Welcome

Slide notes: Welcome to the module on Cross-Document Hyperlinks in CM/ECF. In this module we will be using Microsoft Word.

Navigation

Slide notes: Here are the instructions on how to navigate through this electronic learning module. When you're ready to begin, click the Start button.

Objectives

Slide notes: In this module we will simulate creating two references, or hyperlinks, to two documents. One is located in the Southern District of New York Bankruptcy Court and the other is located on your local hard drive.

This lesson will entail six steps. First, we'll locate the document we want to create a hyperlink to by running a docket report for the case in the Southern District of New York Bankruptcy Court. When we find it, we'll copy the document's address (called the URL, or Uniform Resource Locator) to the Windows clipboard. Next, we'll open our document in Microsoft Word and add a hyperlink to the cited case. Next, we'll create a hyperlink to a PDF document which is an Exhibit in the brief we are working on. Then we'll publish the Word document to PDF so it will be ready to file in CM/ECF. Once it's published to PDF, we'll open the PDF file and test the hyperlinks to make sure they link to the documents we want to reference.

Please click CONTINUE.

Hyperlink Efficiency

Slide notes: Hyperlinks may be used to link a word or phrase in one document to:

Another location within the same document.

An attachmet to the document being filed.

Traditional citations of authorities.
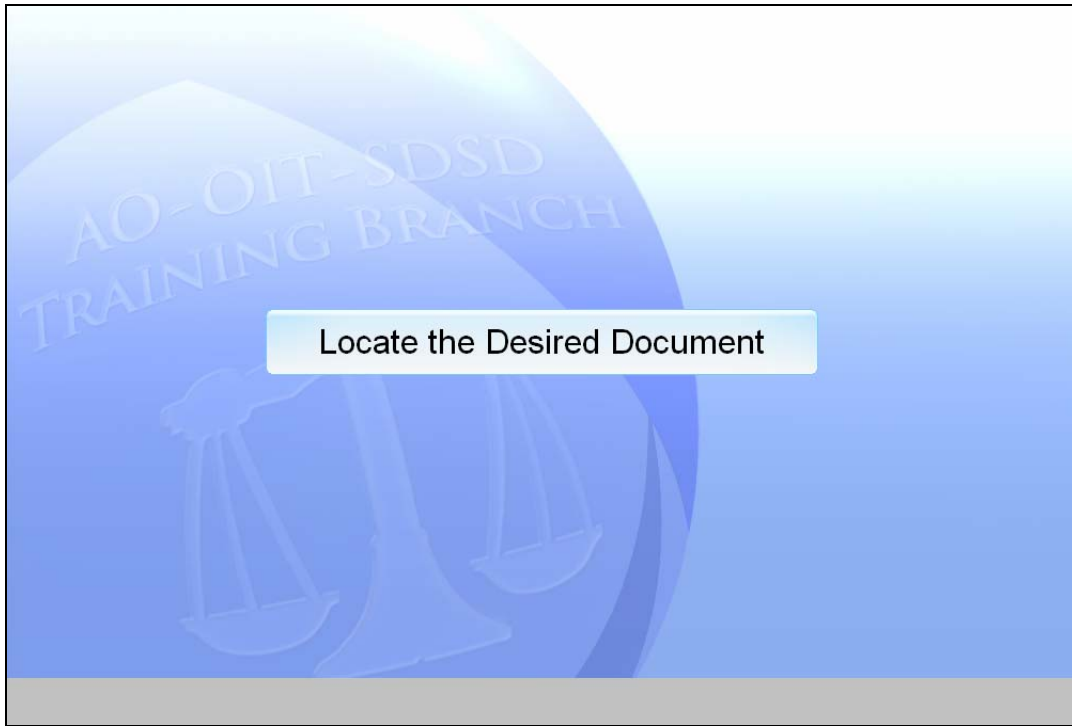
A case on CM/ECF in your district.

A CM/ECF case in another bankruptcy, district or appellate court.

In this module you will learn the steps required to create:

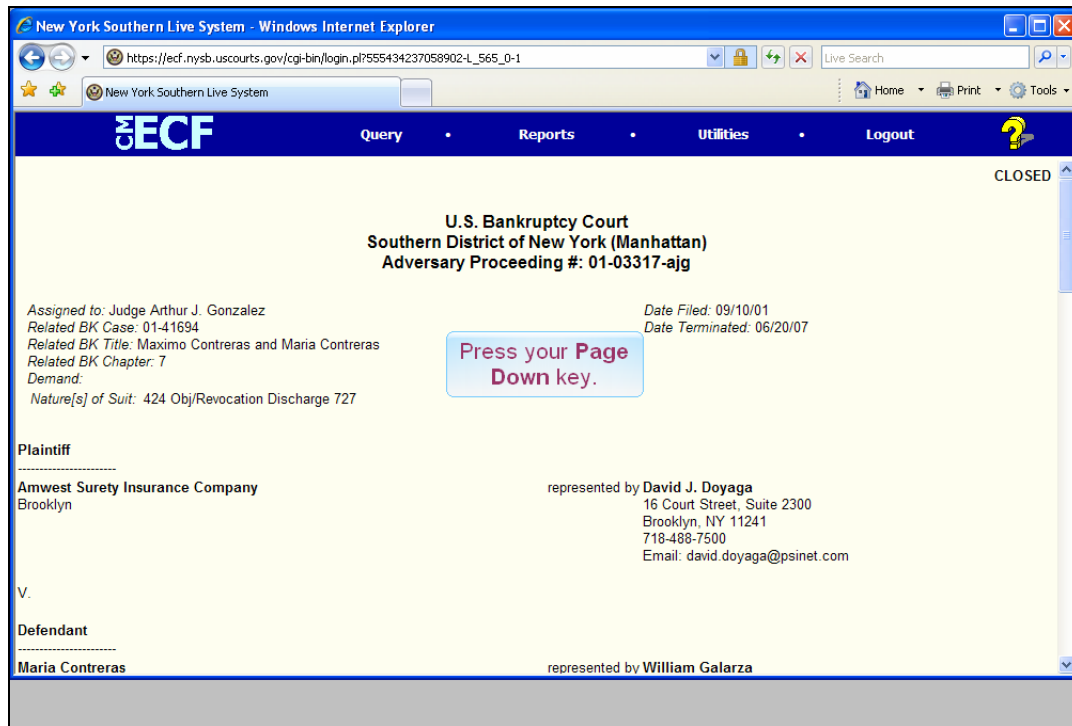An external link to another bankruptcy case in another court.

An internal link to an attachment to the document you are filing.

Click CONTINUE.

Locate the Desired Document
Slide notes: Since the supporting citation is from a case in another court, we will access this case through PACER.

Slide 6

Slide notes: We've already logged in to PACER and run the docket report for the adversary proceeding in the Southern District of New York. The document we want to refer to in our brief is document number 14. To move to document number 14, press the Page Down key on your keyboard several times.

Slide 7

Slide notes: (Note: This is a transition slide.)

Slide 8

Slide notes: (Note: This is a transition slide.)

Slide 9

Slide notes: And now we can see document number 14, a Findings of Fact and Conclusions of Law.

Remember, each document that is underlined and in blue in this docket sheet has a unique Internet address. In browser terminology, this address is referred to as a Uniform Resource Locator, or URL. We're going to copy the URL for document number 14 and place it in our brief in Microsoft Word.

Copy the URL

Slide notes: (Note: This is a transition slide.)

Slide 11

Slide notes: In order to copy the URL, we need to Right-Click on the document number. This right-click will cause the browser to pop up a menu that contains a choice to copy the URL.

Watch the screen and I'll do the right-click for you.

Slide 12
Slide notes:

Slide 13

Slide notes: One of the options is Copy Shortcut. By the way, in this example we are using Internet Explorer version 7. Other browsers have a similar capability but the menus may be styled differently. When you click Copy Shortcut, Windows will copy the URL for document numbe 14 to its clipboard. Click that option.
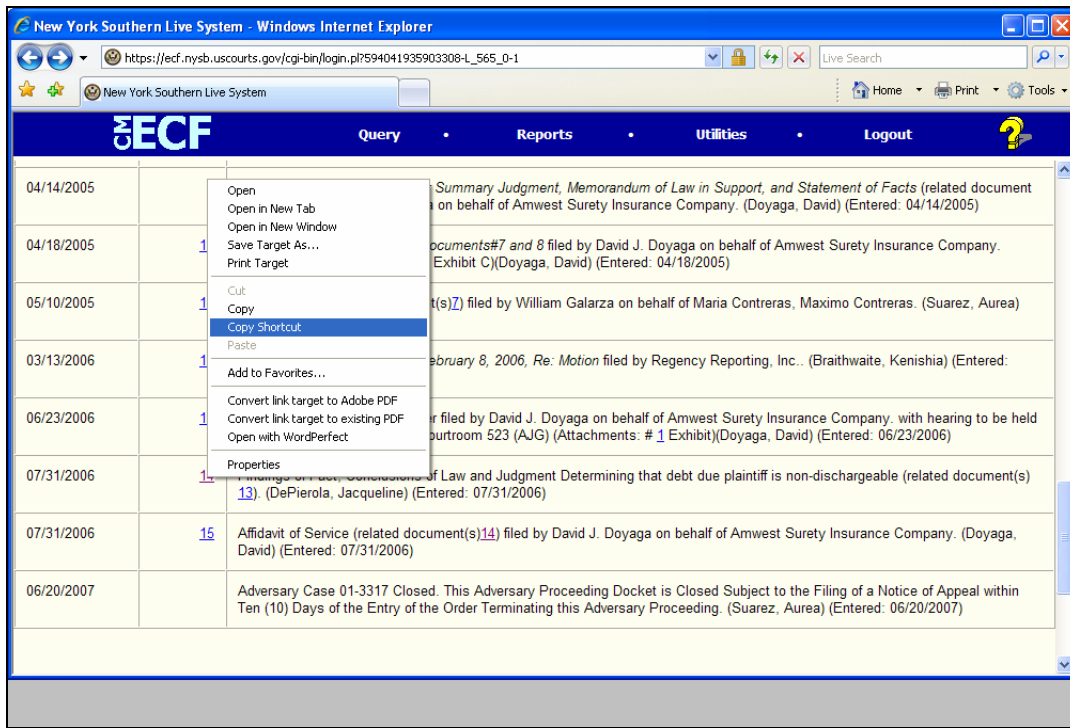
Slide 14
Slide notes: (Note: This is a transition slide.)

Slide 15

Slide notes: Now that Windows has a copy of the URL for document number 14 in its clipboard, we're done with this docket report and we will log out of this New York Southern case on PACER.

On the CMECF main menu, click Logout.
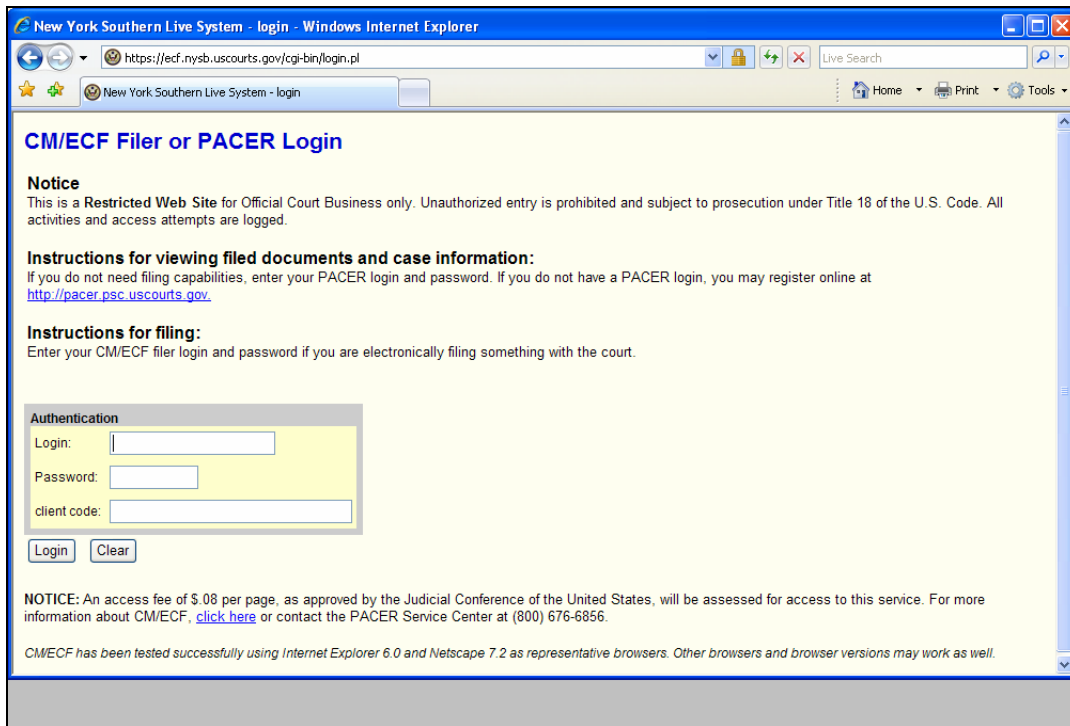
Slide 16
Slide notes: (Note: This is a transition slide.)

Create the Hyperlink

Slide notes: Now, let's create the hyperlink in Word.
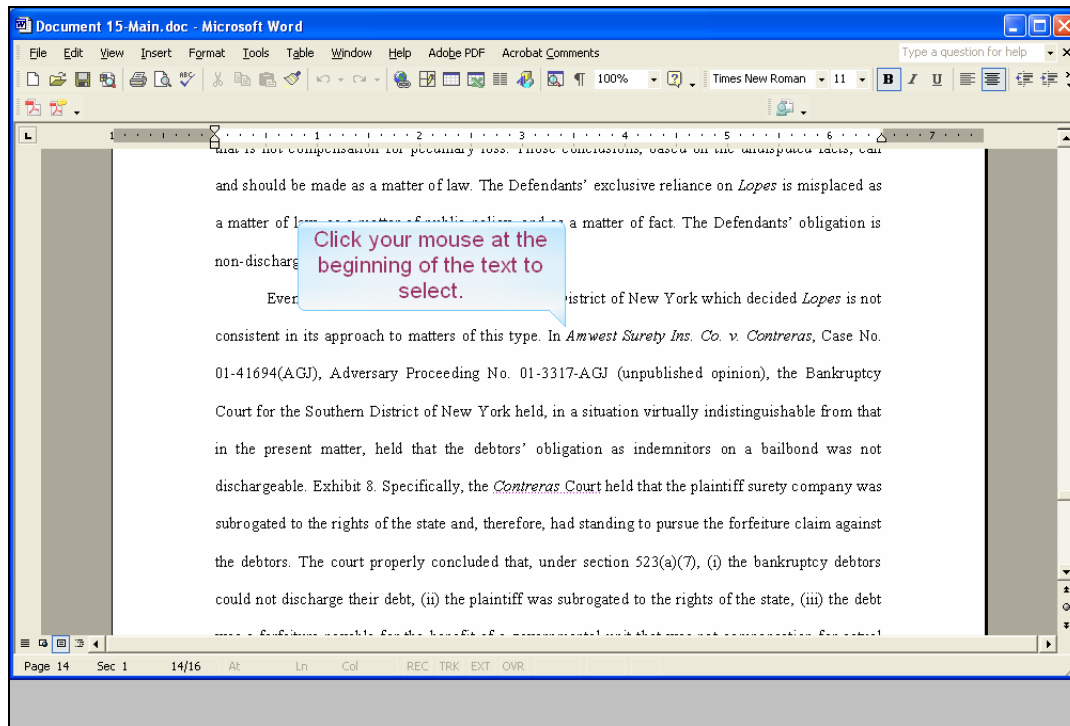
Slide 18

Slide notes: We've switched over to Microsoft Word and are editing our brief. In this lesson we're using Microsoft Word 2002.

In the text of our brief, we refer to Amwest Surety Ins. Co. v. Contreras from the Bankruptcy Court in the Southern District of New York. In order to make this text into a hyperlink to the actual document, we must first select the text that will become the hyperlink. There are several ways to select text in Microsoft Word. We'll use the Click - Shift Click method. This means to click the mouse at the beginning of the text to be selected, then hold down the shift key and click at the end of the text to be selected. All text between the click and the shift click will be selected.

Point your mouse at the beginning of the text and click once.
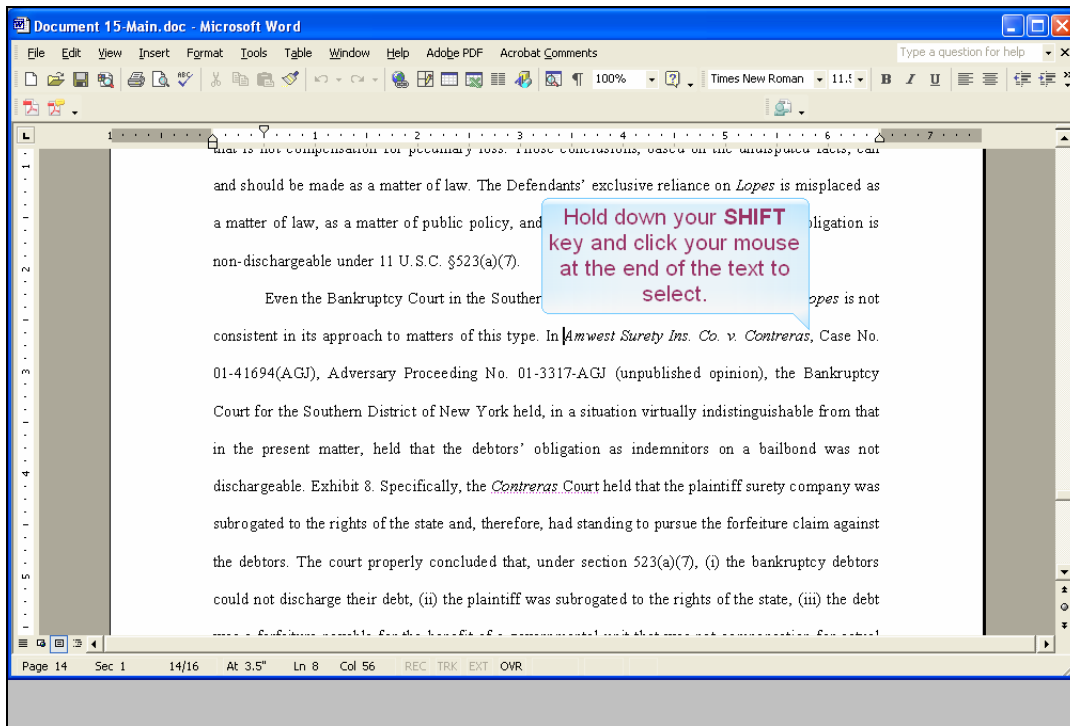
Slide 19

Slide notes: Now hold down the SHIFT key and click once at the end of the desired text.
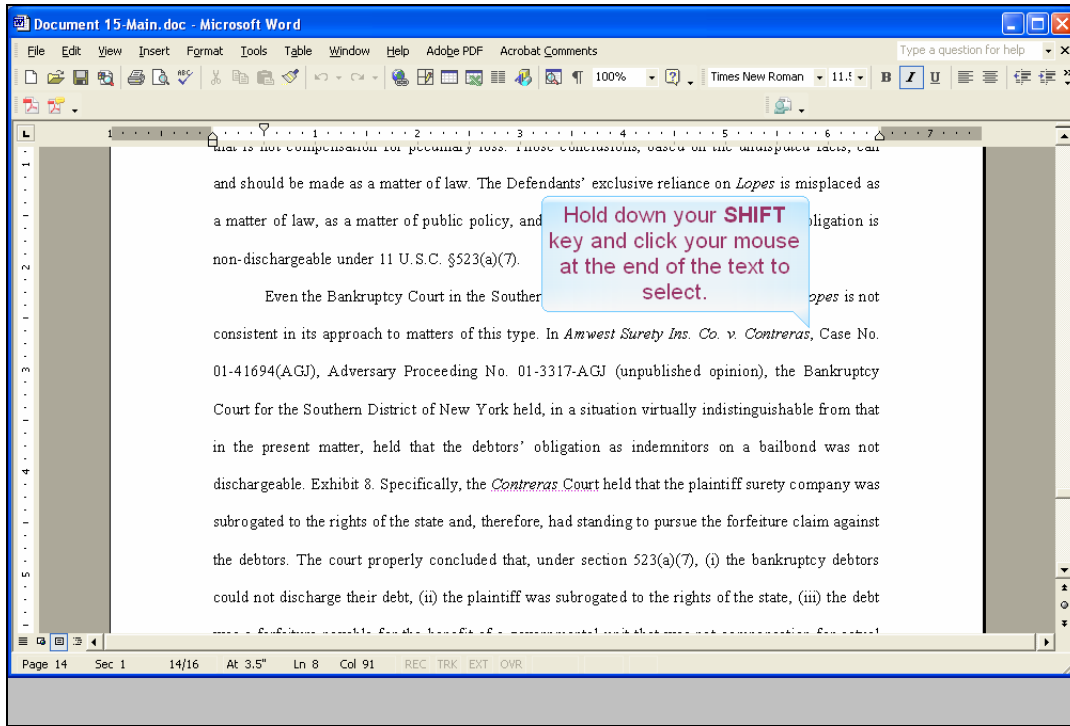
Slide 20
Slide notes:
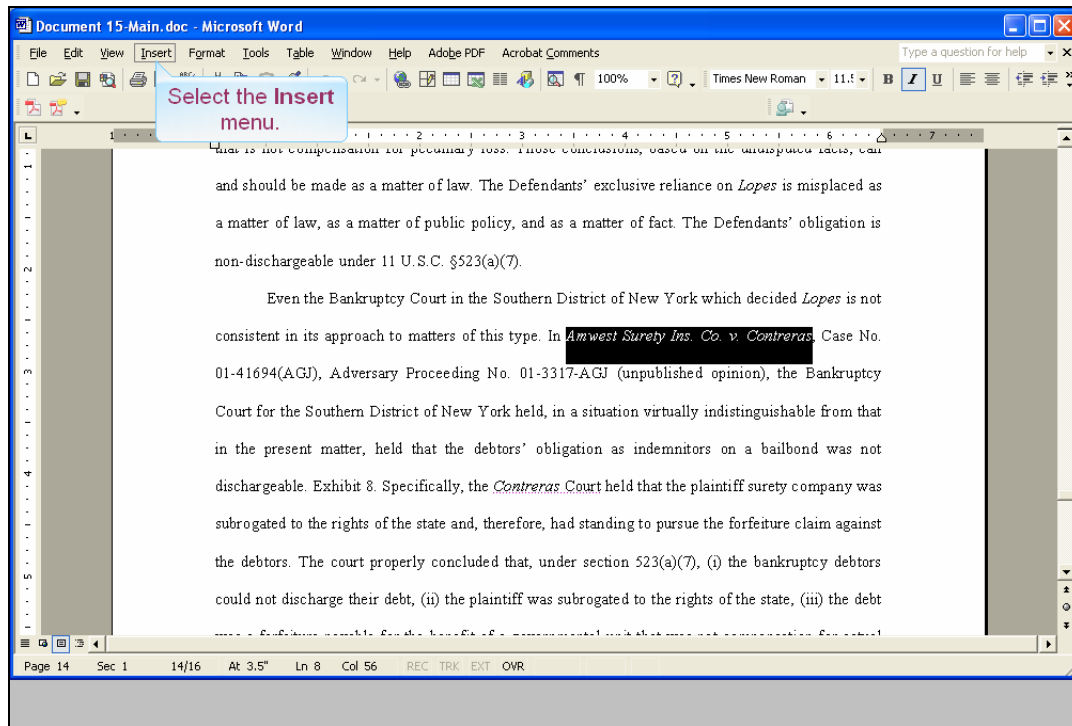
Slide 21

Slide notes: Word now selects the text.

To create the hyperlink for the selected text, click Insert on the toolbar.
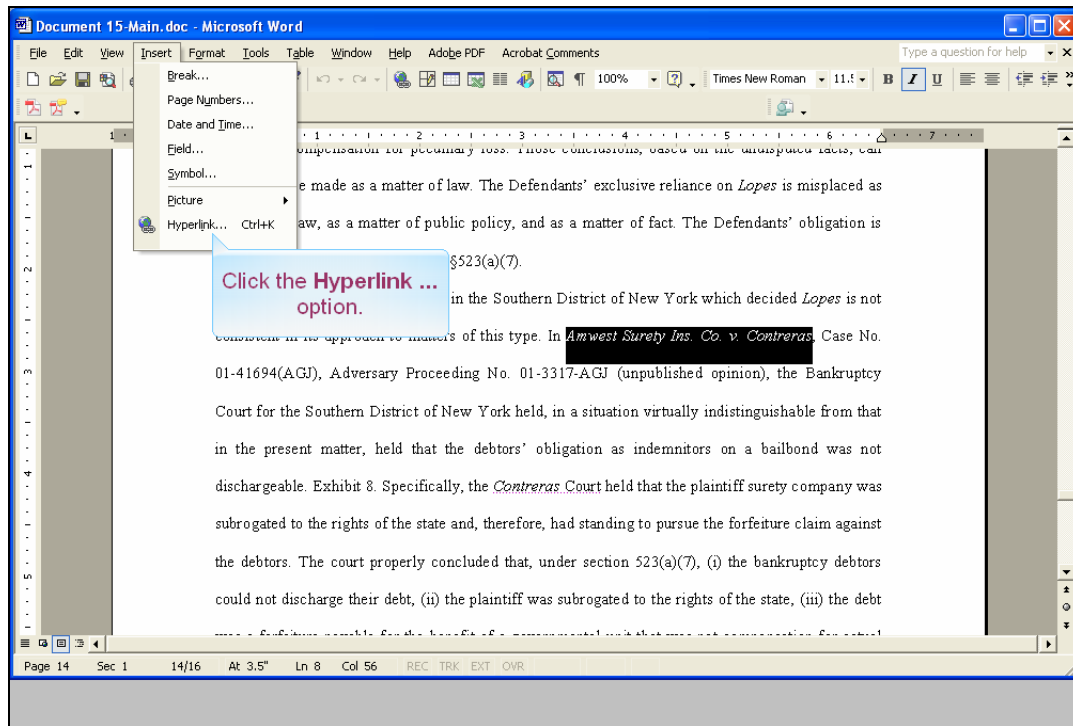
Slide 22
Slide notes: From the drop-down menu, select Hyperlink ...
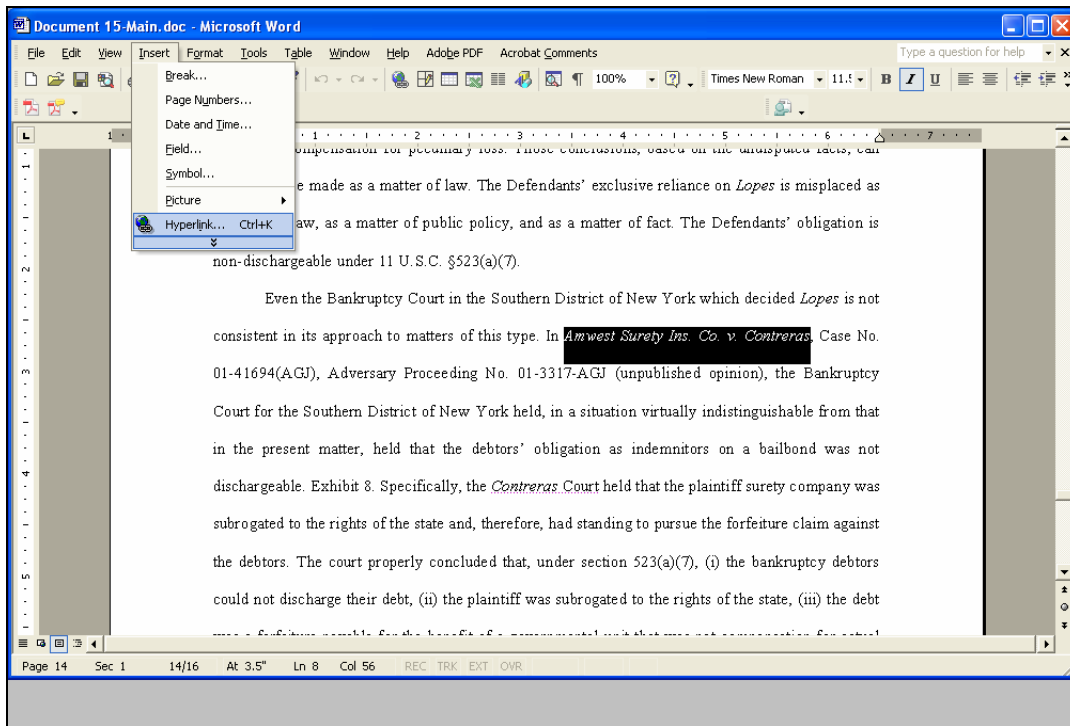
Slide 23
Slide notes: (Note: This is a transition slide.)
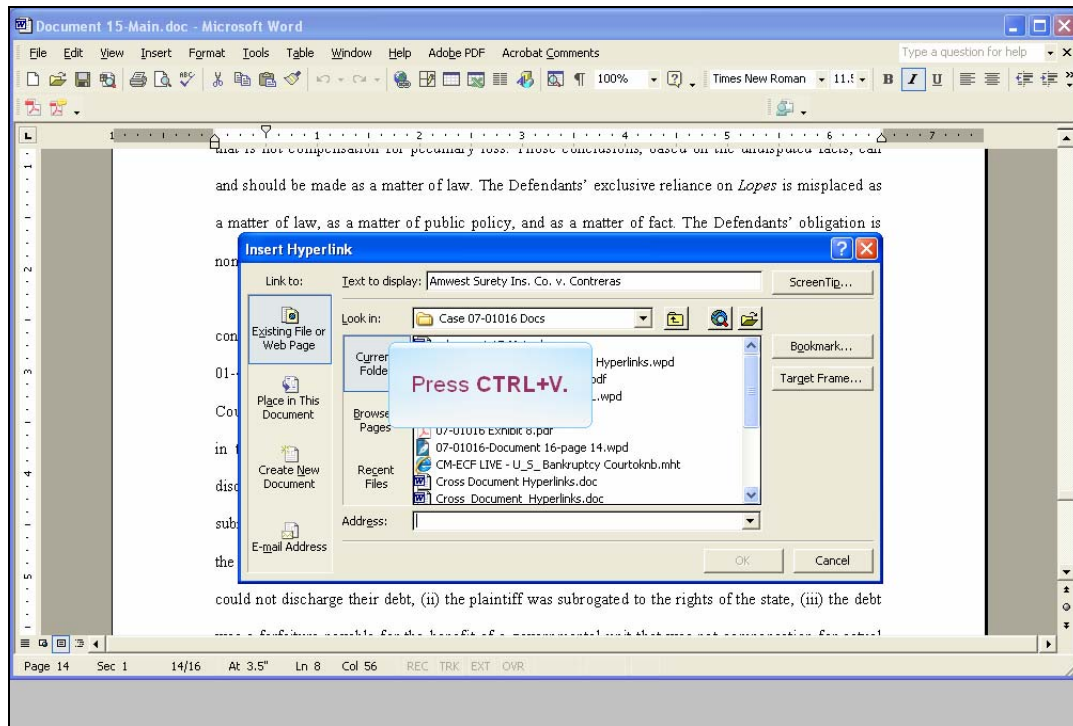
Slide 24

Slide notes: An Insert Hyperlink dialog box opens. We're going to paste the URL that Windows copied to the clipboard earlier into the (Address:) field. Like selecting text, there are

several ways to paste the clipboard contents. We'll use the keyboard shortcut keystrokes of CTRL+V. The URL will be pasted into the (Address:) field since the

cursor is located in that field. Hold down your control key and type the letter V.
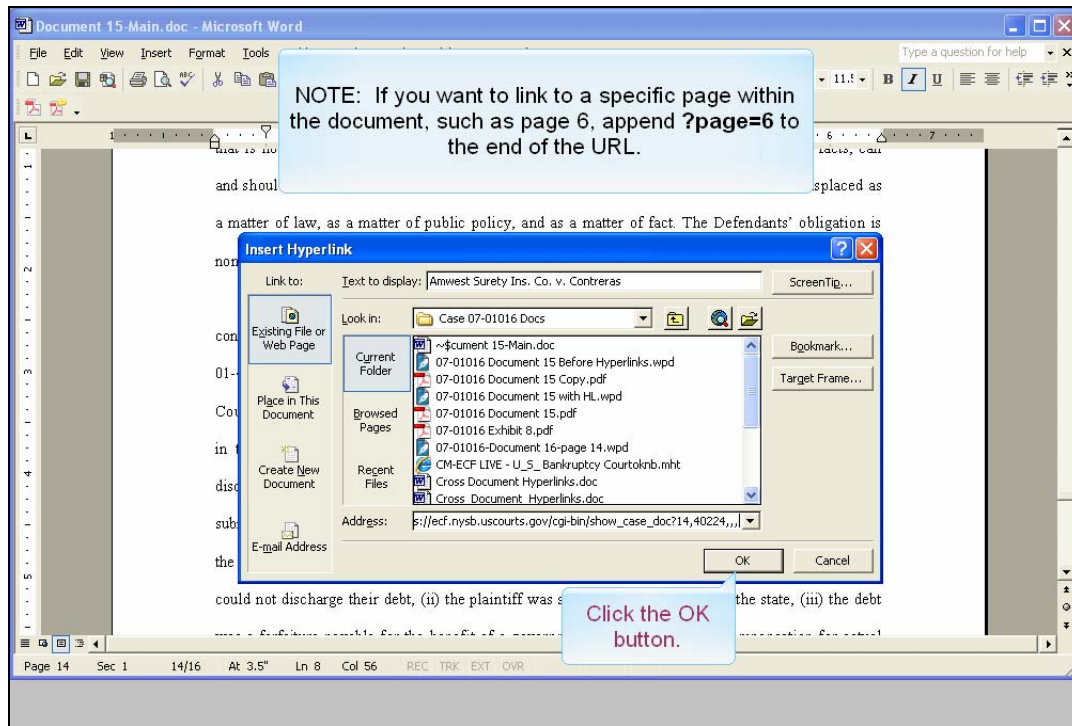
Slide 25
Slide notes: s
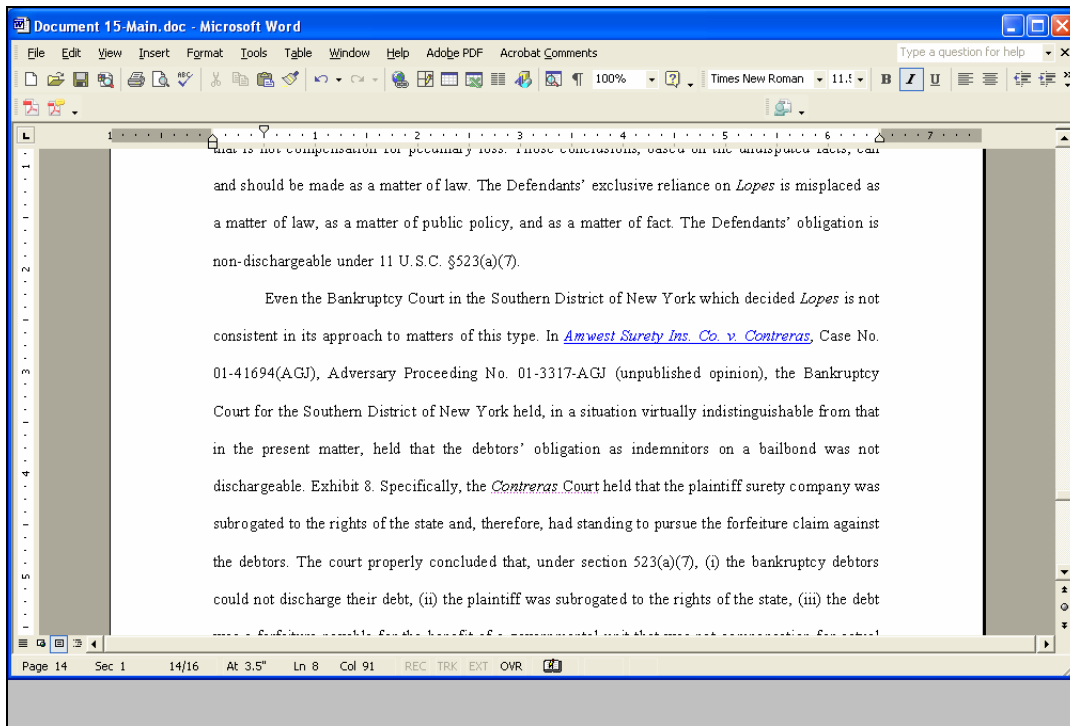
Slide 26
Slide notes: Word has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue.
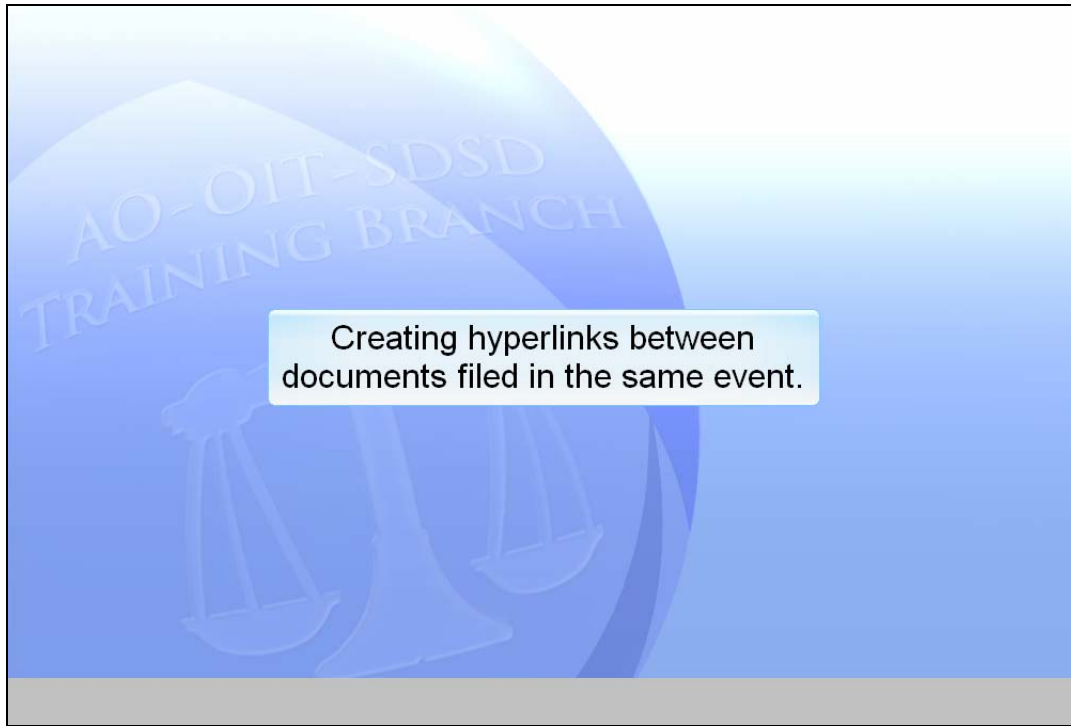
Hyperlinks - Documents filed in the same event

Slide notes: Before we publish this Word document to PDF, let's create a hyperlink between documents filed in the same event. Instead of linking to a previously-filed document, you can link a document to one which will be filed in the same event. We will create a hyperlink in our brief to an attachment to that brief. The procedure is different, since the referenced document does not yet have an address in CM/ECF. When you create this type of link, it points to the referenced document where it exists on your local PC. When the documents are filed in CM/ECF, the link is converted to a CM/ECF URL. We'll look at this process now.
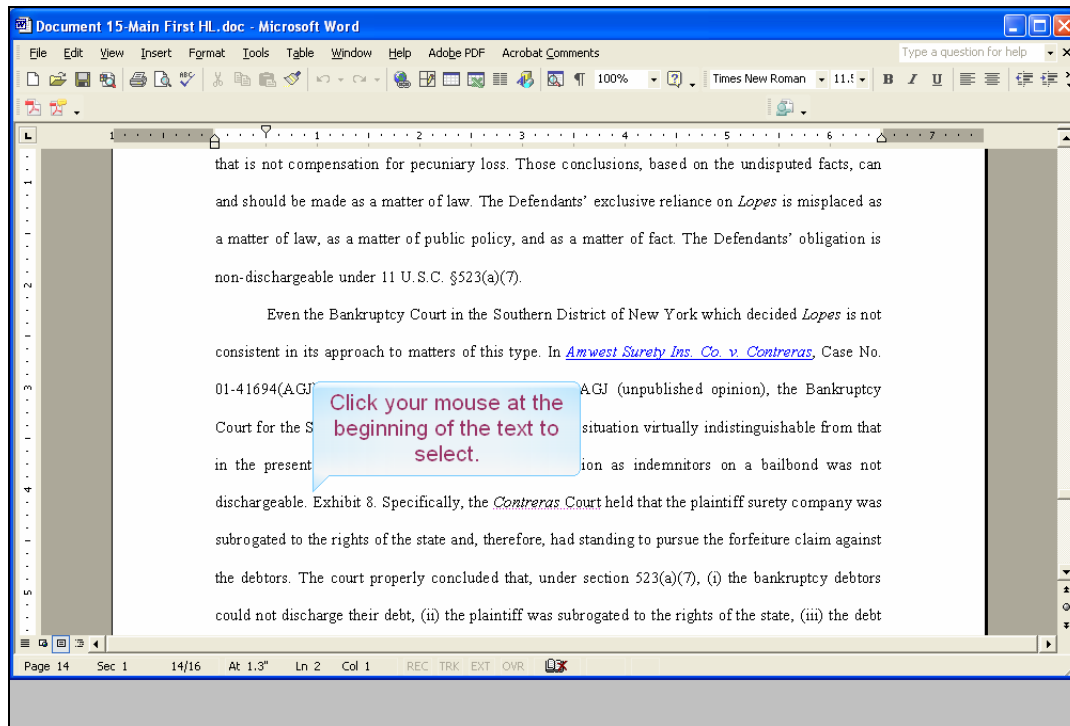
Slide 28

Slide notes: We are once again editing our brief in Word. We want to create another hyperlink using the text "Exhibit 8" that will point to this PDF document currently located on our hard drive. We first must select the text that will become the hyperlink. We will again use the Click - Shift Click method to select the text. Point your mouse at the beginning of the text to select and click once.
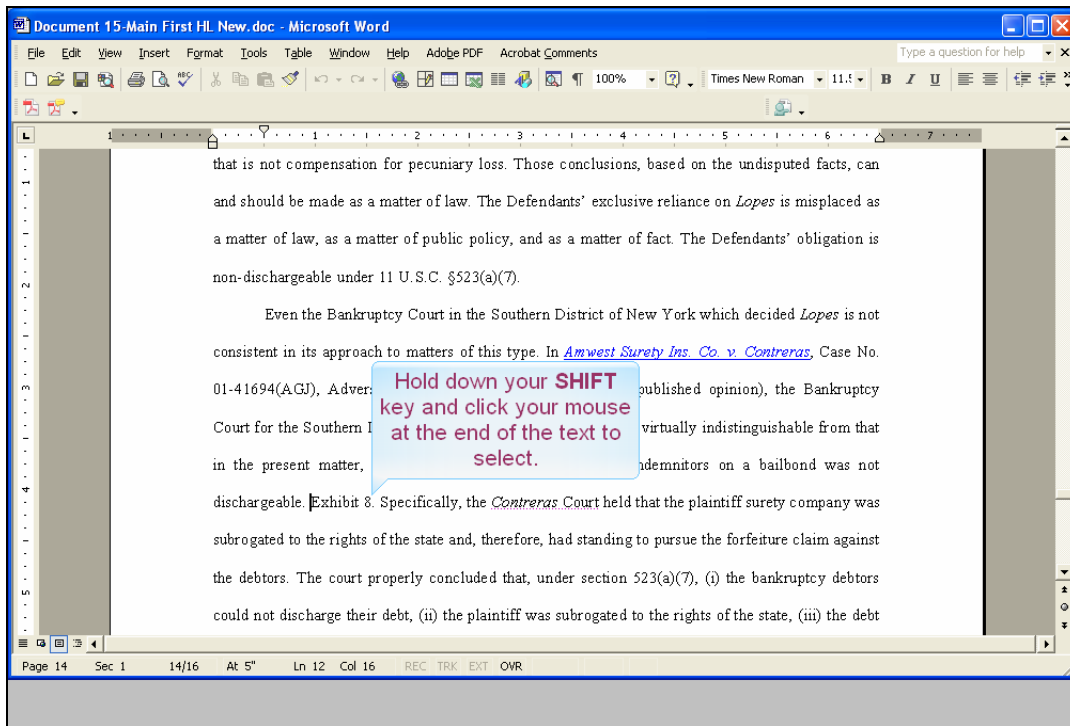
Slide 29
Slide notes: Now hold down the SHIFT key and click once at the end of the desired text
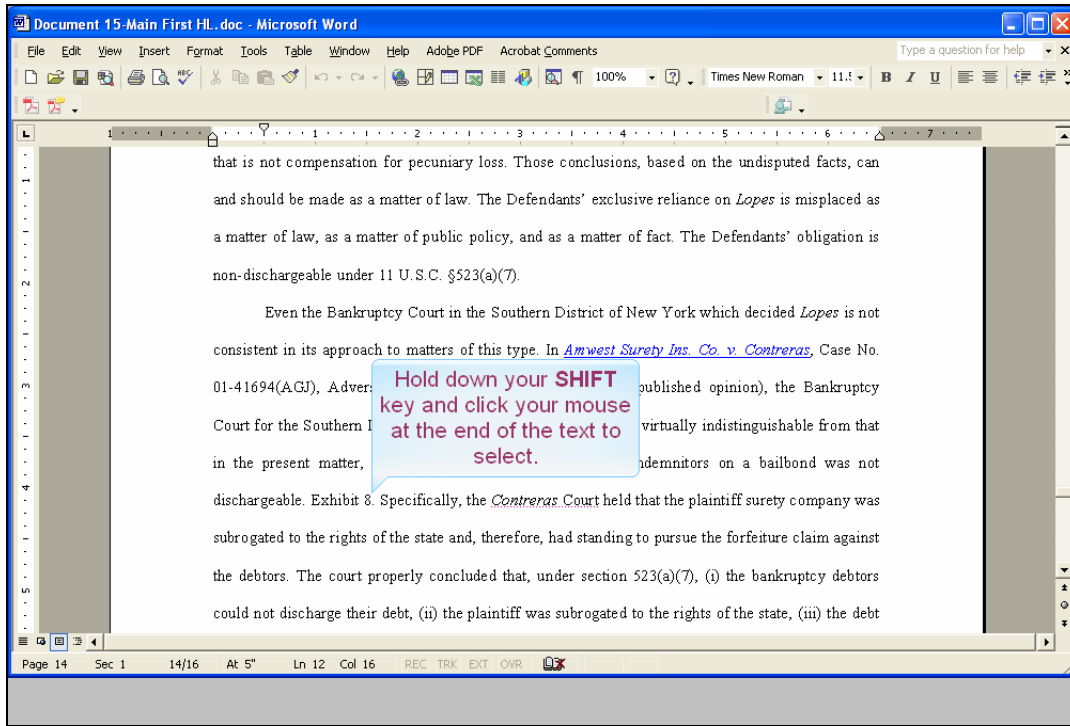
Slide 30
Slide notes:
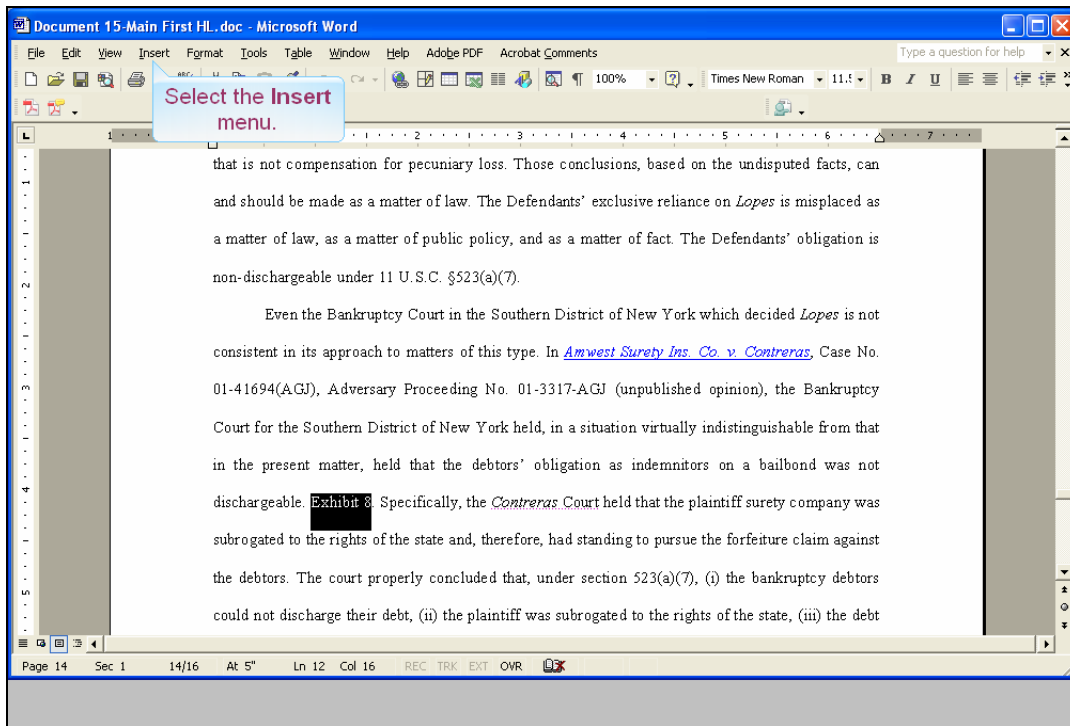
Slide 31

Slide notes: Word selects the text. Now, click the Insert menu item.
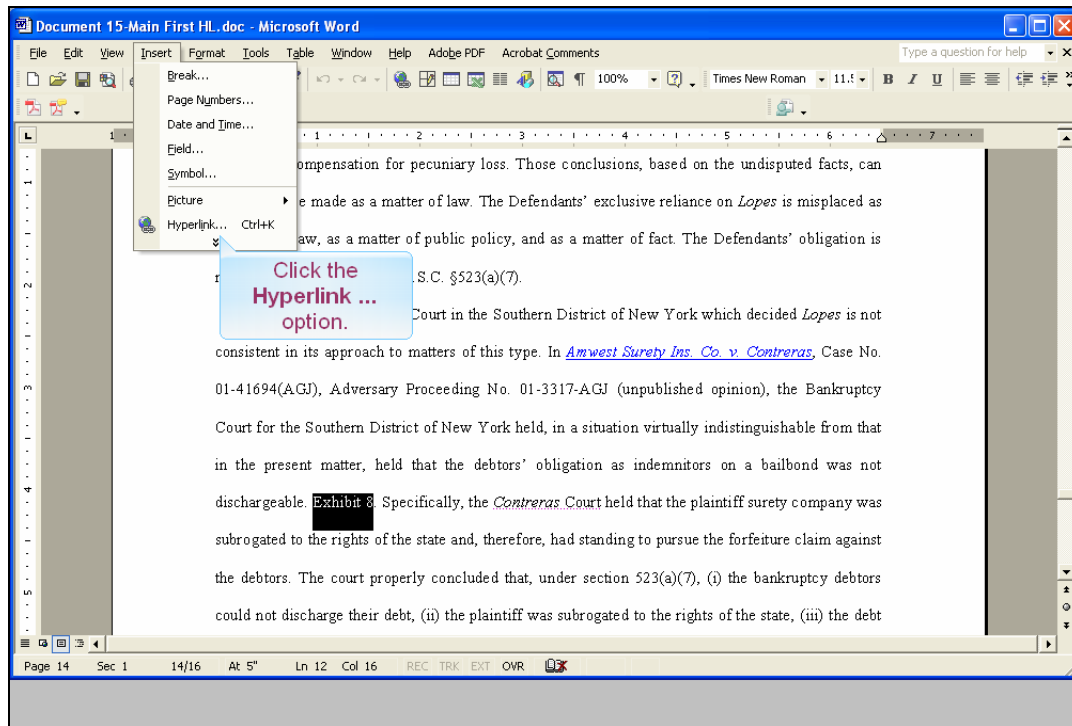
Slide 32
Slide notes: From the drop-down menu, select Hyperlink ...
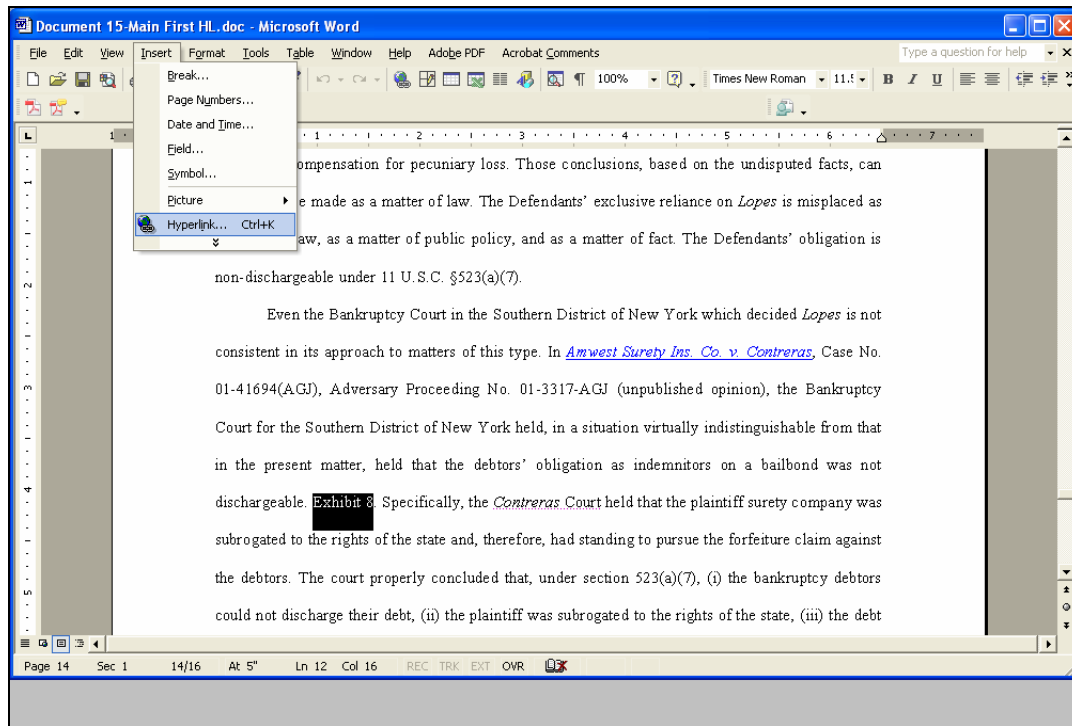
Slide 33
Slide notes: (Note: This is a transition slide.)
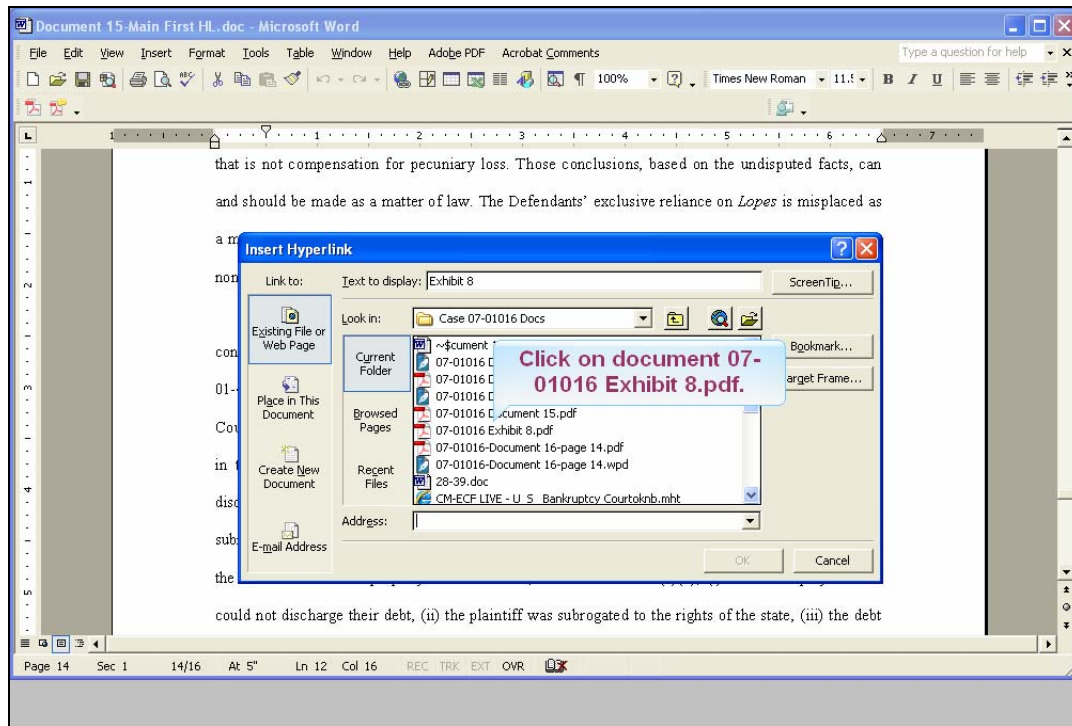
Slide 34

Slide notes: A Microsoft Word Insert Hyperlink dialog box opens. We have navigated to the correct folder on our "C" drive. The document we are creating a hyperlink to is named 07-01016 Exhibit 8.pdf. Click on that document.
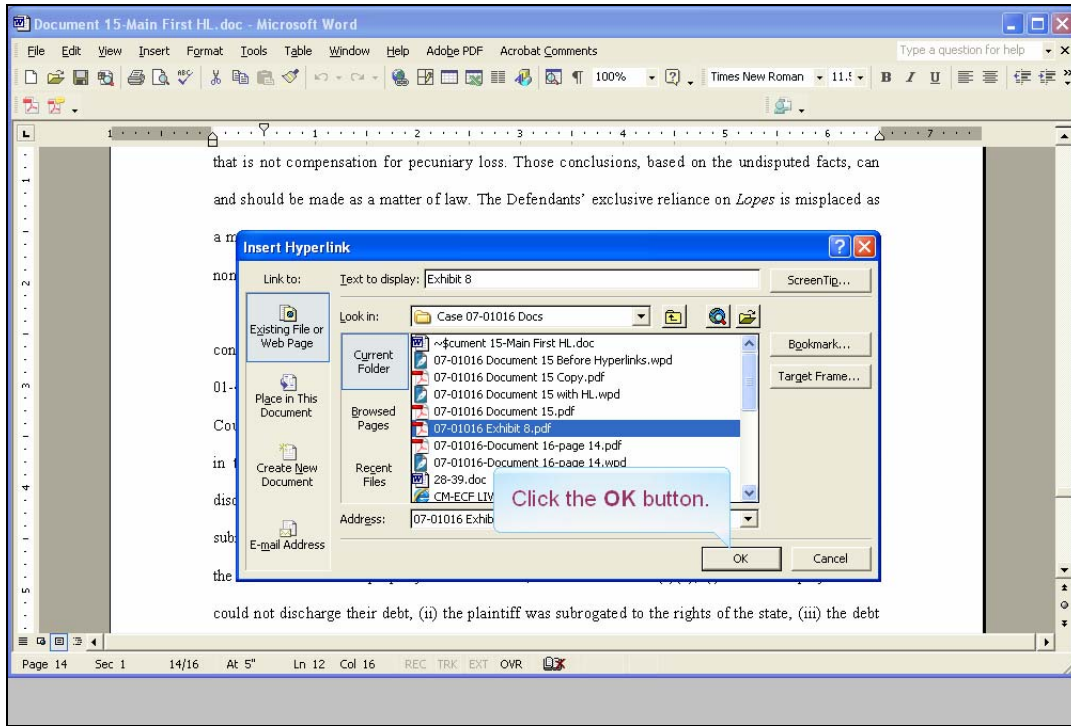
Slide 35
Slide notes: Word highlights the document. Click the OK button.
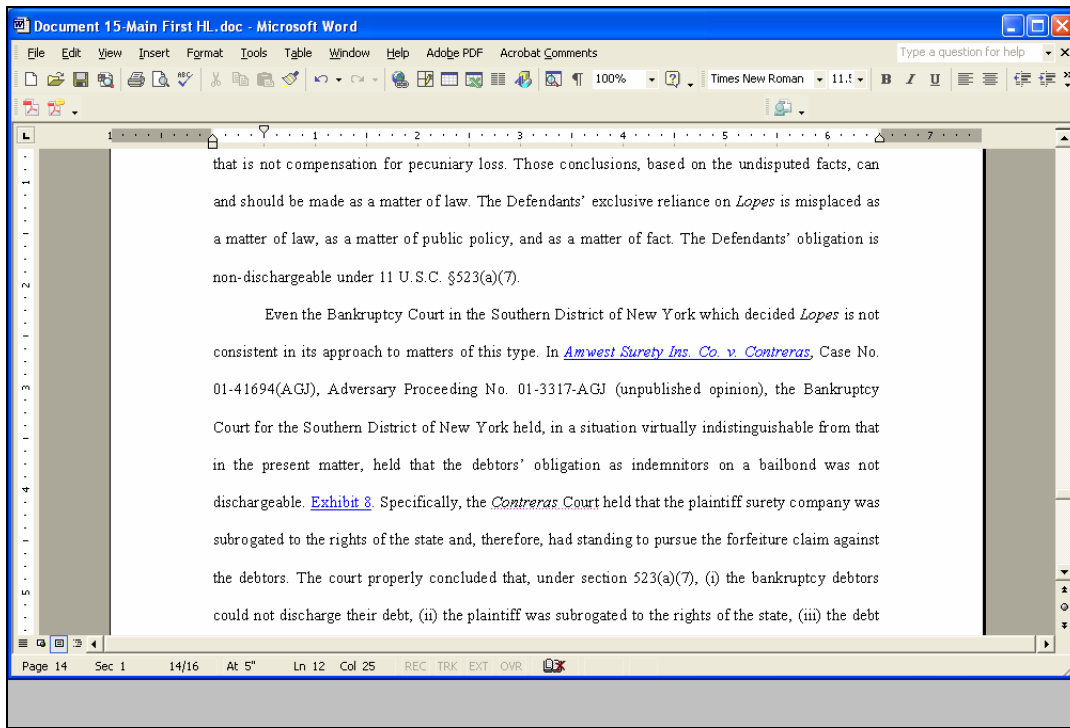
Slide 36

Slide notes: Word has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue. We are now ready to publish our Word document to PDF.

Publish to PDF

Publish to PDF

Slide notes: (Note: This is a transition slide.)
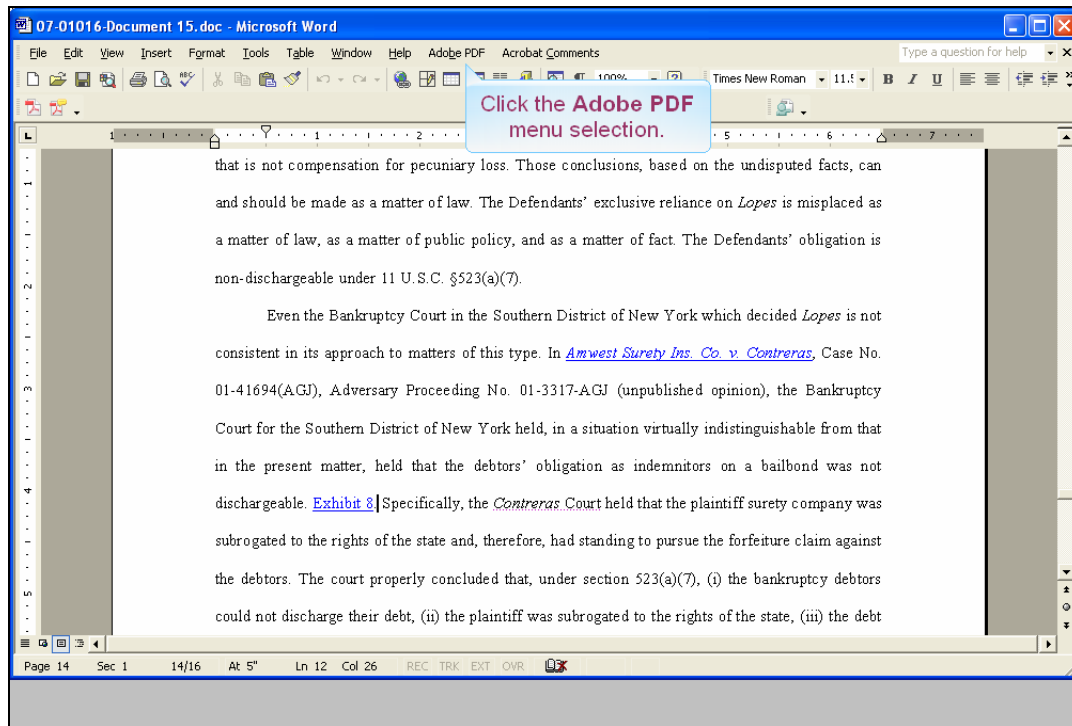
Slide 38

Slide notes: The next step is to publish our brief to PDF format so we can file it with the Appellate Court. When using Word, you may not have an "Adobe PDF" menu selection. If this is true, you must close the Word file and then use the Adobe Acrobat application to create the PDF document. Since we are using Microsoft Word 2002 we will use the Adobe PDF menu selection. Click on Adobe PDF.
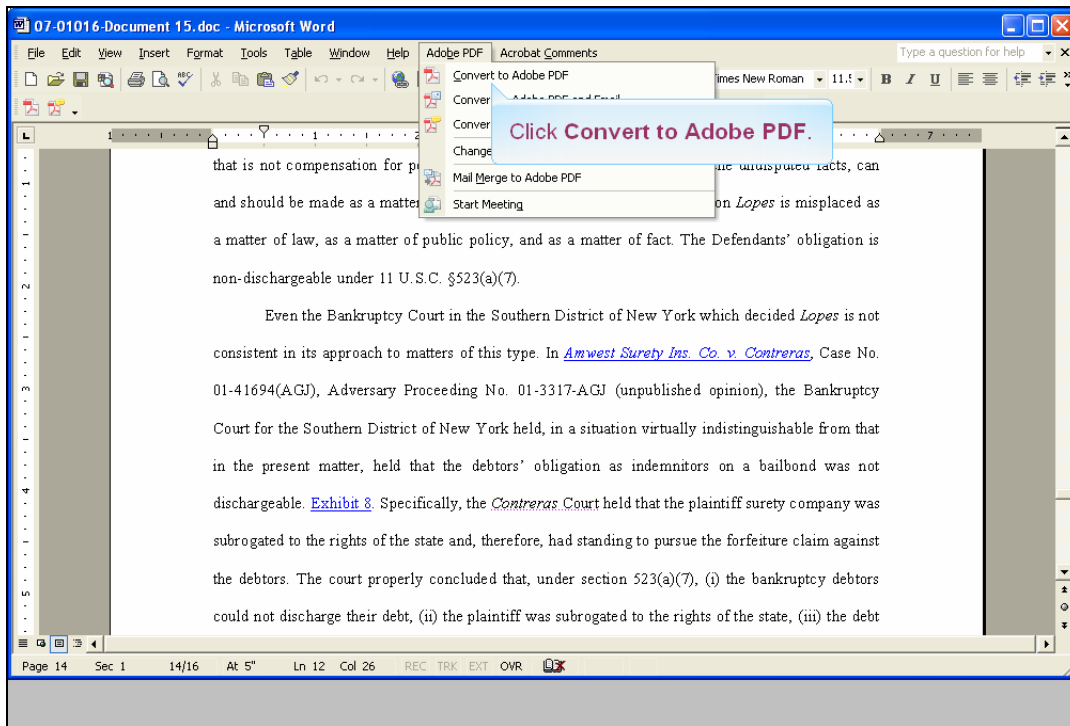
Slide 39
Slide notes: On the Adobe PDF drop-down menu, click on Convert to Adobe PDF.
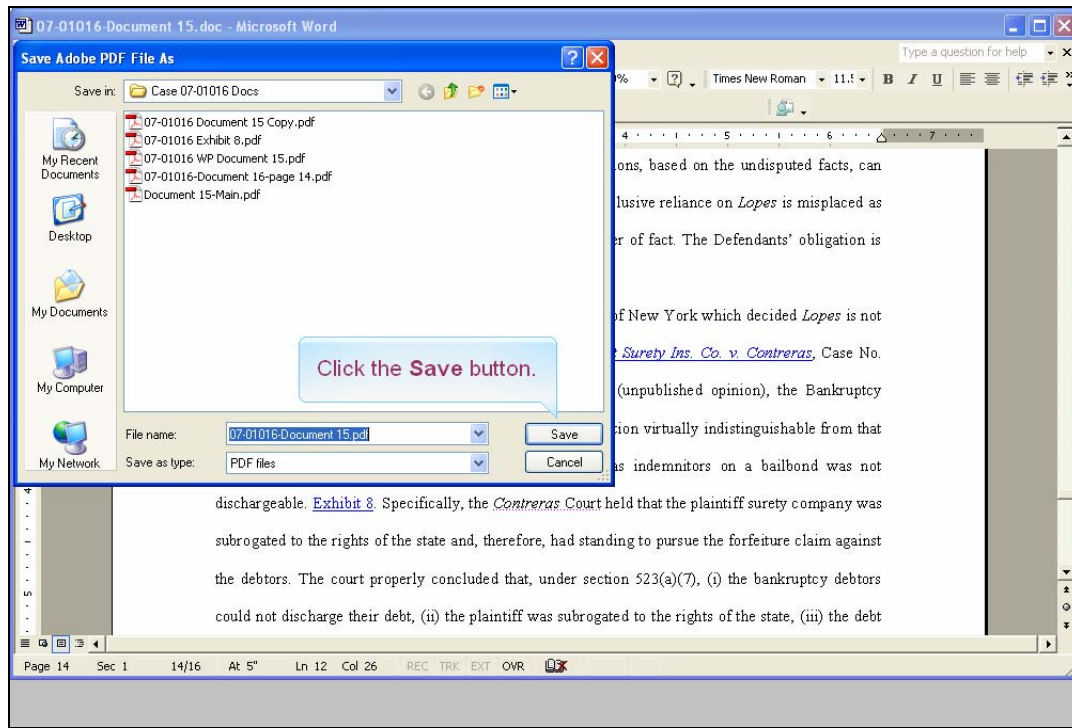
Slide 40
Slide notes: Word gives you the opportunity to re-name the PDF file. We will use the file name that is highlighted. Click on the Save button.
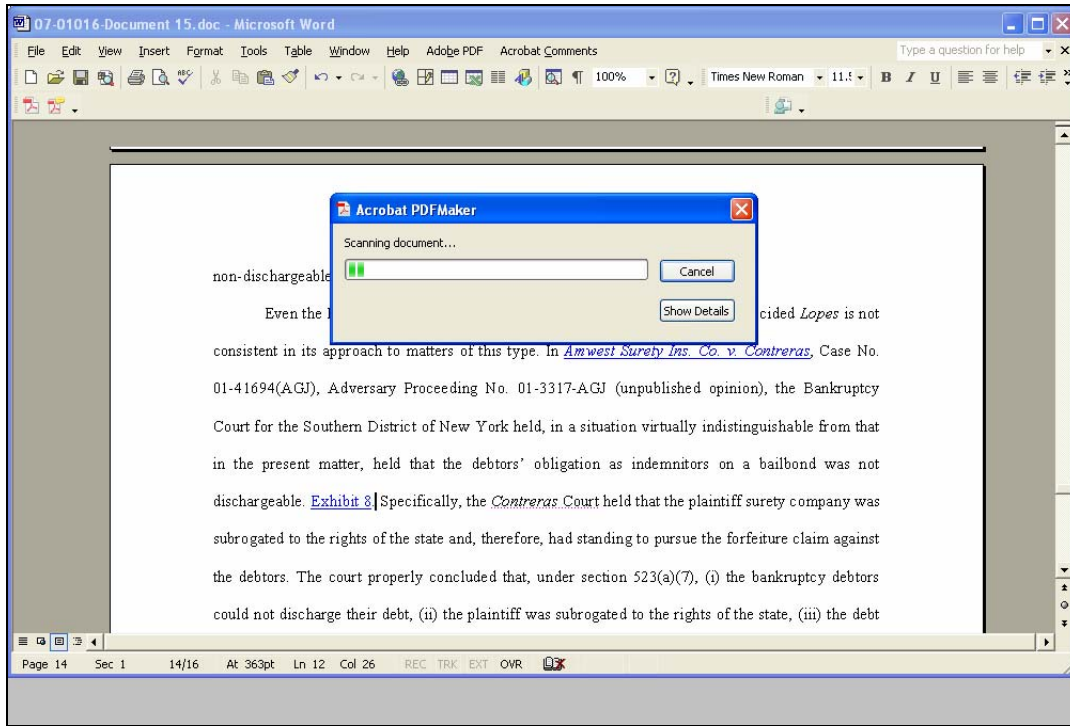
Slide 41
Slide notes: (Note: This is a transition slide.)

Slide 42
Slide notes: (Note: This is a transition slide.)

Slide 43
Slide notes: (Note: This is a transition slide.)
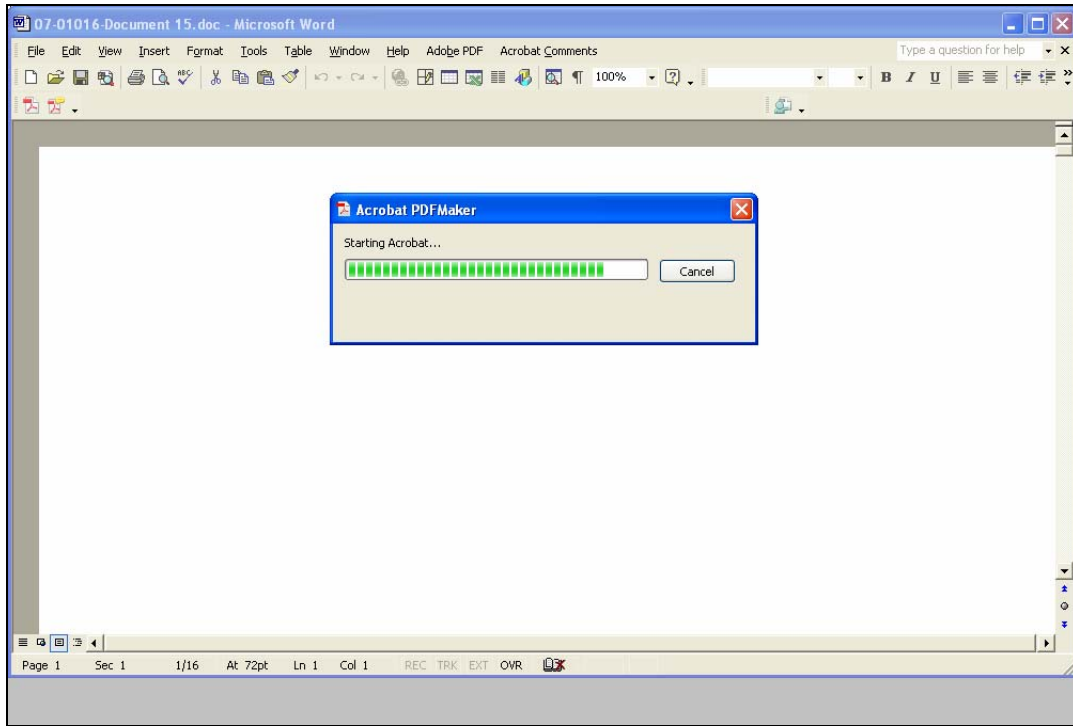
Slide 44
Slide notes: (Note: This is a transition slide.)
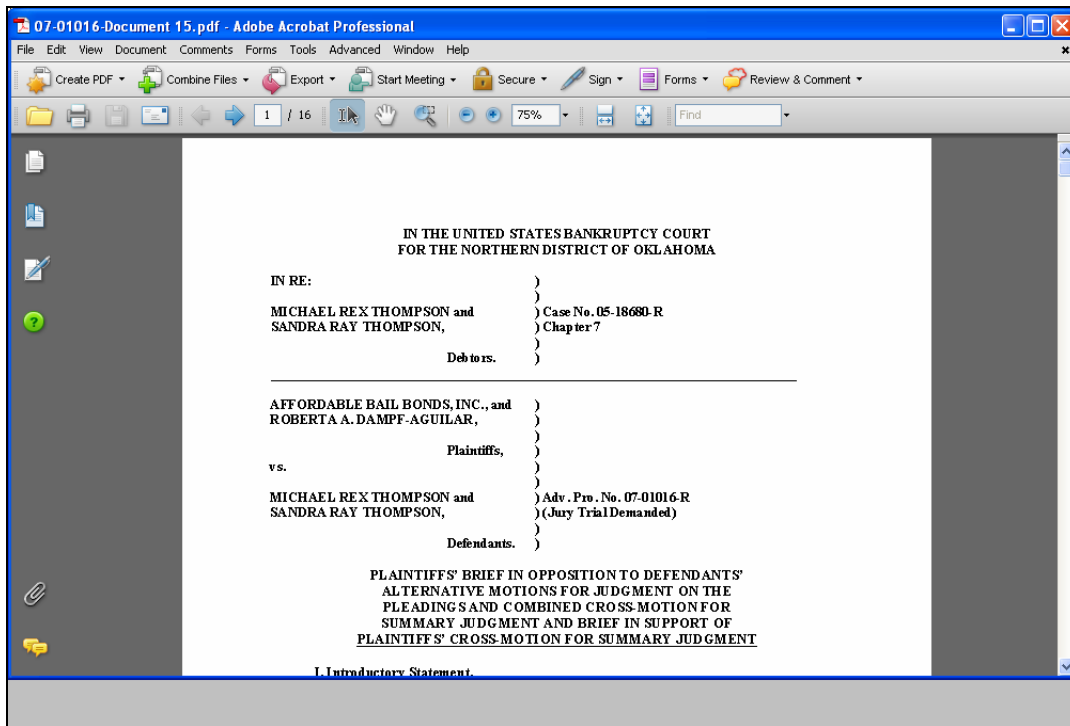
Slide 45

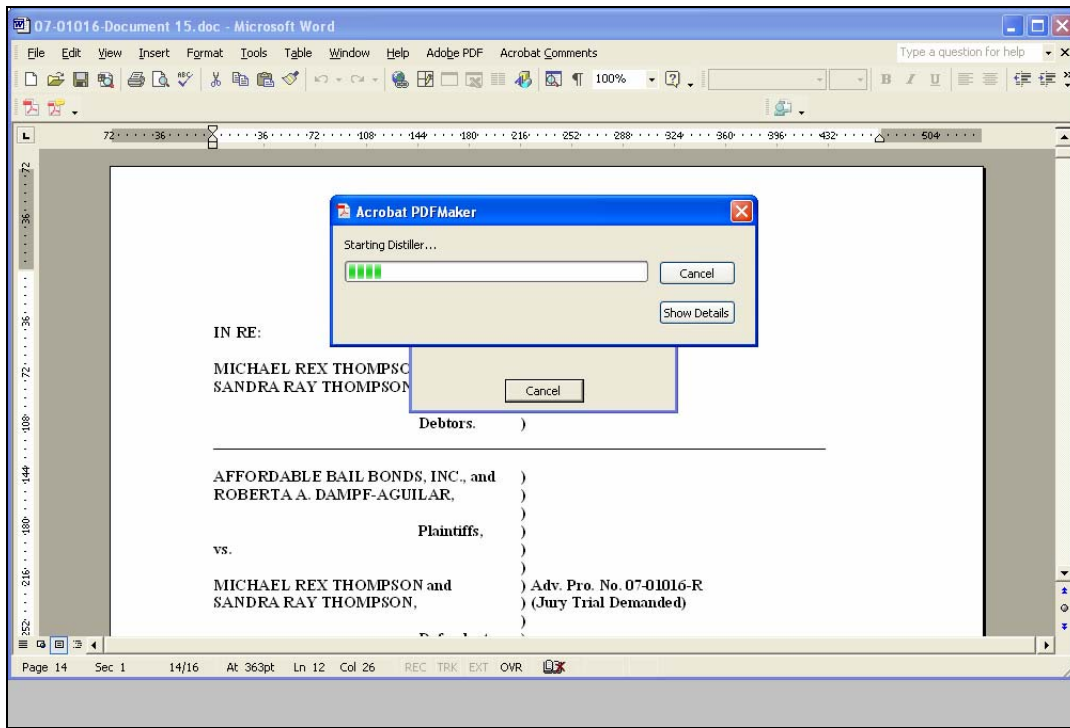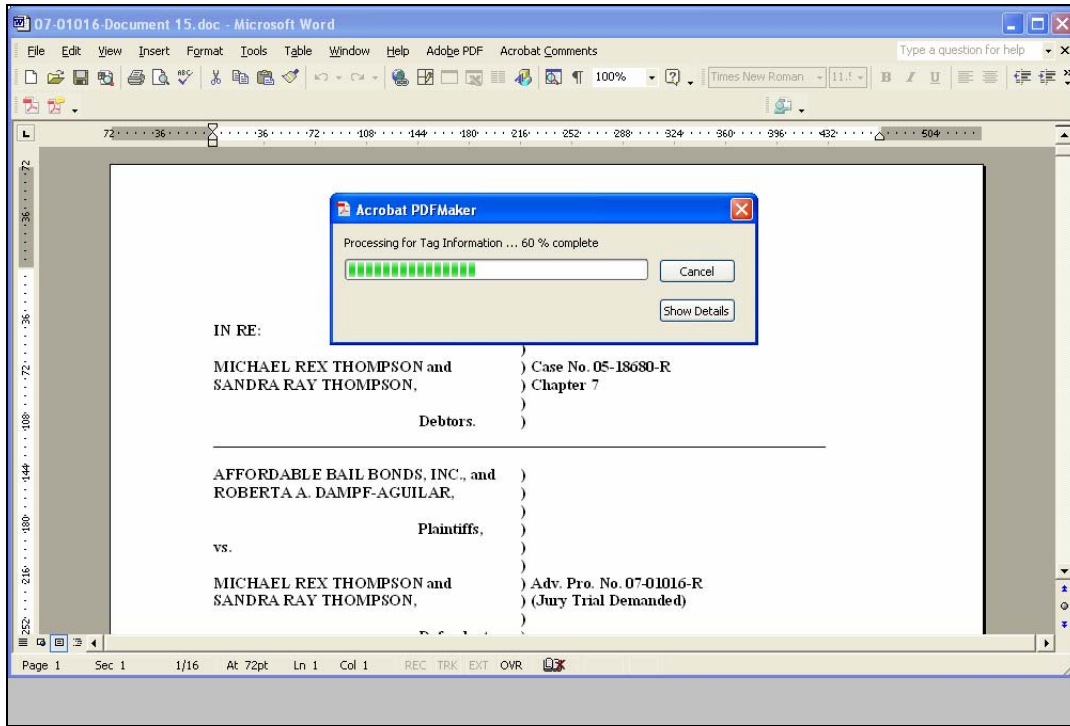Slide notes: The document has now been published, or converted, to PDF. It's ready to be filed with the court. But, it might be a good idea to check the hyperlinks in our PDF file to make sure they are linked to the correct documents. We'll do that next.
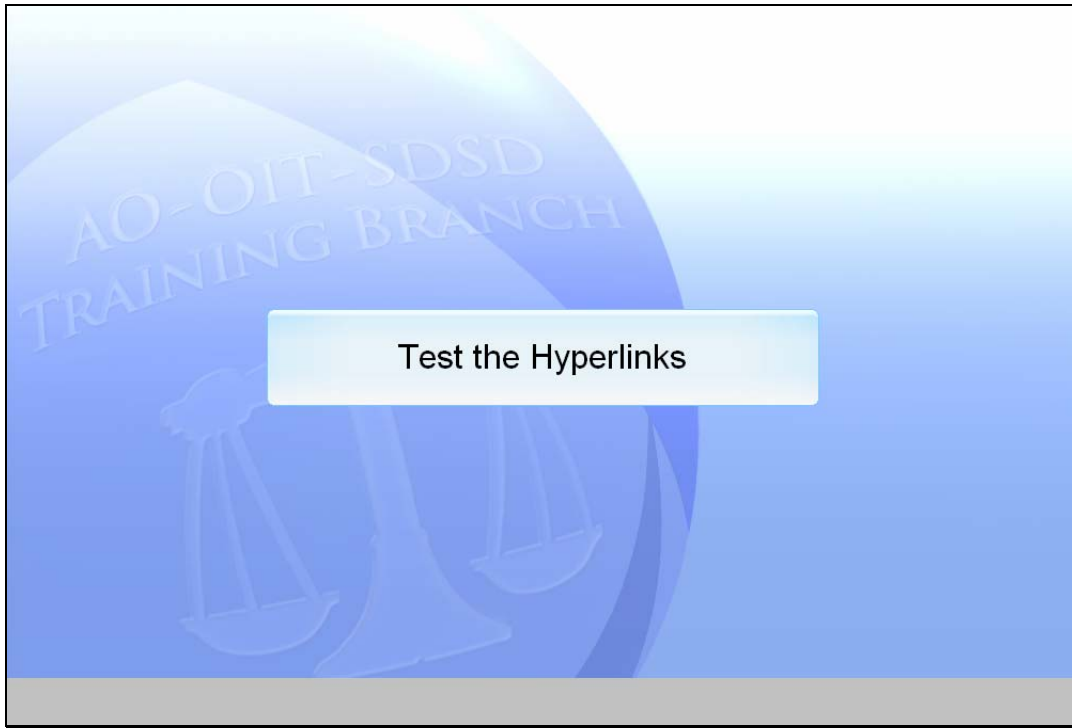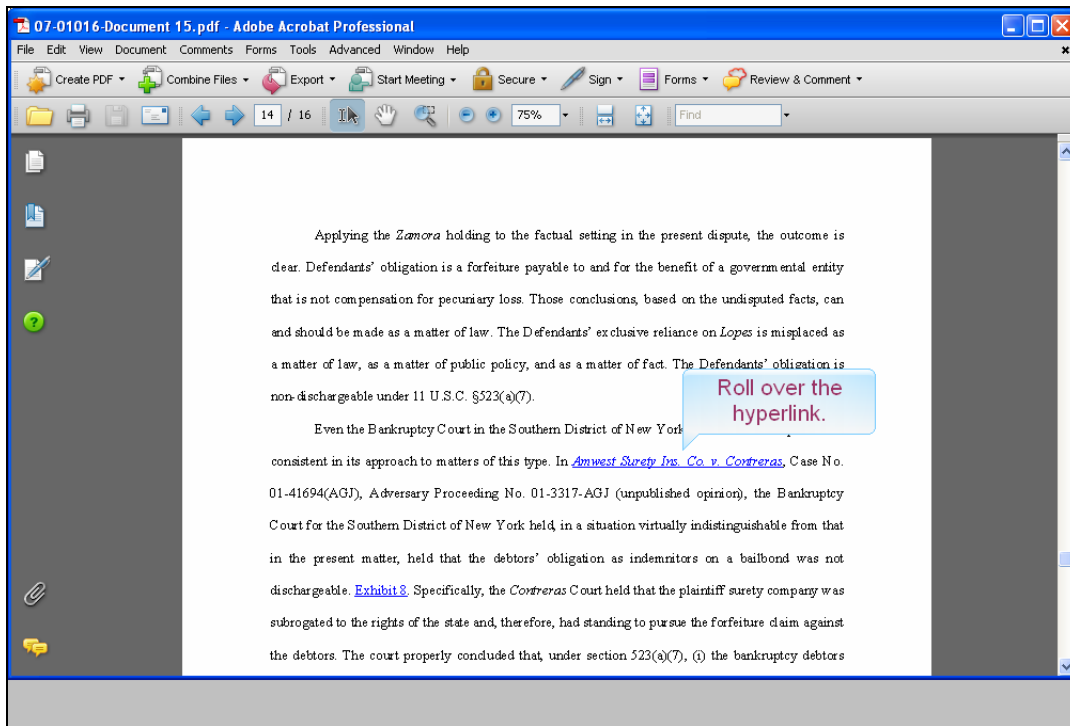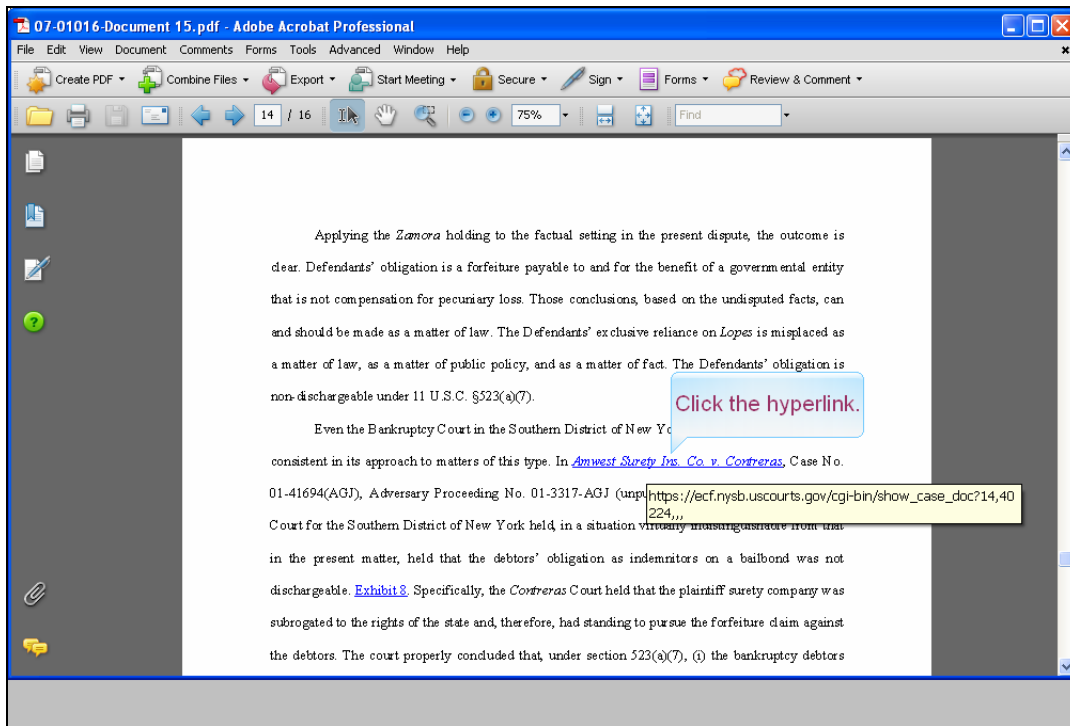
Test the Hyperlinks
Slide notes: (Note: This is a transition slide.)

Slide 47

Slide notes: We've now opened the PDF version of the brief and moved to the page that has our hyperlinks. We're going to test the hyperlinks to make sure they link to the correct
documents before we file the brief. Please note that a user may not have access in CM/ECF to the referenced documents if there are any CM/ECF access restrictions imposed. Also note that if the document cannot be found (e.g., the case or document has been deleted), a message will be displayed to that effect. If the server where the document is stored cannot be accessed (e.g., system is down, network issue), the standard 404 error message will be displayed. Move your mouse pointer to the first hyperlink.
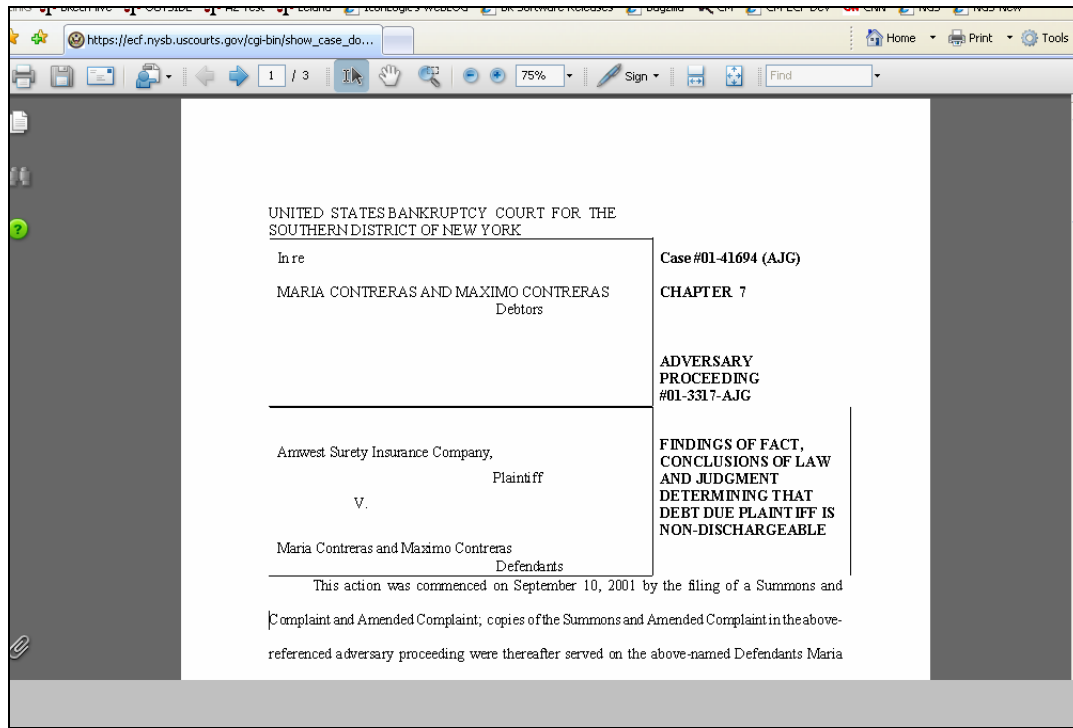
Slide 48

Slide notes: Notice that as we place the mouse over the hyperlink, the URL appears. Click the hyperlink.
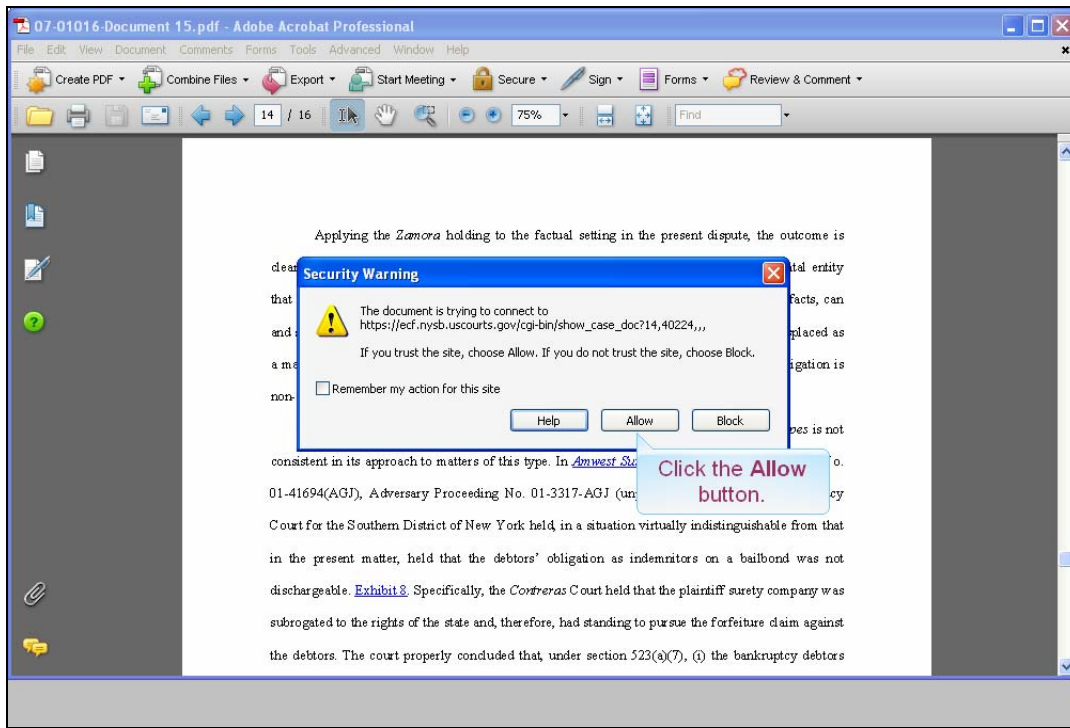
Slide 49

Slide notes: A Security Warning appears. Since we trust the Bankruptcy Court web site, click the Allow button.
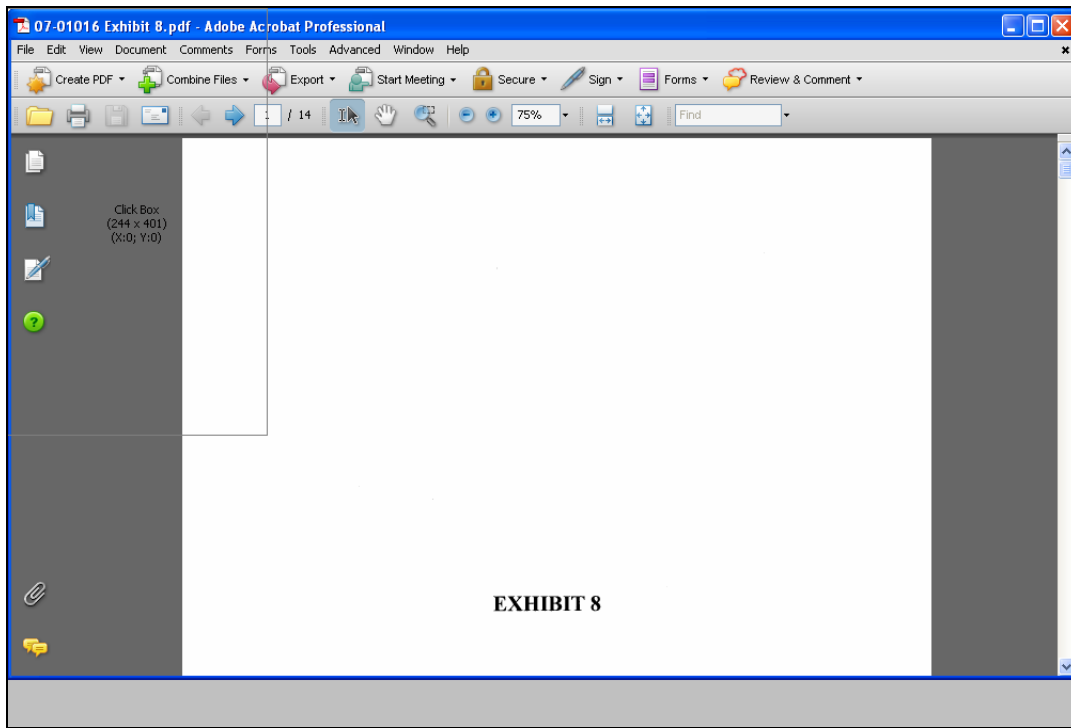
Slide 50

Slide notes: Having logged into PACER, the Findings of Fact, Conclusions of Law PDF document opens and we can verify that this is indeed the document we wish to reference in our brief.

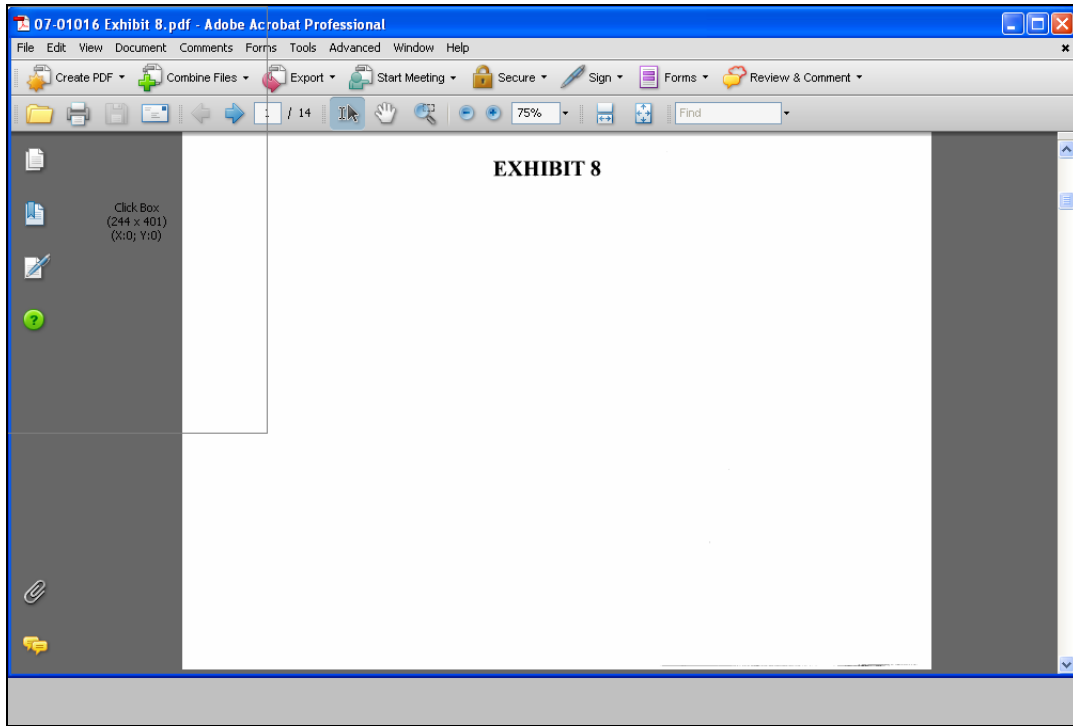Now, let's return to our brief and verify our second hyperlink.
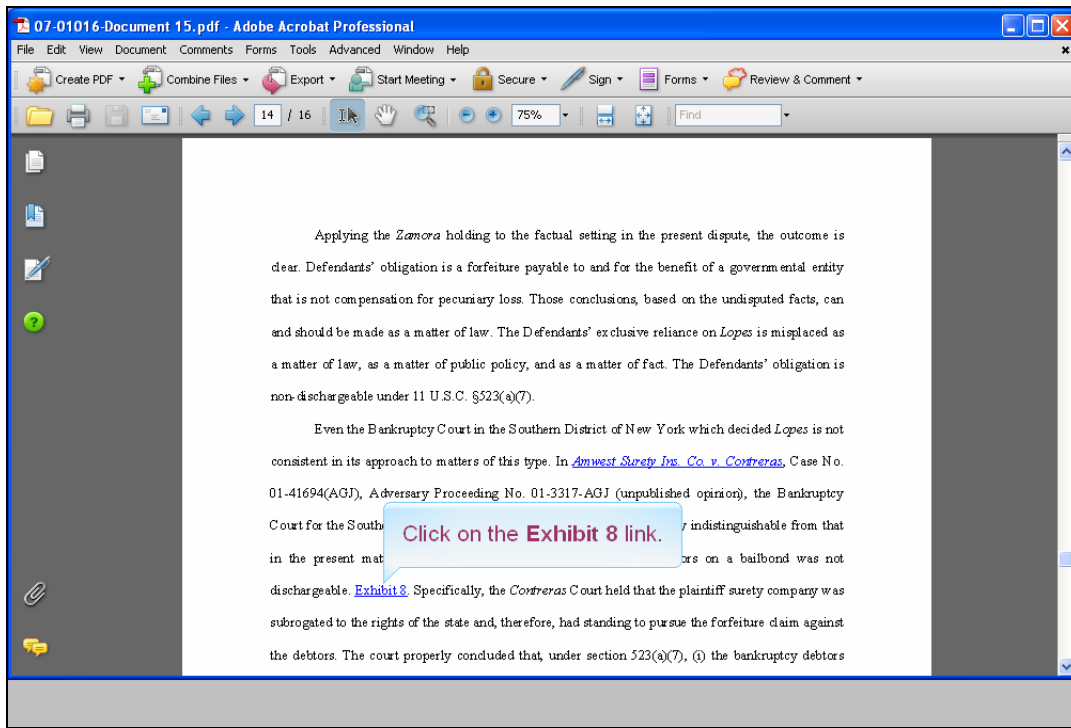
Slide 51

Slide notes: We have again opened the PDF version of the brief and moved to the page that has our hyperlinks. Click on the Exhibit 8 hyperlink.
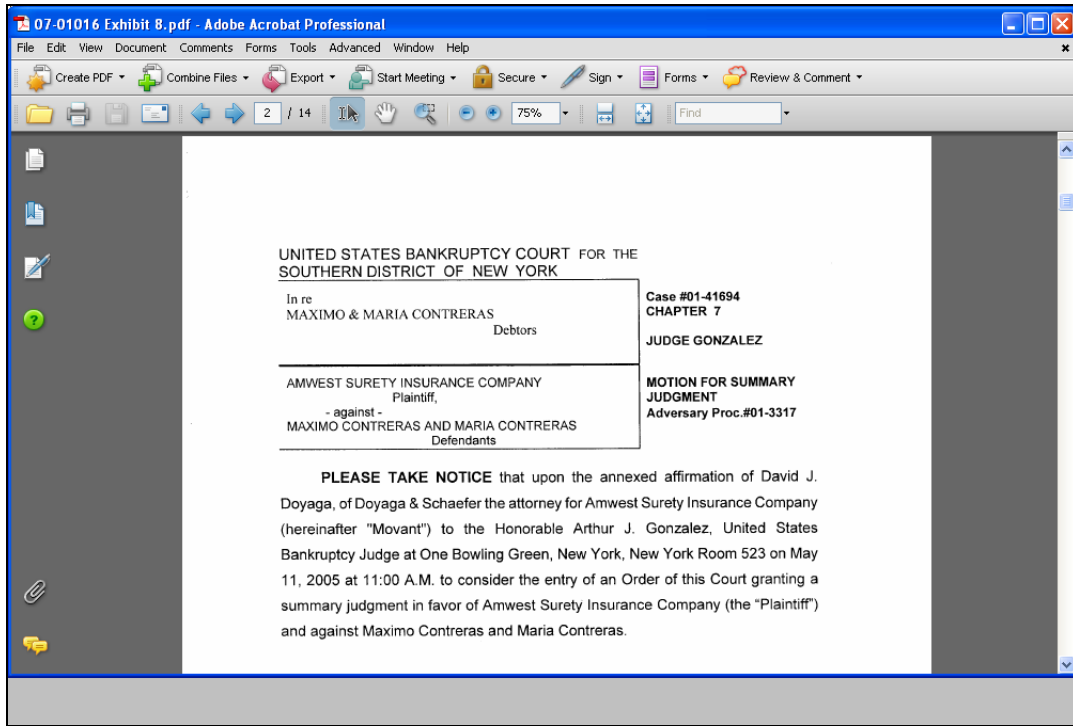
Slide 52

Slide notes: The first page of our Exhibit 8 document appears. Let's confirm that this is, in fact, the correct document. Press your Page Down key twice.
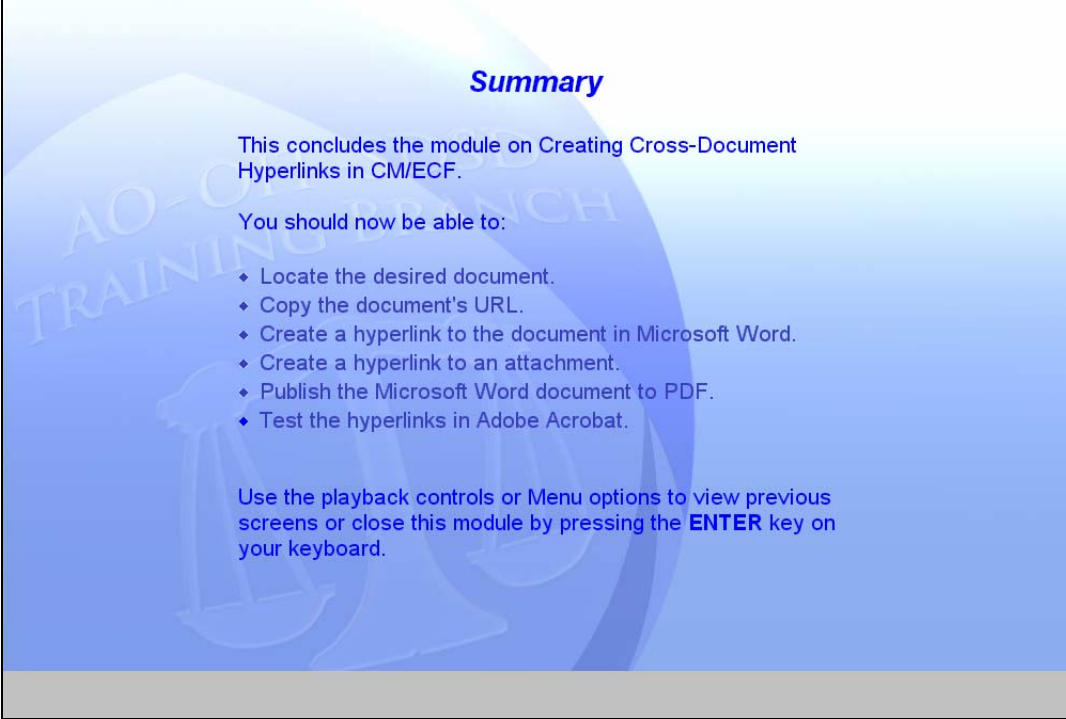
Slide 53
Slide notes:

Slide 54
Slide notes: We have now verified that this is our Motion for Summary Judgment, the document we wish to reference.

Summary

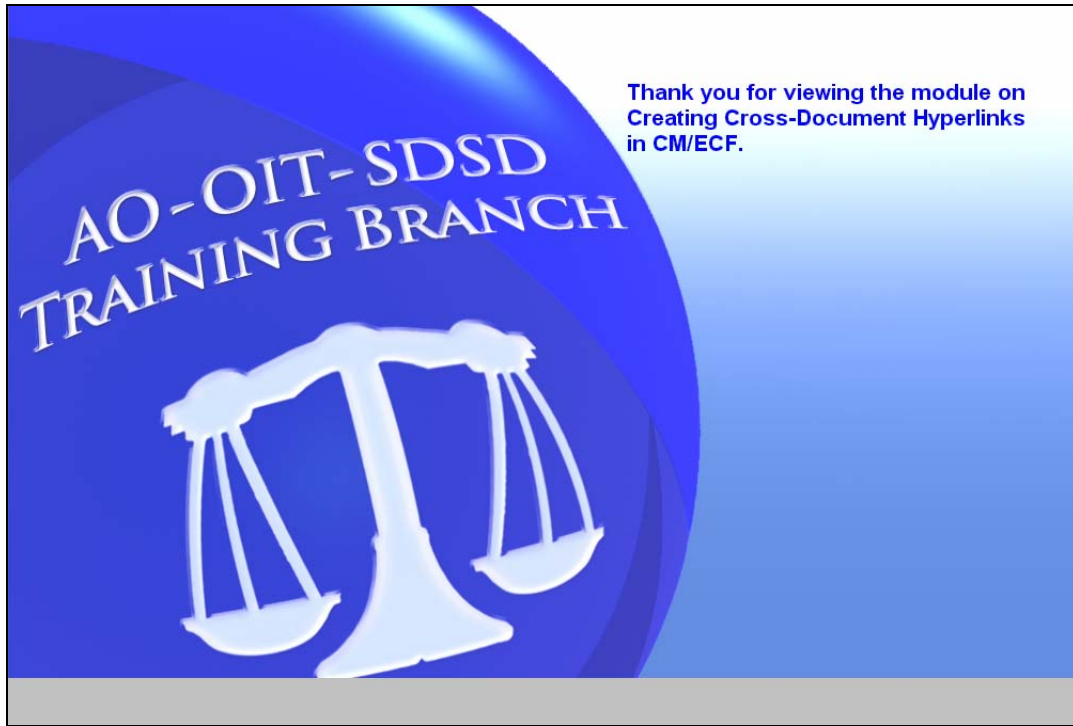Slide notes: This concludes the module on Creating Cross-Document Hyperlinks in CM/ECF using Microsoft Word.

Exit

Slide notes: Thank you for viewing the module on Creating Cross-Document Hyperlinks in CM/ECF.