

# Attorney Guide to Hyperlinking in the Federal Courts

<b>Attorney Guide to Hyperlinking in the Federal Courts</b> .....	1
Overview of Hyperlinking in Federal Court.....	2
Types of Permissible Hyperlinks .....	3
<b>Links to Prior CM/ECF Filings</b>	
Drafting Documents to Later Include Links to CM/ECF.....	4
Gathering the Links for Citations to the Record .....	4
Inserting CM/ECF links into your document—Microsoft Word .....	6
Inserting CM/ECF links into your document—Corel WordPerfect.....	7
<b>Links to Attachments to a Brief being Filed in CM/ECF</b>	
Adding Links to Attachments to a Brief being Filed—Microsoft Word.....	9
Adding Links to Attachments to the Document Being Filed—WordPerfect .....	12
<b>Links to Legal Citations</b>	
Access to Linking Software.....	15
Linking Software—Compatibility Information .....	16
Westlaw InsertLinks.....	17
Installing Westlaw InsertLinks .....	17
Using West InsertLinks—Microsoft Word.....	17
Using West InsertLinks—Corel WordPerfect .....	18
Shepard’s Links 2008.....	19
Installing Shepard’s Links.....	19
Using Shepard’s Links— Corel WordPerfect.....	20
<b>Manually Inserting Hyperlinks</b>	
Manually Creating Links to Westlaw or Lexis Resources .....	22
Manual Links to Court Websites .....	25
<b>Publish to PDF—Retaining the Hyperlinks</b>	
Conversion to PDF—Microsoft Word .....	26
Conversion to PDF—Corel WordPerfect.....	29

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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 local rules of a district, the following types of hyperlinks are typically allowed in court documents.

Type of link	Description (and Examples)
Links to documents previously filed on CM/ECF	<p>The defendants' discovery abuses have been thoroughly discussed in the court's prior orders, (Filing Nos. <a href="#">263</a>, <a href="#">329</a>, and <a href="#">364</a>), and the factual findings within those orders are incorporated herein by reference. As more specifically described in the prior orders: <a href="https://ecf.ned.uscourts.gov/doc1/11312528703">https://ecf.ned.uscourts.gov/doc1/11312528703</a></p>
Links to attachments and exhibits being filed with your brief	<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)</p>
Links to case and statute citations	<p>For example:</p> <p><b>Westlaw,</b></p> <p>by the attorney-client privilege or the work product doctrine. <a href="#">s</a>, <a href="#">2009 WL 4949959</a>, <a href="#">2009 U.S. Dist. LEXIS 121753</a> (D. Colo. <a href="#">: 502</a>: <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. <a href="#">s</a>, <a href="#">2009 WL 4949959</a>, <a href="#">2009 U.S. Dist. LEXIS 121753</a> (D. Colo. <a href="#">: 502</a>: <a href="https://www.lexis.com/research/retrieve?_m=9bb0a60fca07b454655d5b593fccc60f&amp;csvc=le&amp;cform=byCitation&amp;fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-zSkAl&amp;_md5=dbca62caac84f829e0e4d0ec37b92e8d">https://www.lexis.com/research/retrieve?_m=9bb0a60fca07b454655d5b593fccc60f&amp;csvc=le&amp;cform=byCitation&amp;fmtstr=FULL&amp;docnum=1&amp;_startdoc=1&amp;wchp=dGLzVlz-zSkAl&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 Timberland Lumber Co., No. 12-1892 (8th Cir. April 8, 2013)</a>.</p>
Links to Local Rules:	<p>Either to the entire document,</p> <p>The plaintiff's motion to compel should be summarily denied because <a href="http://www.ned.uscourts.gov/internetdocs/localrules/necivr.2012.pdf">http://www.ned.uscourts.gov/internetdocs/localrules/necivr.2012.pdf</a> consult and discuss the issue <a href="#">Click to follow link</a> filing his motion. <a href="#">Nebraska Civil Rule 7.1(i)</a>.</p> <p>or to the specific page within the document where the cited rule is located.</p> <p>The plaintiff's motion to compel should be summarily denied because <a href="http://www.ned.uscourts.gov/internetdocs/localrules/necivr.2012.pdf#page=10">http://www.ned.uscourts.gov/internetdocs/localrules/necivr.2012.pdf#page=10</a> consult and discuss the issue <a href="#">Click to follow link</a> filing his motion. <a href="#">Nebraska Civil Rule 7.1(i)</a>.</p>

## Links to Prior CM/ECF Filings

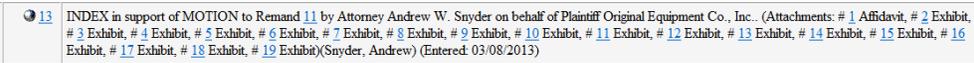
### Drafting Documents to Later Include Links to CM/ECF

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:

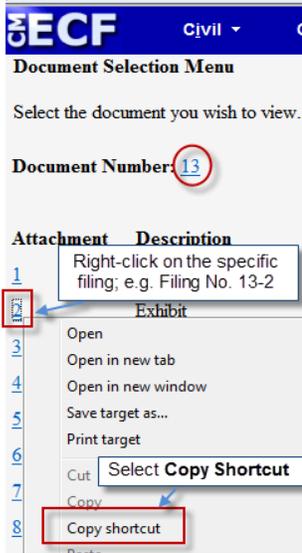
STEP	ACTION
1	Download the filings from CM/ECF, and save them in your computer. <b>Reminder:</b> You can download a document from CM/ECF one time for free when you receive the Notice of Electronic Filing. Charges apply to each additional download of the same document.
2	Documents downloaded from CM/ECF will include a header that identifies the CM/ECF filing number and the page numbers within that filing.  <div style="text-align: center;">  <p style="text-align: center;">Doc # 13-1 Filed: 03/08/13 Page 1 of 4 -</p> </div>
3	When drafting your brief, cite to the CM/ECF filing number and CM/ECF page number to which you are citing. For example:  <p style="text-align: center;">Assume you are citing to the following page of evidence.</p> <p style="text-align: center;">Doc # 13-1 Filed: 03/08/13 Page 3 of 4 .</p> <p style="text-align: center;">The citation within the brief could appear as follows:</p> <p>The Plan included a Trust Agreement. (Filing No. 13-1, at CM/ECF p. 3).</p> <p>Note: A consistent citation format is necessary when using CM/ECF LinkBuilder (currently under development by Kansas and Nebraska courts for nationwide use by attorneys) to add links.</p>

### 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 as follows:<sup>1</sup>

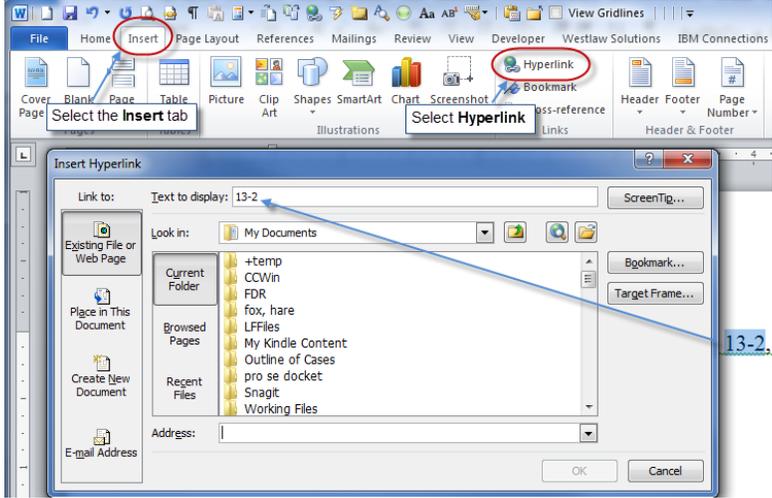
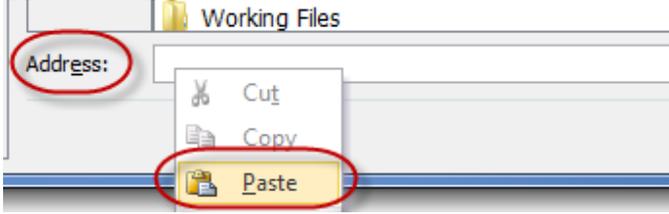
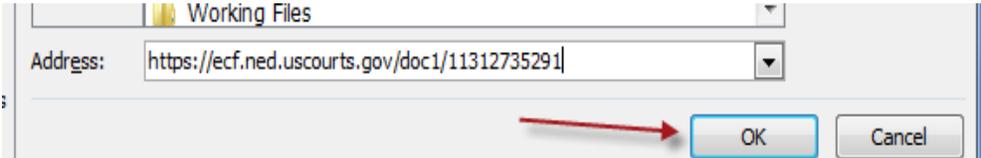
STEP	ACTION
1	Open the CM/ECF docket sheet for the case and scroll to the cited docket filing.  <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div>

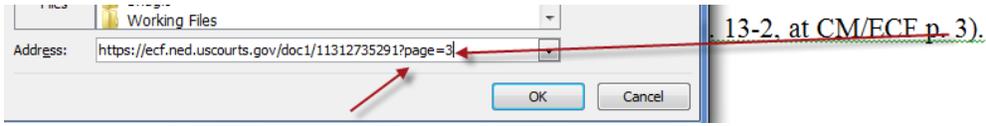
<sup>1</sup> CM/ECF LinkBuilder is currently being designed as an automation tool for use by counsel in adding CM/ECF links. The projected testing date is August 2013.

STEP	ACTION
2	<p>If linking to the <b>main</b> CM/ECF filing, right-click on the docket filing number,</p>  <p>then,</p> <p>If linking to a <b>sub-file</b> within a CM/ECF filing number:</p> <p><u>E</u>ither</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,</p> <p style="text-align: center;">Select <b>Copy Shortcut</b>.</p> <p><u>O</u>r</p> <p><b>Right-click</b> on the sub-filing number as reflected in the docket text</p> <p>and,</p>  <p>Select <b>Copy Shortcut</b>.</p>

## Inserting CM/ECF links into your document—Microsoft Word

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

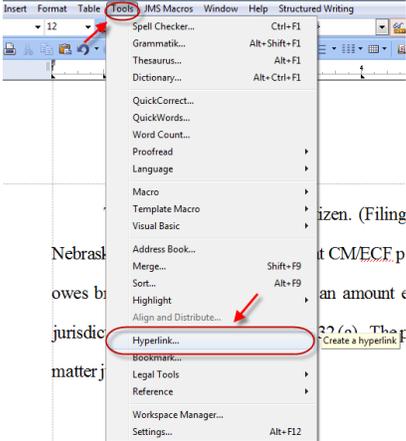
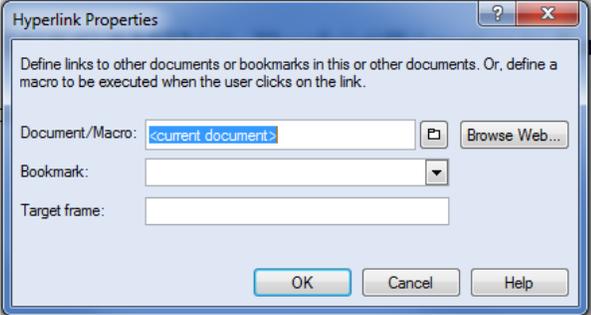
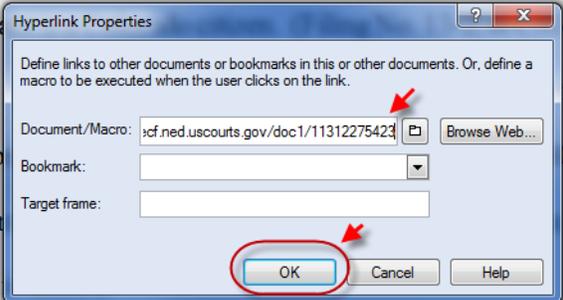
STEP	ACTION
1	<p>In the brief, use your cursor to select the citation you want to link.</p> <p>The defendant is a Colorado citizen. <u>(Filing No. 13-2, at CM/ECF p. 3).</u></p>
2	<p>Select the <b>Insert</b> tab on the MS Word ribbon, then select <b>Hyperlink</b>. An <b>Insert Hyperlink</b> dialog box will appear.</p>  <p><b>Note:</b> The text you selected will automatically appear in the “Text to display” 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.</p> <p><u>To link to the filing only, or to only page 1 of the filing, click <b>OK</b>.</u> The link to the citation will be added in your brief.</p> 

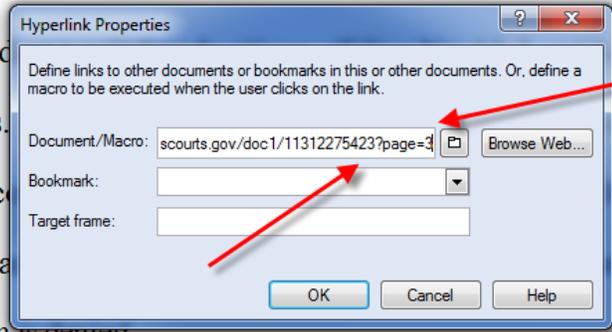
STEP	ACTION
5	<p>To link to the specific page number of the CM/ECF filing that you are citing,</p> <p>In the address box, scroll to or place your cursor at the end of the link address.</p> <p>Add the following text: <b>?page=&lt;page number&gt;</b> . For example,</p> <p>To link to page number 3 of a 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 to if they have been previously filed in CM/ECF.</p>

### Inserting CM/ECF links into your document—Corel WordPerfect

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

STEP	ACTION
1	<p>In the brief, use your cursor to select the citation you want to link.</p> <p>The defendant is a Colorado citizen. (Filing No. 13-2, at CM/ECF p. 3).</p>

STEP	ACTION
2	<p>From <b>Tools</b> on the menu bar, select <b>Hyperlink</b>.</p> 
3	<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> 
4	<p>Right-click in the <b>Document/Macro</b> box.</p> <p>Select <b>Paste</b>.</p> 
5	<p>The link to the first page of the filing will appear.</p> <p><u>To link to the filing only, or to only page 1 of the filing, click <b>OK</b>.</u></p> <p>The link to the citation will be added in your brief.</p> 

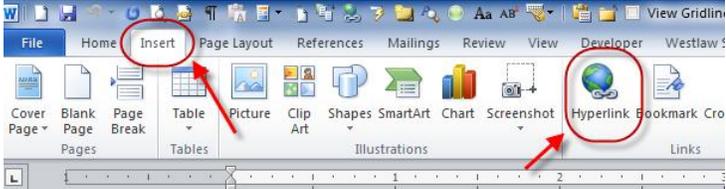
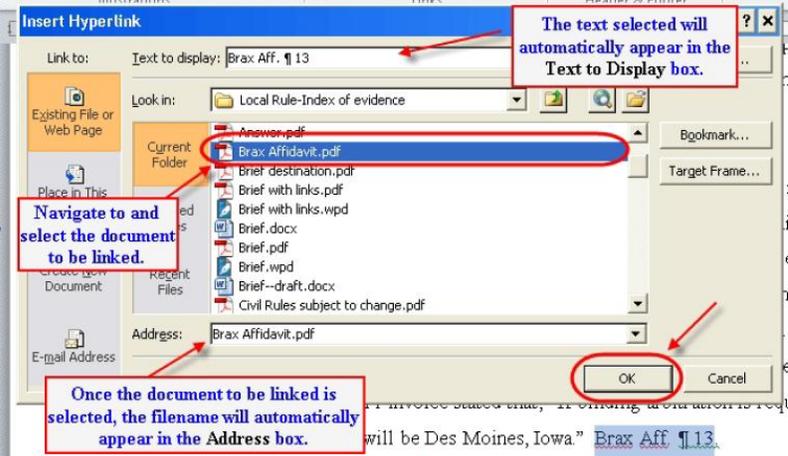
STEP	ACTION
6	<p>To link to the specific page number of a CM/ECF filing to which you are citing,</p> <p>In the address box, scroll to or place your cursor at the end of the link address.</p> <p>Add the following text: <b>?page=&lt;page number&gt;</b> . For example,</p>  <p>To link to page number 3 of 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> 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	Convert the brief to a PDF following the instructions below.
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>

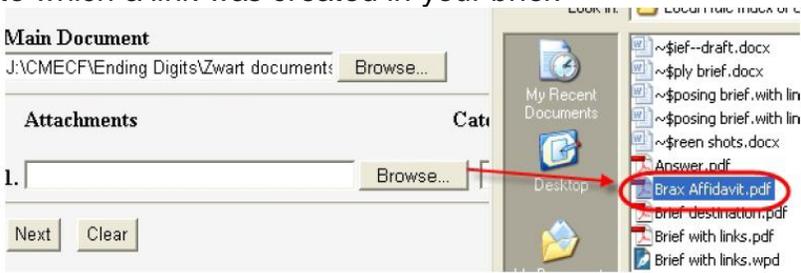
## Links to Attachments to a Brief being Filed in CM/ECF

### Adding Links to Attachments to a Brief being Filed—Microsoft Word

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 attachment documents you will cite in your brief into a single folder in your computer. The documents must be in PDF format.

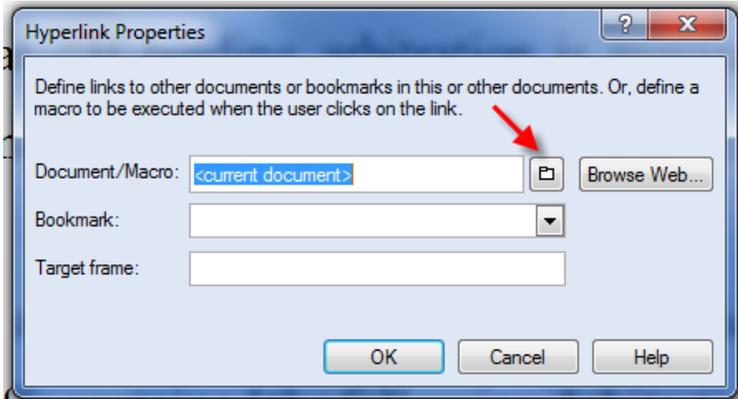
STEP	ACTION
2	While drafting your brief, include the citations to the documents saved in your computer.
3	<p>Using your cursor, select the text to which a link will be added.</p> <p>Plaintiffs have been Pioneer customers for more than 20 years, and Plaintiff Todd Wojtalewicz was a Pioneer Sales Representative for nearly two decades. <a href="#">Brax Aff. ¶ 4, 5.</a></p>
4	<p>On the <b>Insert</b> ribbon, select <b>Hyperlink</b>.</p> 
5	<p>In the <b>Insert Hyperlink</b> dialog box:</p> <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	<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  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).</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 <b>PDF</b> page number, not a Bates number or footer page number, for the citation.</p> 

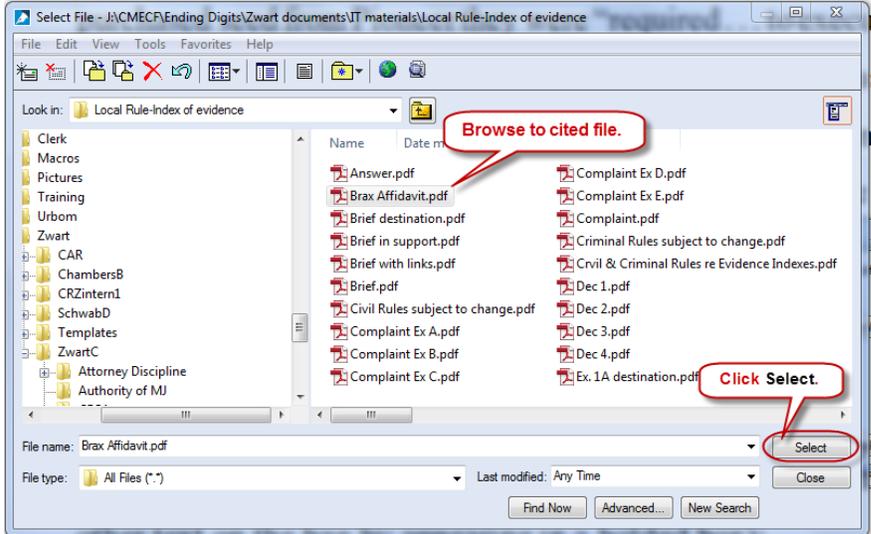
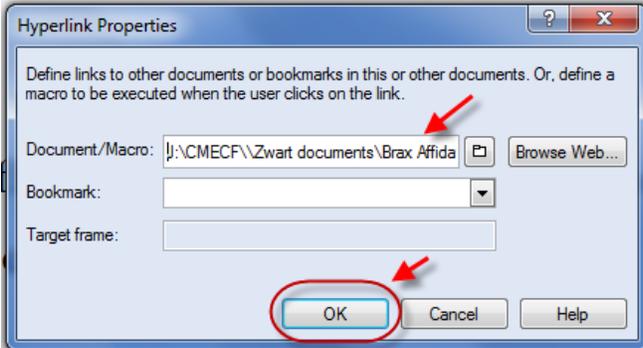
STEP	ACTION
7	Save the brief as a PDF as described in these instructions.
8	<p>File the brief and evidence as follows:</p> <p>a</p> <p>Following the normal procedure for filing briefs on CM/ECF, browse to and select your brief with links as the main document.</p>  <p>b</p> <p>Browse to and select as an <b>Attachment</b> each PDF file to which a link was created in your brief.</p>  <p>c</p> <p>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</p> <p>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>

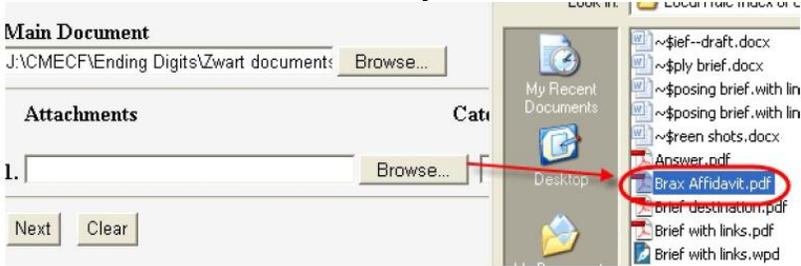
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## Adding Links to Attachments to the Document Being Filed—WordPerfect

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 <b>Hyperlinks Properties</b> dialog box will appear. Click the folder button.  

STEP	ACTION
	<p>Browse to and select the saved file you want to link.</p>  <p>Click on the file. The name of the file will appear in the File name box. Click <b>Select</b>.</p> <p>(<b>Note:</b> The file selected as the link must be in PDF format.)</p>
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  for any seed disputes, the 2011 invoice stated that, “If binding ar  bag), the place of arbitration will be Des Moines, Iowa.” <a href="file:///\\winstl1.ned.circ8.dcn\data\cmecf\ending%20digits\zwart%20documents\itmaterials\local%20rule-index%20of%20evidence\brax%20affidavit.pdf">Brax Aff. ¶ 13</a> (emphasis added).  Click to follow link</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 data-bbox="418 279 951 310">File the brief and evidence as follows:</p> <p data-bbox="508 352 1398 453">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 data-bbox="508 625 1398 695">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="508 1003 1398 1220">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 data-bbox="613 1419 1398 1488">Repeat the foregoing steps until all cited evidence is filed as an attachment to your brief.</p> <p data-bbox="508 1520 1398 1698">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>

## 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.thomsonreporters.com/law-products/solutions/brief-tools?searchterms=brief+tool">http://legalsolutions.thomsonreporters.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.\*

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	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		

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\* 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>2</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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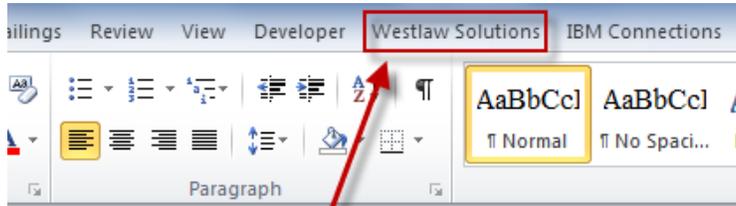
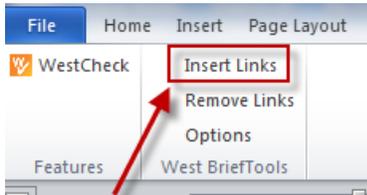
## Installing Westlaw InsertLinks

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—Microsoft Word

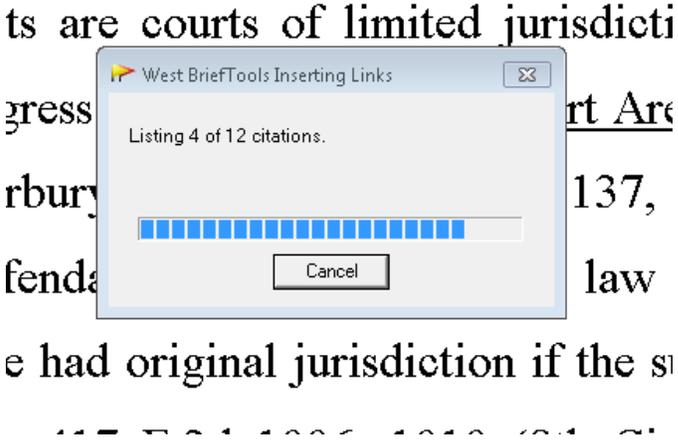
Once InsertLinks software is installed, Westlaw links can be installed automatically in Microsoft Word documents using the following steps:

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>

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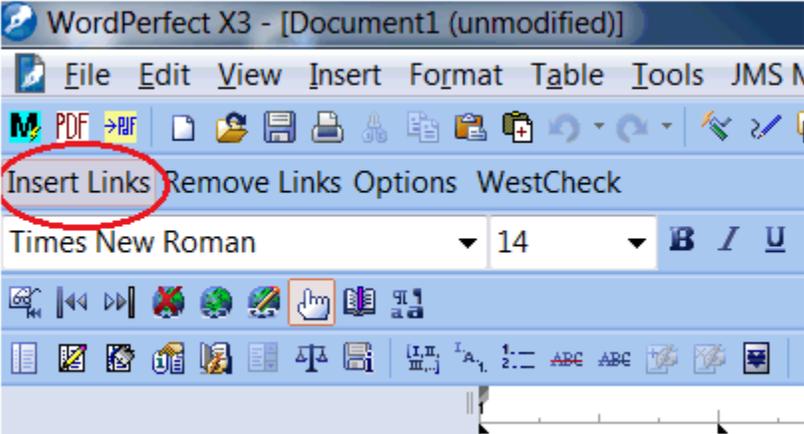
<sup>2</sup> Currently, InsertLinks is not compatible with, and cannot be used for, automatically inserting links into WordPerfect X6 documents. It does, however, work with prior versions of WordPerfect.

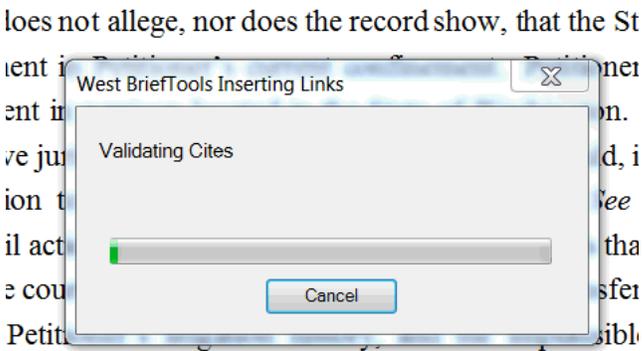
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STEP	ACTION
3	<p>The InsertLinks software will begin searching the document for citations and inserting the appropriate links.</p>  <p>The box depicted above will disappear when the process is complete and all links are installed.</p>

### Using West InsertLinks—Corel WordPerfect

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>  <p>Select <b>Insert Links</b> from the menu bar.</p>

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.” <a href="#">Demos v. United States Secretary of Defense, C.A. No. 12-12398-PBS, 2013 WL 80167 (D. Mass. Jan. 3, 2013)</a>.</p>

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### Shepard’s Links 2008

Shepard’s Links is a Lexis computer software program which scans Microsoft Word or Corel WordPerfect<sup>3</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.

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### Installing Shepard’s Links

Shepard’s Links is part of the Shepard’s BriefSuite.

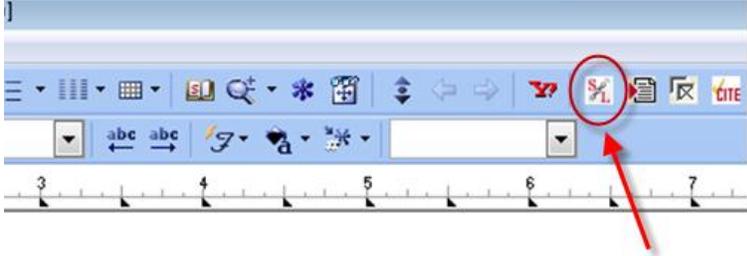
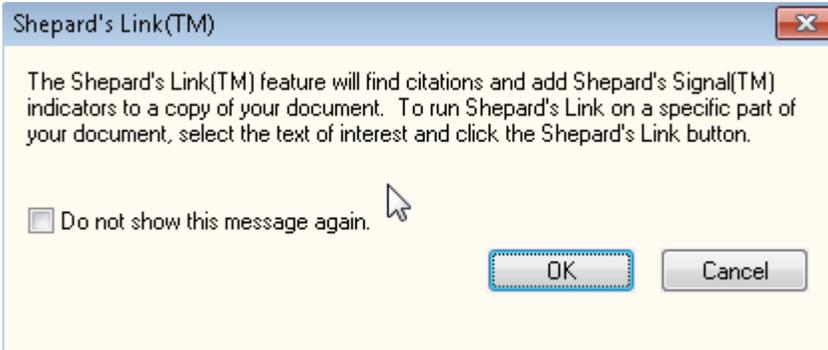
- Shepard’s BriefSuite has not been updated since 2008.
- The attached BriefSuite software download instructions provides a step-by-step description on how to install Shepard’s BriefSuite.

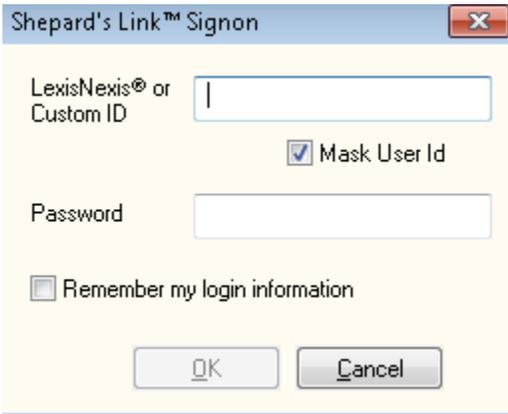
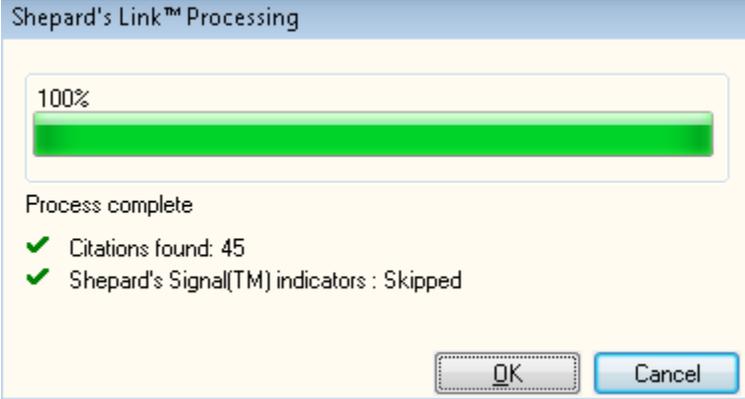
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<sup>3</sup> See compatibility graph above.

## Using Shepard's Links— Corel WordPerfect

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>  <p>THE UNITED STATES DISTRICT COURT FOR THE DISTRICT OF KANSAS</p> <p>idually and on behalf ) uated, )</p>
2	<p>Click the checkbox (optional) and click <b>OK</b>.</p> 

STEP	ACTION
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

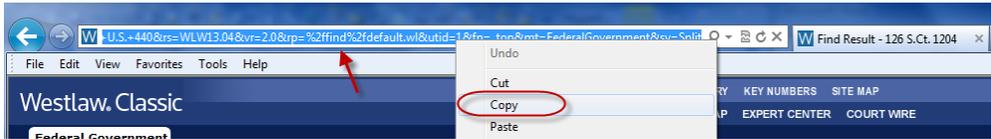
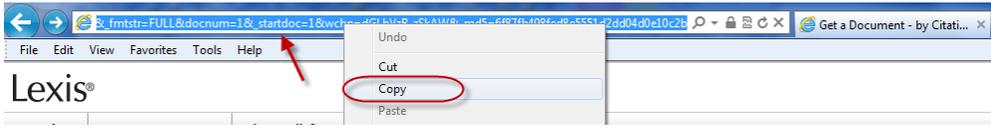
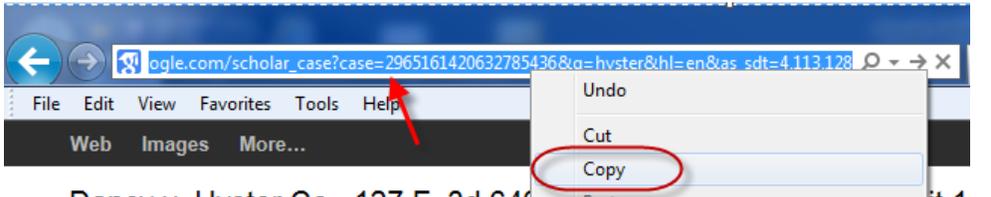
As previously described, hyperlinks to documents filed on CM/ECF can be manually added to a document. It is also possible to manually create links to documents available through commercial legal websites (e.g., Lexis or Westlaw), and those posted on the court's website (Local Rules).

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.

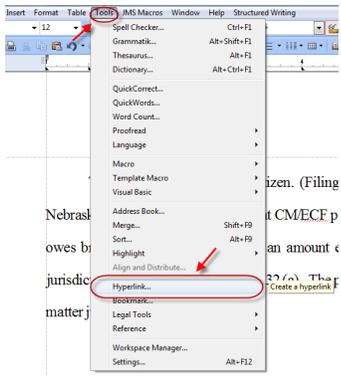
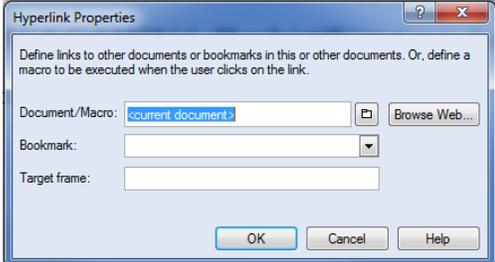
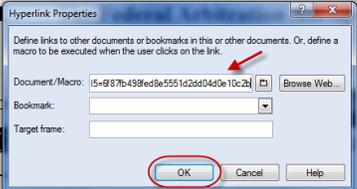
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### Manually Creating Links to Online Research Resources

The process for manually adding links to Westlaw, Lexis, Google Scholar, or any other online research resource (LoisLaw, FastCase, etc.) is essentially 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>  <p>OR</p>  <p>OR</p> 

STEP	ACTION
3	<p data-bbox="418 258 862 289">For Microsoft Word documents:</p> <p data-bbox="451 321 1341 384">a Select the <b>Insert</b> ribbon, then select <b>Hyperlink</b>. An <b>Insert Hyperlink</b> dialog box will appear.</p> <div data-bbox="526 394 1406 680"> </div> <p data-bbox="526 699 1373 762"><b>Note:</b> The text you selected will automatically appear in the “<b>Text to display</b>” line.</p> <p data-bbox="451 804 1373 909">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> <div data-bbox="626 919 1304 1119"> </div> <p data-bbox="526 1150 659 1182">Click <b>OK</b>.</p> <p data-bbox="451 1203 1211 1224">c The link to the citation will be added in your brief.</p> <div data-bbox="553 1224 1390 1434"> <p data-bbox="902 1224 1032 1245"><b>ARGUMENT</b></p> <p data-bbox="553 1276 1390 1434">I. <b>The Federal Arbitration Act Provision.</b>  The United States Supreme Court in <i>AA</i> “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> </div>

STEP	ACTION
4	<p>For WordPerfect documents:</p> <p>a From <b>Tools</b> on the menu bar, select <b>Hyperlink</b>.</p>  <p>b 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></p>  <p>c Right-click in the <b>Document/Macro</b> box. Select <b>Paste</b>.</p>  <p>d Click <b>OK</b>.</p>  <p>e The link to the citation will be added in your brief.</p> <p>The United States Supreme Court has held that “policy favoring arbitration.” <a href="https://www.leis.com/research/retrieve?ms=64693d9bb244b8b400049179777118cb8cvc=1e8&amp;form=by:Citation&amp;fmttr=FULL&amp;docnum:1&amp;_startdoc=1&amp;wchp=dGLbVzB-zSKAW8_md5=6f67fb49f8e8e5551d2dd404d0e10c2b">Buckeye Check Cashing, Inc. v. The Ohio State Credit Union</a> (2006). See also <a href="#">Mastrobuono v. Shearson Lehman Hutton, Inc.</a>, 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>OR</p>  </div>
3	<p>Referring to the previous section, “<b>Manually Creating Links to Online Research Resources</b>,”</p> <ul style="list-style-type: none"> <li>• for Microsoft Word documents, complete Step 3; and</li> <li>• for WordPerfect documents, complete Step 4.</li> </ul>

## 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.

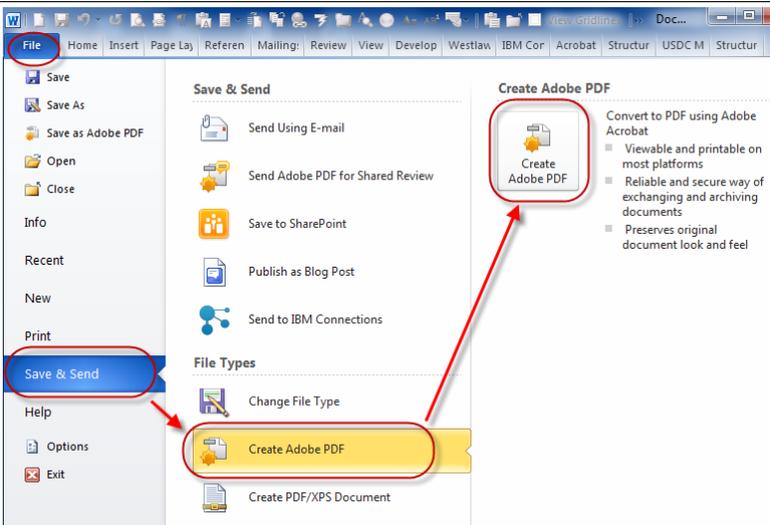
Once all links are in the document, use your word processing software to save or convert your briefs, or other documents you have created for filing, in a PDF format.

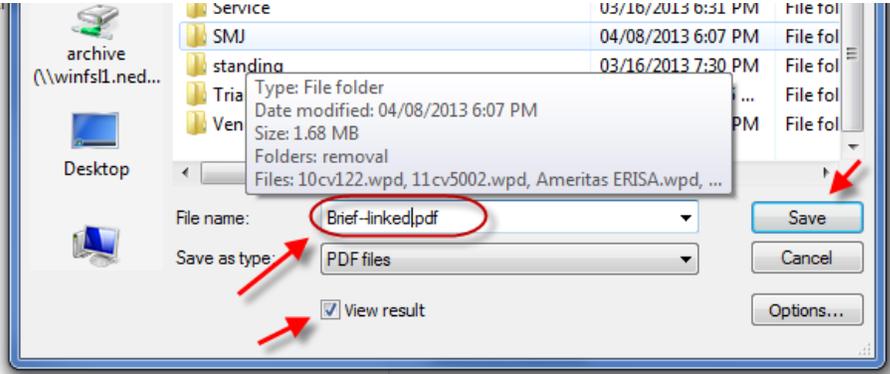
Note: Do **NOT** use Print to PDF to create a PDF of a brief with hyperlinks—the hyperlinks will be lost. Do **NOT** print the document and scan it to PDF format.

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### Conversion to PDF—Microsoft Word

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

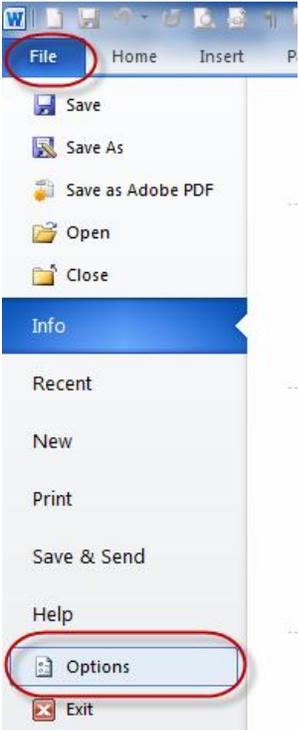
STEP	ACTION
1	<p>Select the <b>File</b> tab on the MS Word ribbon;</p> <p>from the drop-down menu, select <b>Save and Send</b>;</p> <p>and from the choices now available,</p> <p>choose <b>Create Adobe PDF</b> from the <b>File Types</b> list,</p> <p>then</p>  

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>

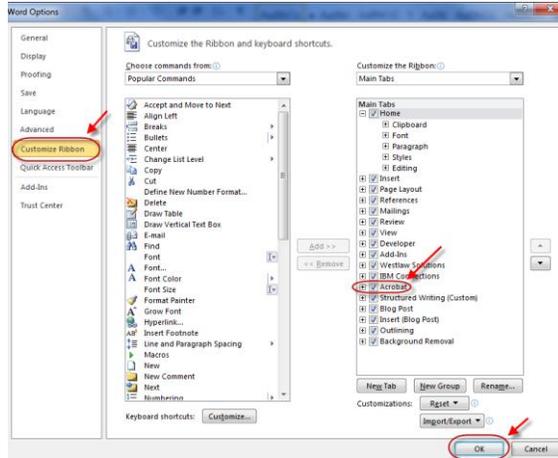
**Note:** You may also add the Adobe Acrobat tab to your MS Word ribbon and use that tab to convert documents to PDF.

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

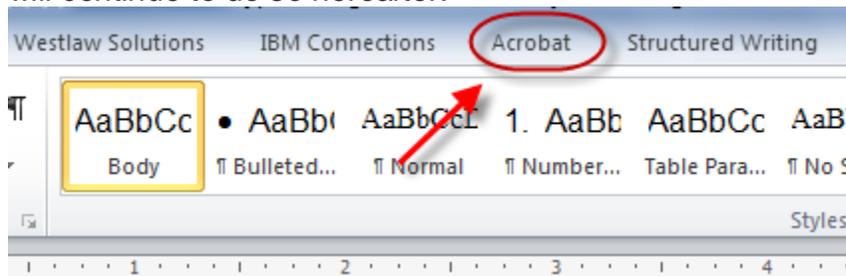
Choose **Options**.



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.



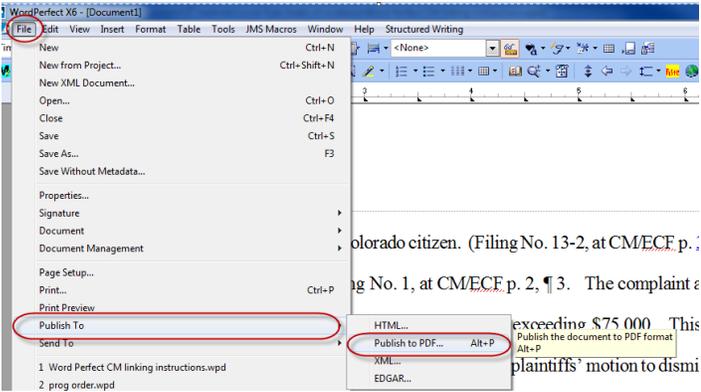
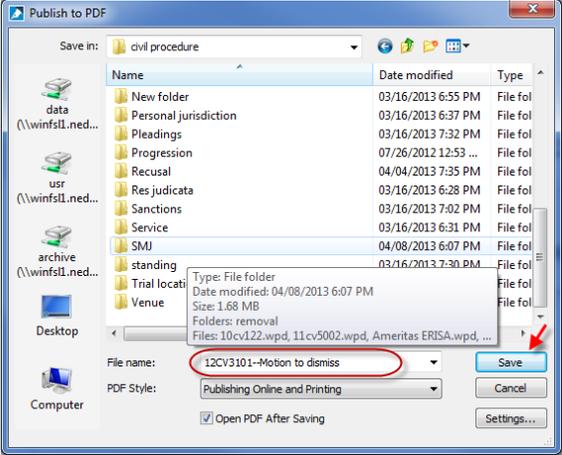
After the **Acrobat** tab is added, save a document as a PDF by selecting the **Acrobat** tab, and then **Create PDF**.



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.

## Conversion to PDF—Corel WordPerfect

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

STEP	ACTION
<p>1</p> <p>Select <b>File</b> →</p> <p><b>Publish To</b> →</p> <p><b>Publish to PDF.</b></p> <p>Or</p> <p>Type <b>Alt + P.</b></p>	 <p>The screenshot shows the WordPerfect X6 File menu. The 'Publish To' option is circled in red. A sub-menu is open, showing 'Publish to PDF...' also circled in red. The keyboard shortcut 'Alt+P' is visible next to it. Other options in the sub-menu include HTML, XML, and EDGAR.</p>
<p>2</p> <p>The <b>Publish to PDF</b> dialog box will open.</p> <p><b>Browse</b> to the file location for saving the file.</p> <p>Name the file.</p> <p>Click <b>Save.</b></p> <p>A PDF will be created with active links.</p>	 <p>The screenshot shows the 'Publish to PDF' dialog box. The 'Save in' location is 'civil procedure'. The file name is '12CV3101--Motion to dismiss'. The 'PDF Style' is 'Publishing Online and Printing'. The 'Save' button is highlighted with a red arrow.</p>
<p>3</p>	<p>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.</p>

This Guide was produced through the collaborative efforts of judges, IT and Clerk’s office personnel, educators, and library staff. Please share your comments, questions, corrections, and experiences with hyperlinking or using this Guide by contacting:

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[cheryl\\_zwart@ned.uscourts.gov](mailto:cheryl_zwart@ned.uscourts.gov)  
 (402) 437-1670