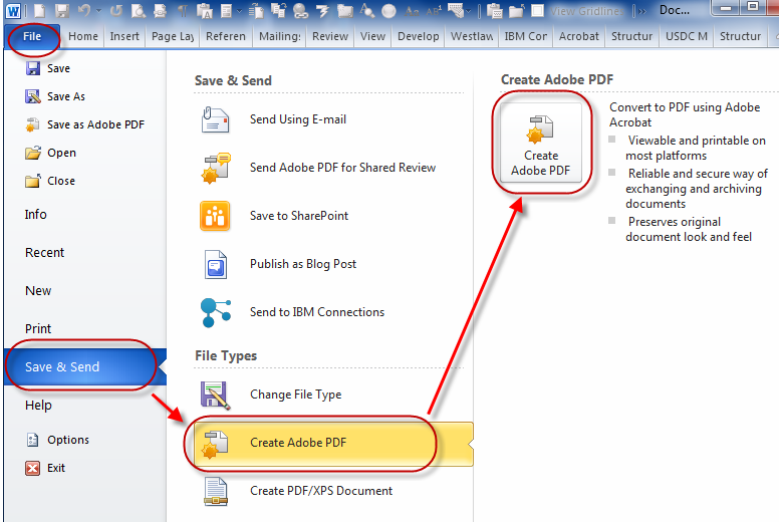
All documents filed in CM/ECF are in PDF format, so all documents created for filing must be converted to a PDF document. To include hyperlinks in your filed documents, place all the links into the document using your word processing system before converting the document to a PDF format.

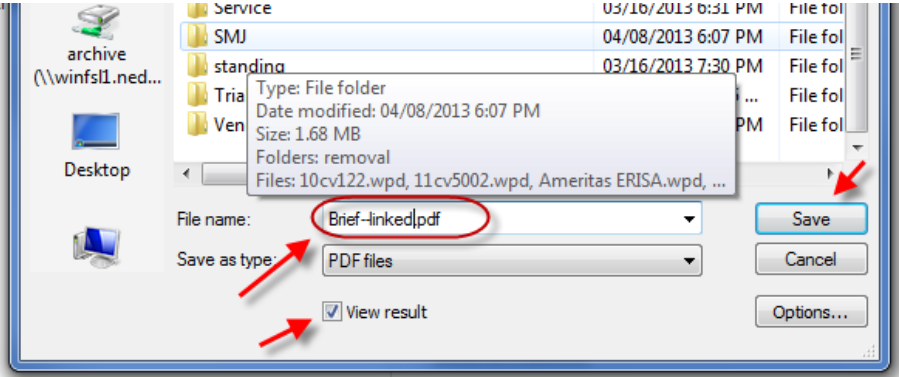
Once all links are in the word processing version of your document, use your word processing software to save or convert your briefs, or other documents you have created for filing, in a PDF format.

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

### Conversion to PDF

MS Word has several methods for saving (“publishing”) a document in PDF format, including the following methods:

STEP	ACTION
1	<p>Select the <b>File</b> tab on the MS Word ribbon;</p> <p>from the drop-down menu, select <b>Save and Send</b>;</p> <p>and from the choices now available,</p> <p>choose <b>Create Adobe PDF</b> from the <b>File Types</b> list,</p> <p>then </p> 

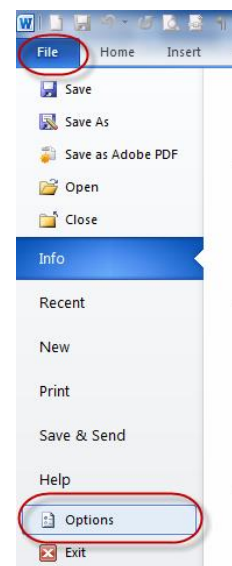
STEP	ACTION
2	<p>Navigate to the location where you want to save the document. Name the document and click <b>Save</b>.</p>  <p>Check <b>View Result</b> if you want the PDF document created to open upon conversion.</p>
3	<p>After the document is published to PDF, you may upload it to CM/ECF using typical filing processes. With the exception of filing a document with links to its own attachments (discussed previously), no special steps are needed for filing a hyperlinked document on CM/ECF.</p>

**Note:** If you have Adobe Acrobat Standard or Pro loaded on your computer, you may also add the Adobe Acrobat tab and ribbon to your MS Word ribbons and use the Acrobat ribbon to convert documents to PDF.

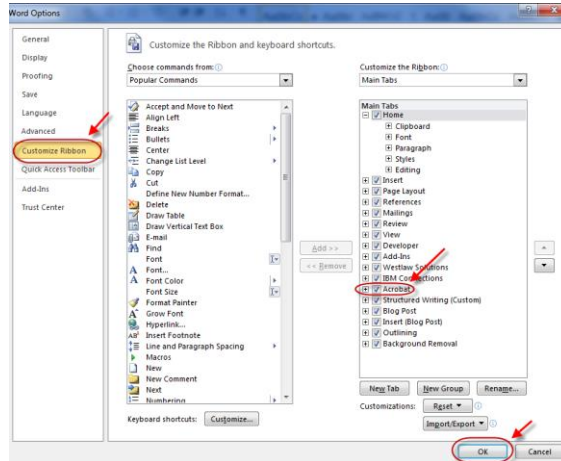
To do so:

Select the **File** tab on the MS Word ribbon.

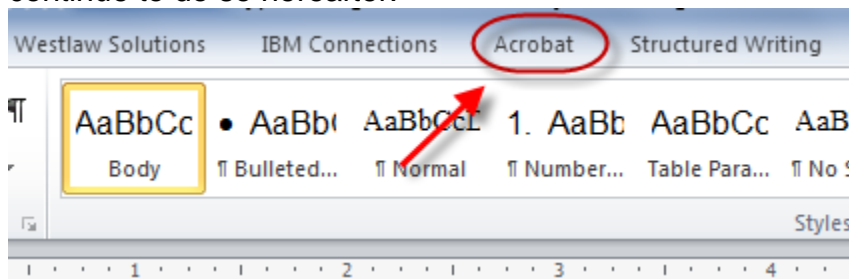
Choose **Options**.



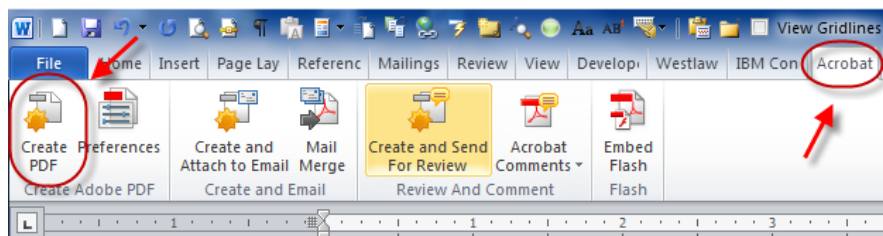
Select **Customize Ribbon**.  
Add the **Acrobat** tab.  
Click **OK**



An **Acrobat** tab will now appear on the MS Word ribbon, and will continue to do so hereafter.



After the **Acrobat** tab is added, save a document as a PDF by selecting the **Acrobat** tab, and then **Create PDF**.



After the document is published to PDF, you may upload it to CM/ECF using typical filing processes. With the exception of filing a document with links to its own attachments (discussed previously), no special steps are needed for filing a hyperlinked document on CM/ECF.

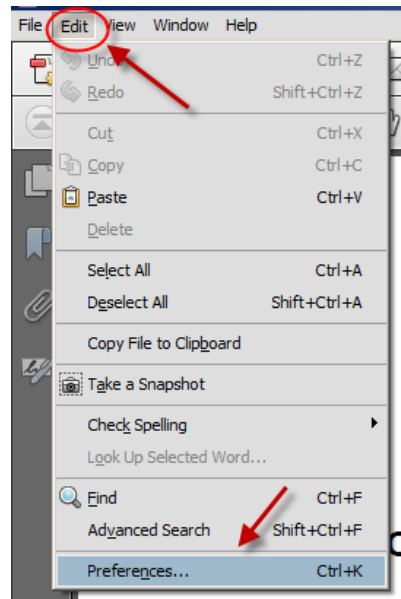
## Additional Tips

### 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:

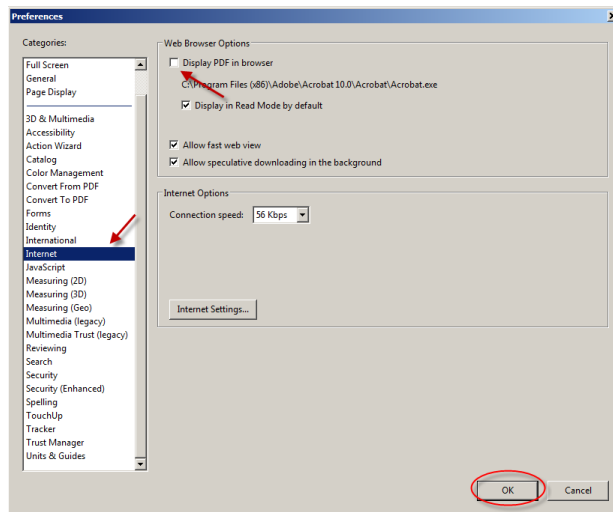
With an Adobe Acrobat document open,  
Click **Edit**,  
then **Preferences**.



From the Categories,  
scroll and select **Internet**.

Make sure **Display PDF in browser** is *not* selected.

Click **OK**.



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

## 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:


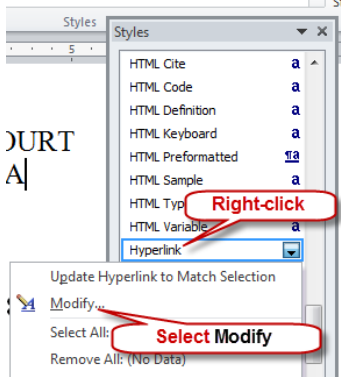
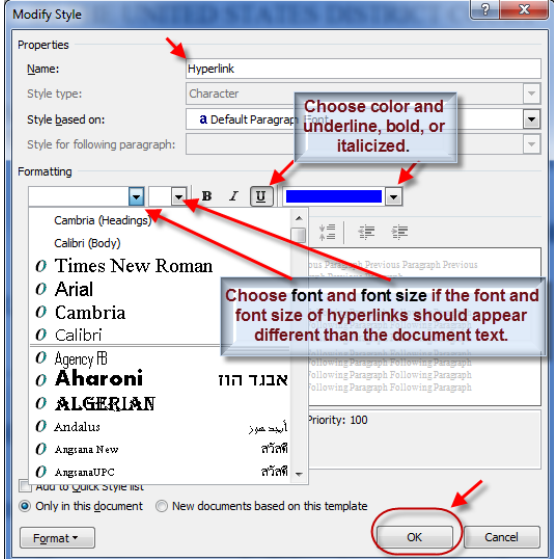
[blue and underlined](#),

**bold and black**,

*black and italicized*, or

some other appearance?

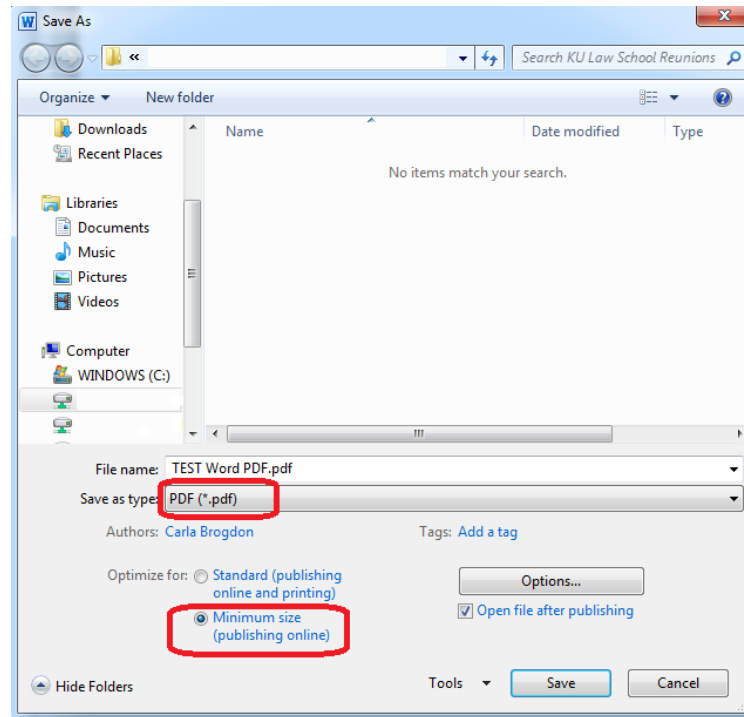
To select the appearance of the links in your document:

STEP	ACTION
1	<p>On the <b>Home</b> tab, click on the tiny arrow under <b>Changes Styles</b>.</p> 
2	<p>A drop down menu will appear. Scroll down until you see <b>Hyperlink</b>. Right-click on <b>Hyperlink</b>, and from the choices that appear, select <b>Modify</b>.</p> 
3	<p>A <b>Modify Style</b> box will appear. Change the color, font, and underlining, etc. for hyperlinks.</p> <p><b>Note:</b> Choose a specific font and font size for the linked text <i>only</i> if the linked text font and font size should appear different from that of the document text. Otherwise, leave the font and font size selections blank.</p> <p>Click <b>OK</b>.</p> 



## Optimized PDFs to reduce file size

Large documents or documents containing forms, photos or graphics should be saved as an optimized PDF to reduce file storage size. Select **File** and Click **Save As**. From the **Save as type** dropdown menu, select **PDF**. From the **Optimize for** radio buttons, Select **Minimum size (publishing online)**. Click **Save**.



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