

Welcome

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

Navigation Instructions: Each screen contains specific instructions to follow that mimic the actual software. Follow the instructions to progress through the lesson.

Playback Controls: Playback controls, located at the bottom of the screen, may be used to move forward or back, or to rewind to the beginning of the lesson. The playback controls also include a pause/play button toggle. If you pause the lesson, click the button again to resume.

Menu: Move the mouse over the word **MENU**, located in the upper left corner, to view the drop-down list of lesson topics. Click on the desired topic to jump to that part of the lesson.


Closed Captioning: Click the **CC** button in the playback controls to toggle the closed captioning feature on or off.

Audio: Click the **speaker icon** to toggle audio on or off.

Additional Information: Roll the mouse over the **"i"** located in the title bar to view module version and AO-OIT-SDSD-Training Branch contact information.

Exit the Lesson: To exit the lesson, click the **X** in the upper right corner of the lesson window, or select **Exit** from the menu.

Begin the Lesson: Click the **START** button when you are ready to begin.



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.

Overview and Objectives

In this module, we will simulate creating two hyperlinks in one case.

After completing this module you will be able to:

- ◆ Locate the desired document.
- ◆ Copy the document's URL.
- ◆ Create a hyperlink to the document in Microsoft Word.
- ◆ Create a hyperlink to an attachment.
- ◆ Publish the Microsoft Word document to PDF.
- ◆ Test the hyperlinks in Adobe Acrobat.

Click **CONTINUE**.

Click Box
CONTINUE
(A:100) (1:00/7)

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.

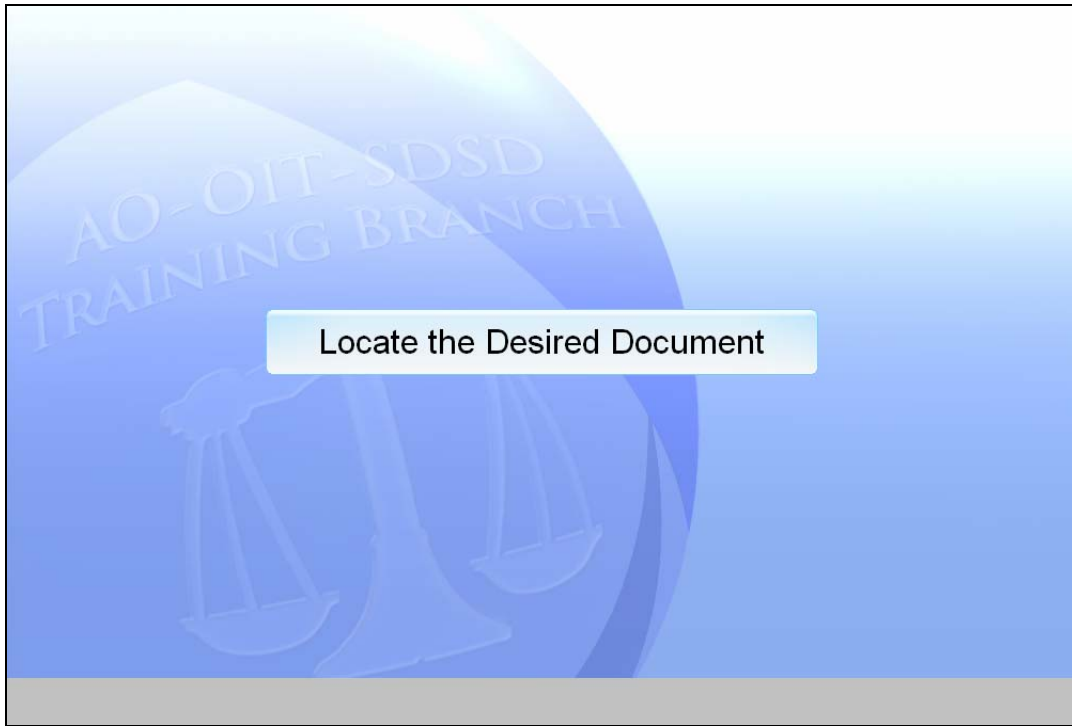
A CM/ECF case in another bankruptcy, district or appellate court.

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

An external link to another bankruptcy case in another court.

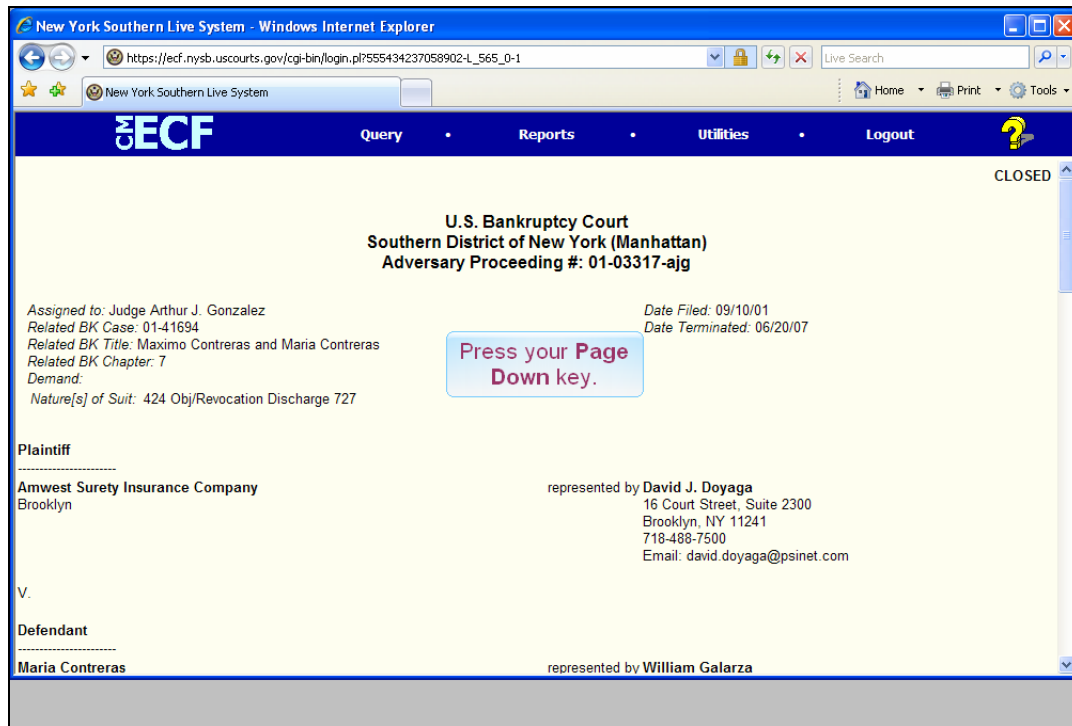
An internal link to an attachment to the document you are filing.

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.

ECF Query Reports Utilities Logout

Defendant

Maria Contreras
SSN: xxx-xx-4961

represented by **William Galarza**
857 Concourse Village West
Bronx, NY 10451
(718) 585-3600
LEAD ATTORNEY

Maximo Contreras

represented by **William Galarza**
(See above for address)
LEAD ATTORNEY

Filing Date	#	Document Text
09/10/2001	1	Complaint against Maria Contreras, Maximo Contreras Filed by David J. Doyaga, David J. Doyaga on behalf of American Surety Insurance Co.. (Doyaga, David) (Entered: 09/10/2001)
09/10/2001	2	[ENTERED IN ERROR] Summons and Notice of Pre-Trial Conference against Maria Contreras Answer Due: 10/15/2001; Maximo Contreras Answer Due: 10/15/2001. (related document(s)1) Filed by David J. Doyaga on behalf of American Surety Insurance Co.. with Pre-Trial Conference set for 10/30/2001 at 09:30 AM at Courtroom 523 (AJG), (Doyaga, David) Modified on 10/3/2001 (Bush, Brent). (Entered: 09/10/2001)
09/18/2001		Judge Arthur J. Gonzalez added to the case. (Massiah, Jennifer). (Entered: 09/18/2001)
09/20/2001		Receipt of Adversary Proceeding Filing Fee . Fee Amount \$ 150 , Receipt Number 121487. (Lee, Lisa) (Entered: 09/20/2001)

Press your Page Down key.

Slide 7

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

Date	Document Description
09/20/2001	Receipt of Adversary Proceeding Filing Fee . Fee Amount \$ 150 , Receipt Number 121487. (Lee, Lisa) (Entered: 09/20/2001)
10/03/2001	3 Amended Complaint against Maria Contreras, Maximo Contreras Filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 10/03/2001)
10/05/2001	4 Summons and Notice of Pre-Trial Conference against Maria Contreras Answer Due: 11/6/2001; Maximo Contreras Answer Due: 11/6/2001. Filed by Clerk's Office, U.S. Bankruptcy Court, with Pre-Trial Conference set for 11/20/2001 at 09:30 AM at Courtroom 523 (AJG), (Glover, Tara) (Entered: 10/05/2001)
10/09/2001	5 Affidavit of Service (related document 3) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 10/09/2001)
11/16/2001	6 Answer to Amended Complaint (Related Doc # 3) filed by Maria Contreras, Maximo Contreras. (Suarez, Aurea) (Entered: 12/05/2001)
04/13/2005	7 Motion for Summary Judgment and Plaintiff's Memorandum of Law In Support of Motion for Summary Judgment filed by David J. Doyaga on behalf of Amwest Surety Insurance Company, with hearing to be held on 5/11/2005 at 11:00 AM at Courtroom 523 (AJG) (Attachments: # 1 Plaintiff's Memorandum of Law In Support of Motion for Summary Judgment) (Doyaga, David) (Entered: 04/13/2005)
04/13/2005	8 Statement of Undisputed Fact (related document(s) 7) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 04/13/2005)
04/14/2005	9 Affidavit of Service of Motion for Summary Judgment, Memorandum of Law in Support, and Statement of Facts (related document(s) 8 , 7) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 04/14/2005)

Slide 8

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

New York Southern Live System - Windows Internet Explorer		
https://ecf.nysb.uscourts.gov/cgi-bin/login.pl?767590356011478-L_565_0-1		
New York Southern Live System		
ECF Query Reports Utilities Logout		
04/14/2005	9	Affidavit of Service of Motion for Summary Judgment, Memorandum of Law in Support, and Statement of Facts (related document(s) 8 , 7) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 04/14/2005)
04/18/2005	10	Letter Exhibits A-C related to documents#7 and 8 filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Attachments: # 1 Exhibit B# 2 Exhibit C)(Doyaga, David) (Entered: 04/18/2005)
05/10/2005	11	Response To (related document(s) 7) filed by William Galarza on behalf of Maria Contreras, Maximo Contreras. (Suarez, Aurea) (Entered: 05/24/2005)
03/13/2006	12	Transcript of Hearing held on February 8, 2006, Re: Motion filed by Regency Reporting, Inc.. (Braithwaite, Kenishia) (Entered: 03/15/2006)
06/23/2006	13	Notice of Settlement of an Order filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. with hearing to be held on 7/31/2006 at 10:00 AM at Courtroom 523 (AJG) (Attachments: # 1 Exhibit)(Doyaga, David) (Entered: 06/23/2006)
07/31/2006	14	Findings of Fact, Conclusions of Law and Judgment Determining that debt due plaintiff is non-dischargeable (related document(s) 13). (DePierola, Jacqueline) (Entered: 07/31/2006)
07/31/2006	15	Affidavit of Service (related document(s) 14) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 07/31/2006)
06/20/2007		Adversary Case 01-3317 Closed. This Adversary Proceeding Docket is Closed Subject to the Filing of a Notice of Appeal within Ten (10) Days of the Entry of the Order Terminating this Adversary Proceeding. (Suarez, Aurea) (Entered: 06/20/2007)

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.)



The screenshot shows a Windows Internet Explorer browser window displaying the ECF (Electronic Case Filing) system. The address bar shows the URL: https://ecf.nysb.uscourts.gov/cgi-bin/login.pl?767590356011478-L_565_0-1. The page features a navigation menu with 'Query', 'Reports', 'Utilities', and 'Logout'. Below the menu is a table listing various legal documents with their dates, document numbers, and descriptions.

Date	Document Number	Description
04/14/2005	9	Affidavit of Service of Motion for Summary Judgment, Memorandum of Law in Support, and Statement of Facts (related document(s) 8 , 7) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 04/14/2005)
04/18/2005	10	Letter Exhibits A-C related to documents#7 and 8 filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Attachments: # 1 Exhibit B# 2 Exhibit C)(Doyaga, David) (Entered: 04/18/2005)
05/10/2005	11	Response To (related document(s) 7) filed by William Galarza on behalf of Maria Contreras, Maximo Contreras. (Suarez, Aurea) (Entered: 05/24/2005)
03/13/2006	12	Transcript of Hearing held on February 8, 2006, Re: Motion filed by Regency Reporting, Inc.. (Braithwaite, Kenishia) (Entered: 03/15/2006)
06/23/2006	13	Notice of Settlement of an Order filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. with hearing to be held on 7/31/2006 at 10:00 AM at Courtroom 523 (AJG) (Attachments: # 1 Exhibit)(Doyaga, David) (Entered: 06/23/2006)
07/31/2006	14	Findings of Fact, Conclusions of Law and Judgment Determining that debt due plaintiff is non-dischargeable (related document(s) 13). (DePierola, Jacqueline) (Entered: 07/31/2006)
07/31/2006	15	Affidavit of Service (related document(s) 14) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 07/31/2006)
06/20/2007		Adversary Case 01-3317 Closed. This Adversary Proceeding Docket is Closed Subject to the Filing of a Notice of Appeal within Ten (10) Days of the Entry of the Order Terminating this Adversary Proceeding. (Suarez, Aurea) (Entered: 06/20/2007)

Slide 11

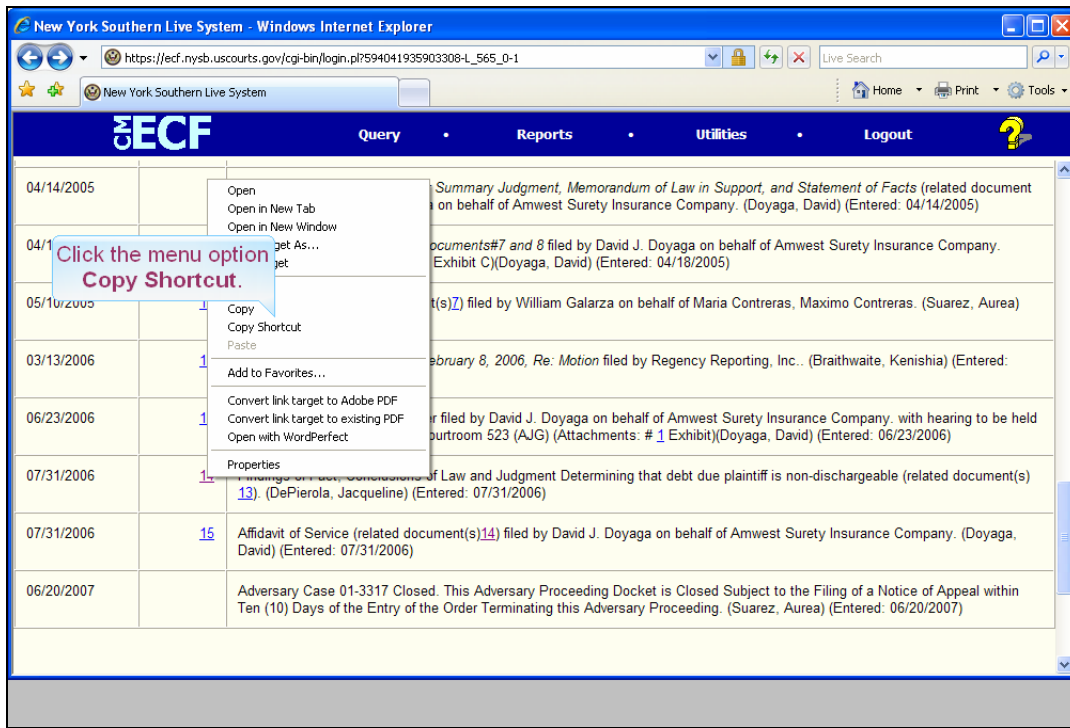
Slide notes: In order to copy the URL, we need to Right-Click on the document number. This right-click will cause the browser to pop up a menu that contains a choice to copy the URL.

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

The screenshot shows a web browser window titled "New York Southern Live System - Windows Internet Explorer". The address bar contains the URL "https://ecf.nysb.uscourts.gov/cgi-bin/login.pl?S94041935903308-L_565_0-1". The page header includes the ECF logo and navigation links: Query, Reports, Utilities, and Logout. The main content is a table with columns for date, document number, and description. A callout box with a blue border and white background points to document 14, containing the text "Right Click document number 14.".

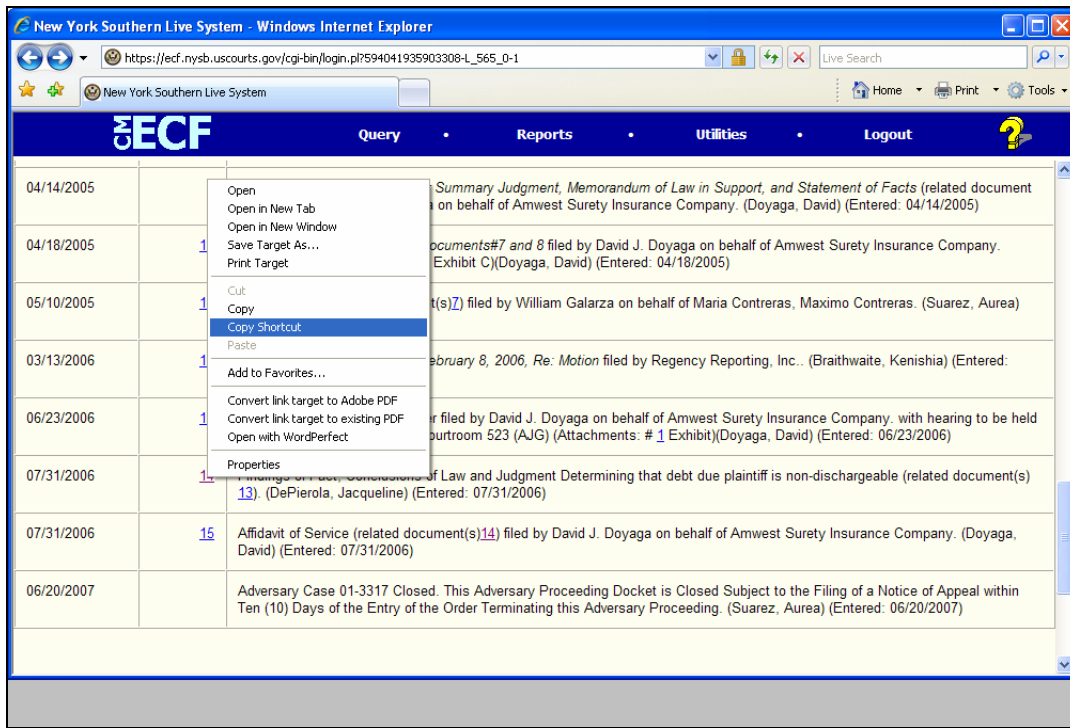
Date	Document Number	Description
04/14/2005	9	Affidavit of Service of Motion for Summary Judgment, Memorandum of Law in Support, and Statement of Facts (related document(s) 8 , 7) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 04/14/2005)
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05/10/2005	11	Response To (related document(s) 7) filed by William Galarza on behalf of Maria Contreras, Maximo Contreras. (Suarez, Aurea) (Entered: 05/24/2005)
03/13/2006	12	Transcript of Hearing held on February 8, 2006, Re: Motion filed by Regency Reporting, Inc.. (Braithwaite, Kenishia) (Entered: 03/15/2006)
06/23/2006	13	Notice of Settlement of an Order filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. with hearing to be held on 7/31/2006 at 10:00 AM at Courtroom 523 (AJG) (Attachments: # 1 Exhibit)(Doyaga, David) (Entered: 06/23/2006)
07/31/2006	14	Findings of Fact, Conclusions of Law and Judgment Determining that debt due plaintiff is non-dischargeable (related document(s) 13). (DePierola, Jacqueline) (Entered: 07/31/2006)
07/31/2006	14	Findings of Fact, Conclusions of Law and Judgment Determining that debt due plaintiff is non-dischargeable (related document(s) 14) filed by David J. Doyaga on behalf of Amwest Surety Insurance Company. (Doyaga, David) (Entered: 07/31/2006)
06/20/2007		Adversary Case 01-3317 Closed. This Adversary Proceeding Docket is Closed Subject to the Filing of a Notice of Appeal within Ten (10) Days of the Entry of the Order Terminating this Adversary Proceeding. (Suarez, Aurea) (Entered: 06/20/2007)

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 number 14 to its clipboard. Click that option.



Slide 14

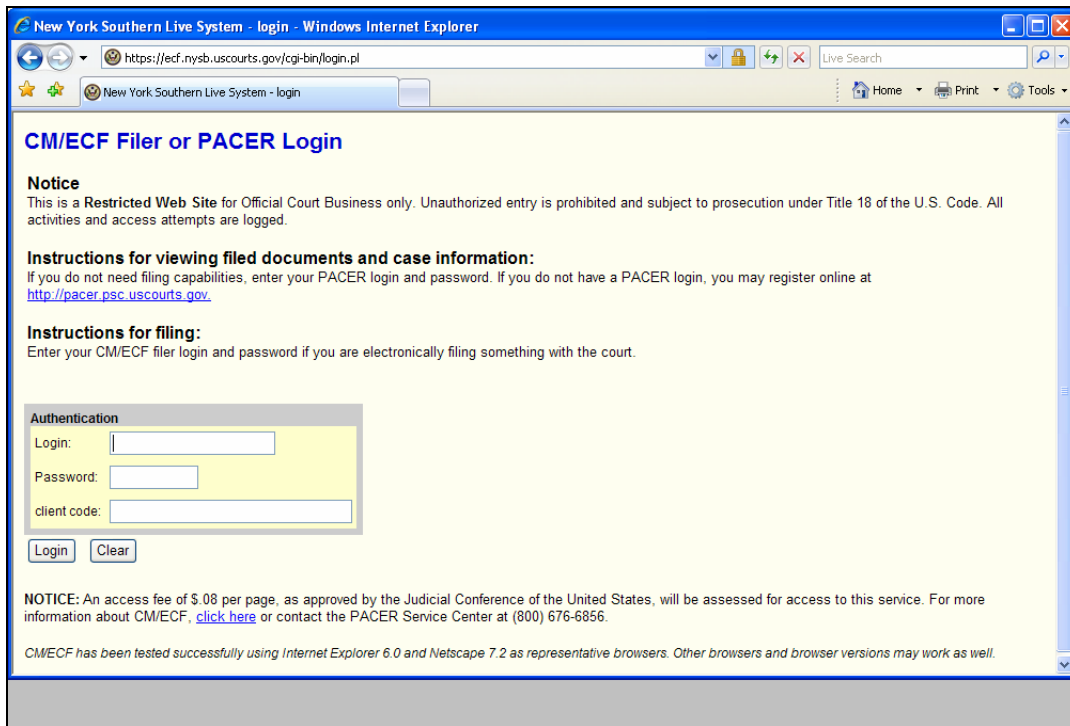
Slide notes: (Note: This is a transition slide.)



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.



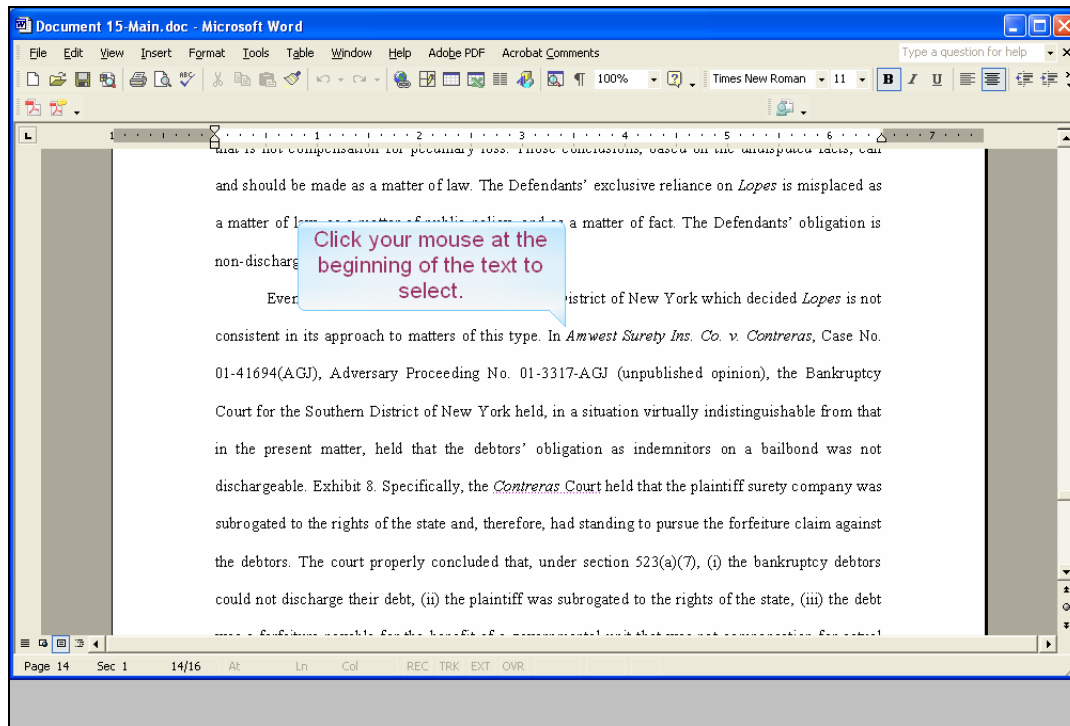
Slide 16

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



Create the Hyperlink

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

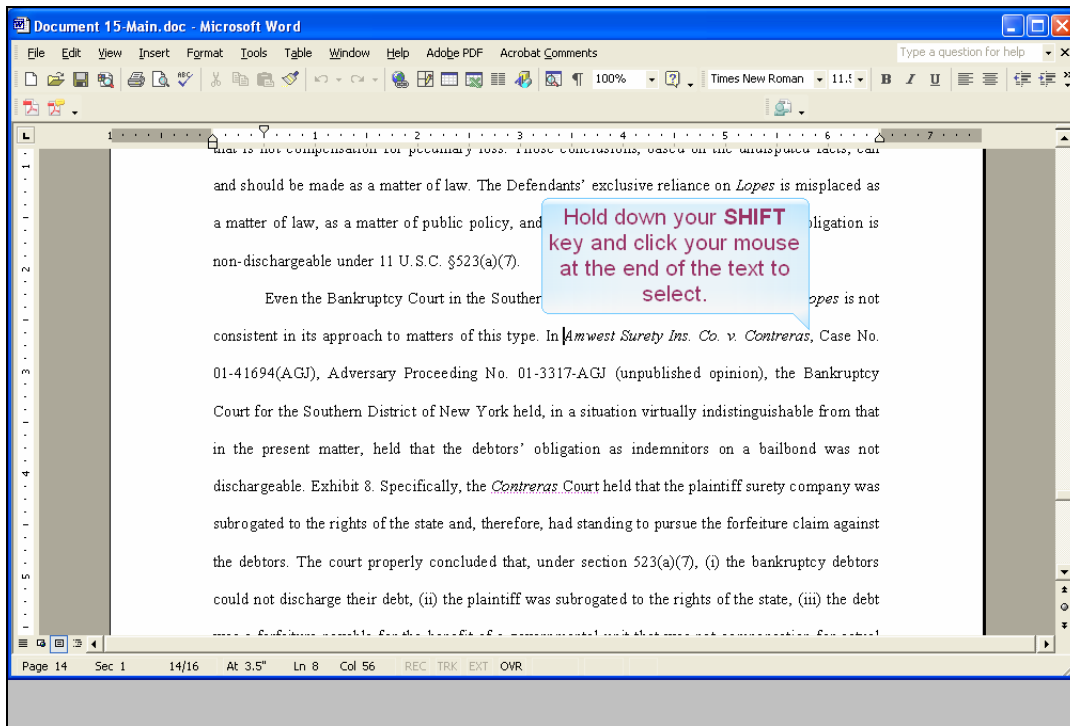


Slide 18

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

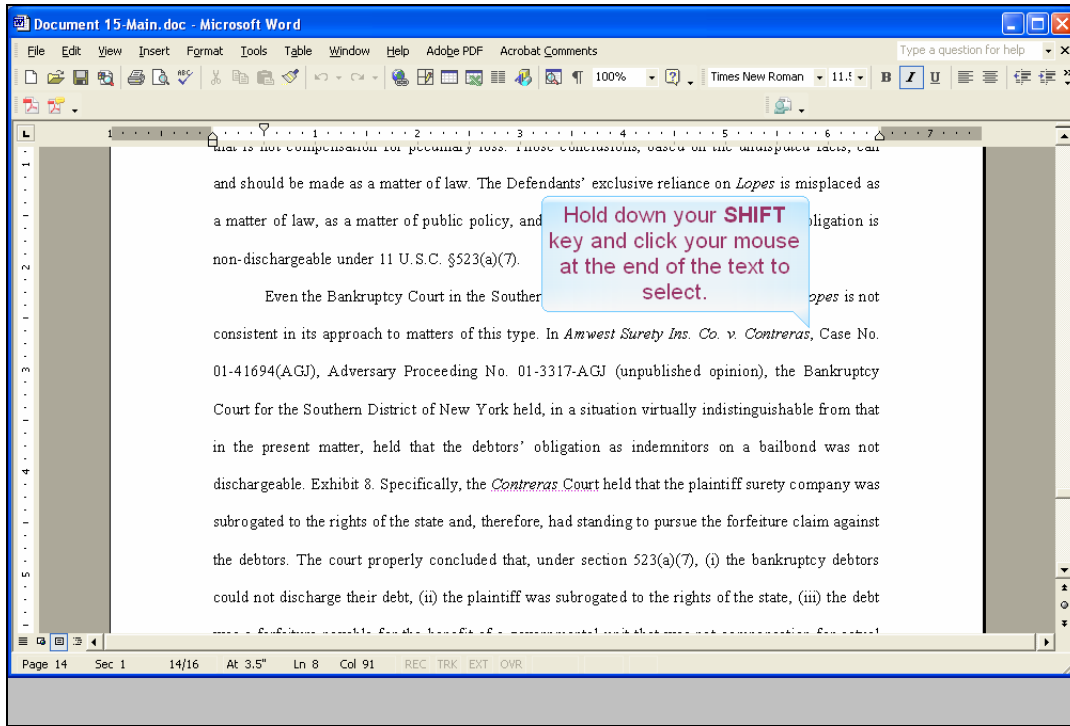
In the text of our brief, we refer to *Amwest Surety Ins. Co. v. Contreras* from the Bankruptcy Court in the Southern District of New York. In order to make this text into a hyperlink to the actual document, we must first select the text that will become the hyperlink. There are several ways to select 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.

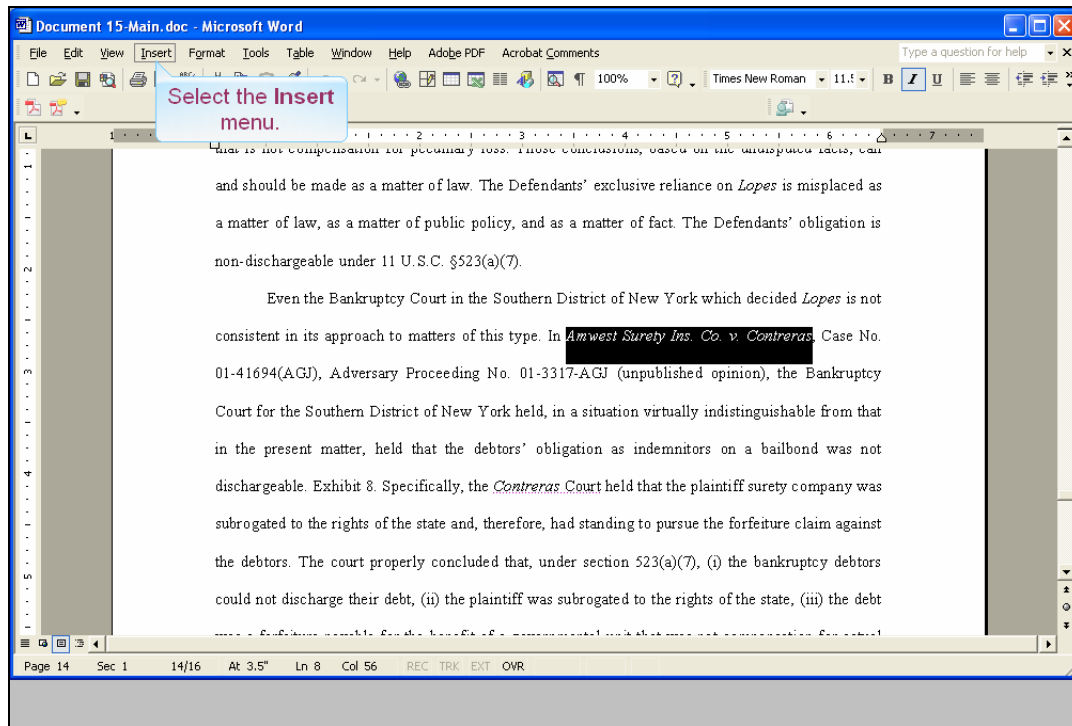


Slide 19

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



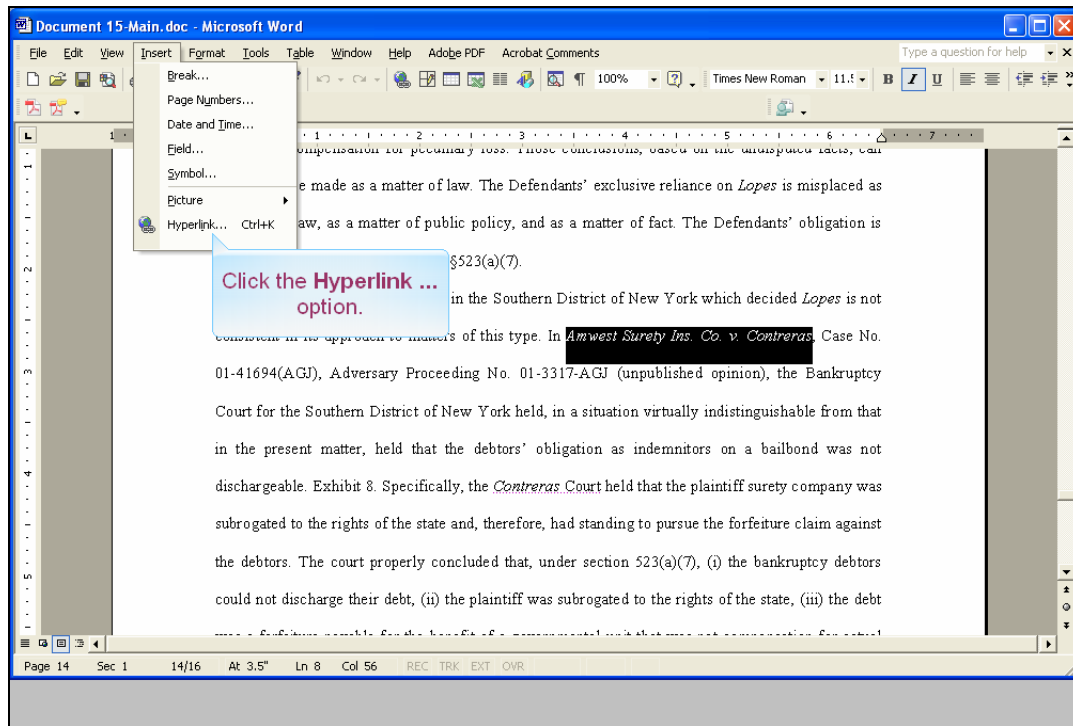
Slide 20
Slide notes:



Slide 21

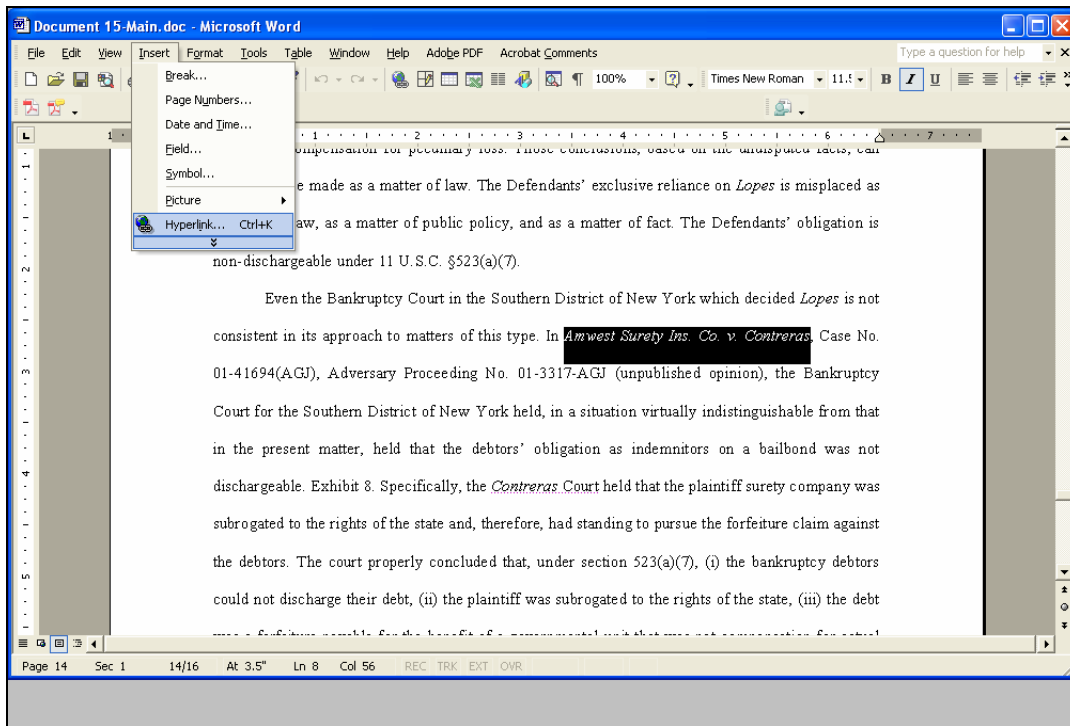
Slide notes: Word now selects the text.

To create the hyperlink for the selected text, click Insert on the toolbar.



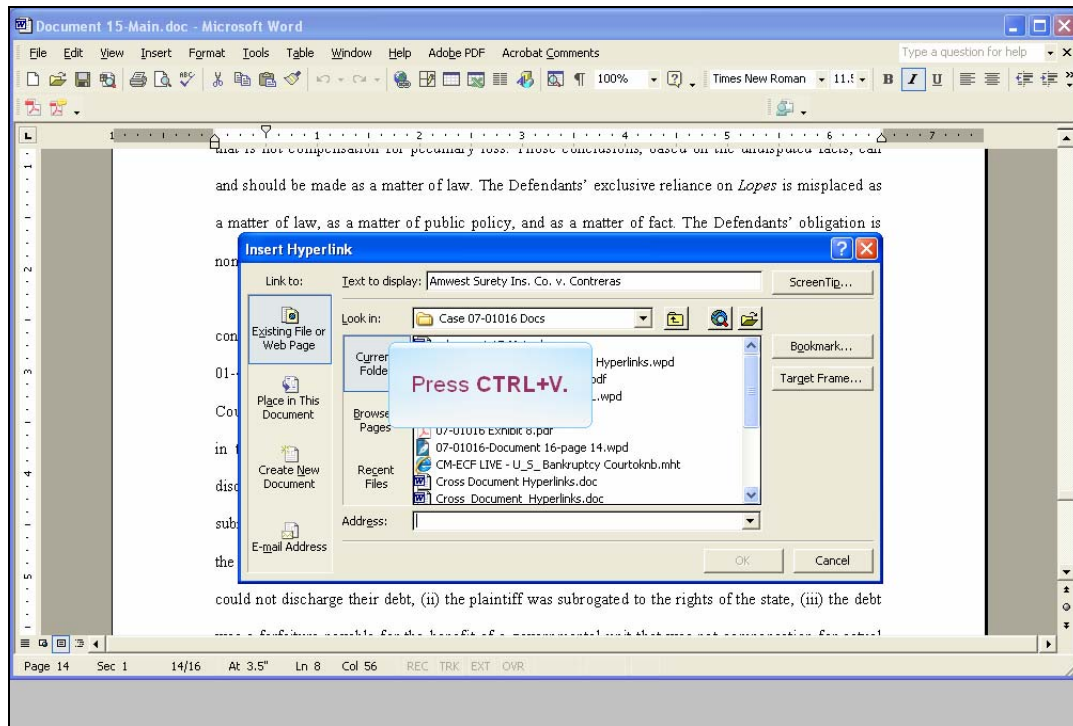
Slide 22

Slide notes: From the drop-down menu, select Hyperlink ...



Slide 23

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

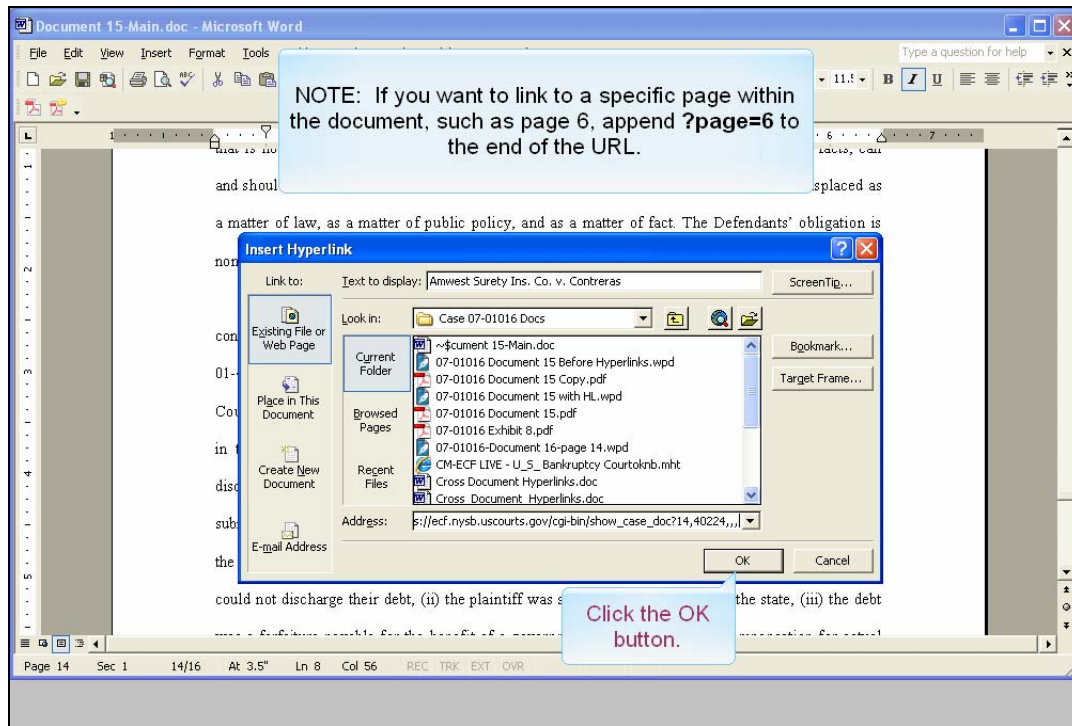


Slide 24

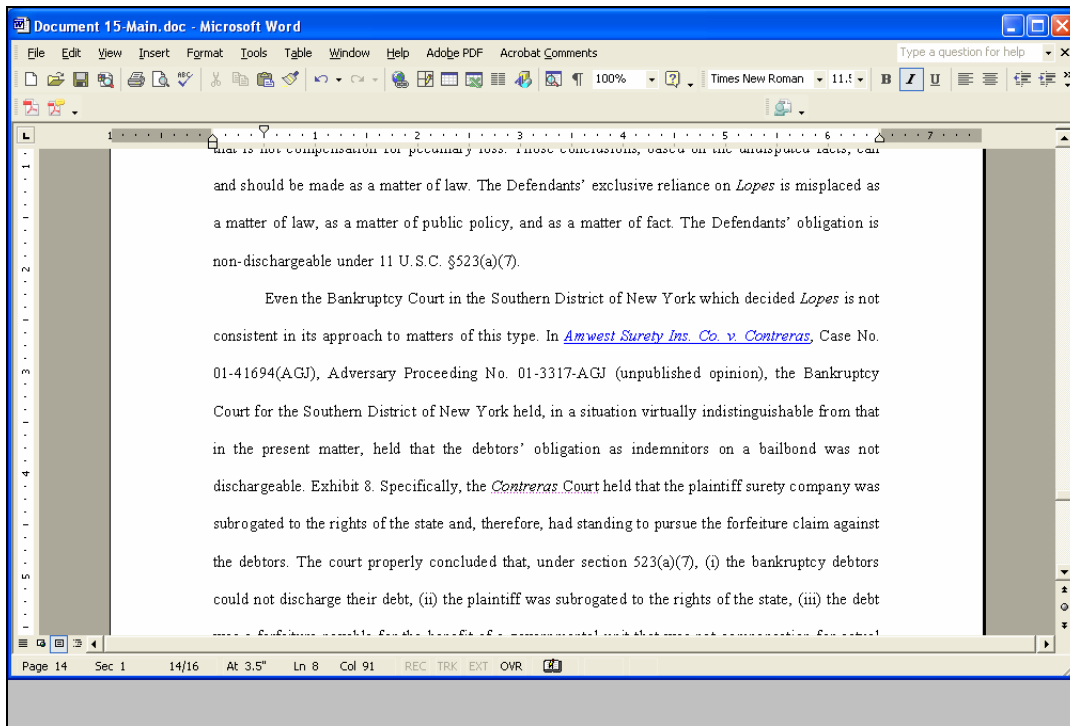
Slide notes: An Insert Hyperlink dialog box opens. We're going to paste the URL that Windows copied to the clipboard earlier into the (Address:) field. Like selecting text, there are

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.

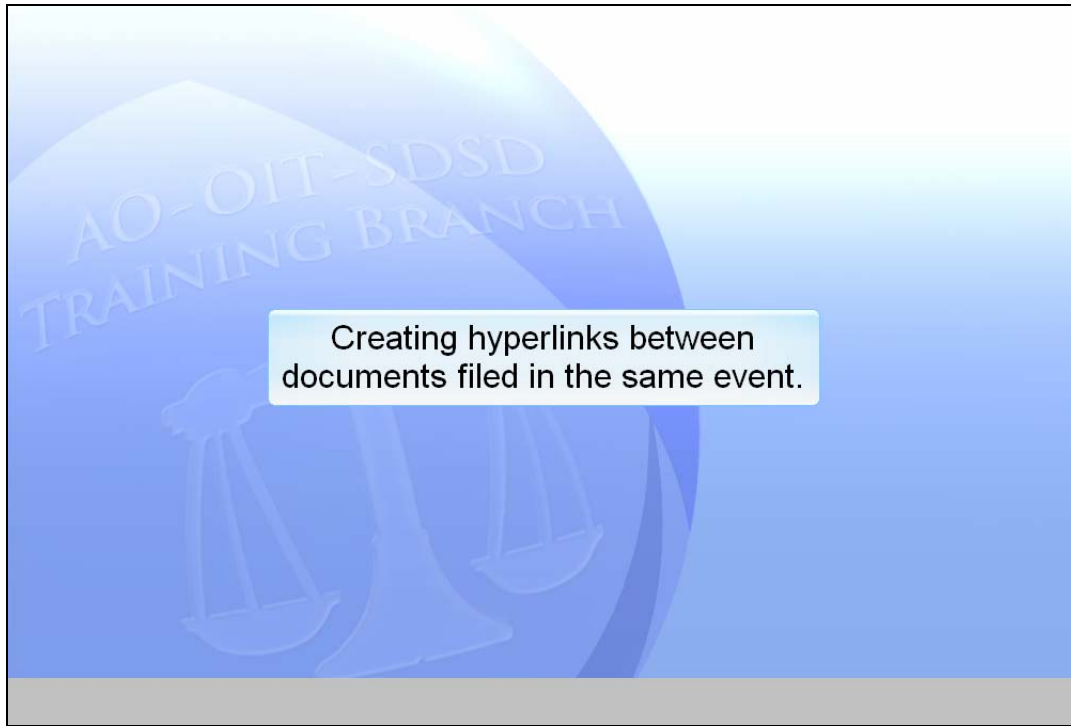


Slide 25
Slide notes: s



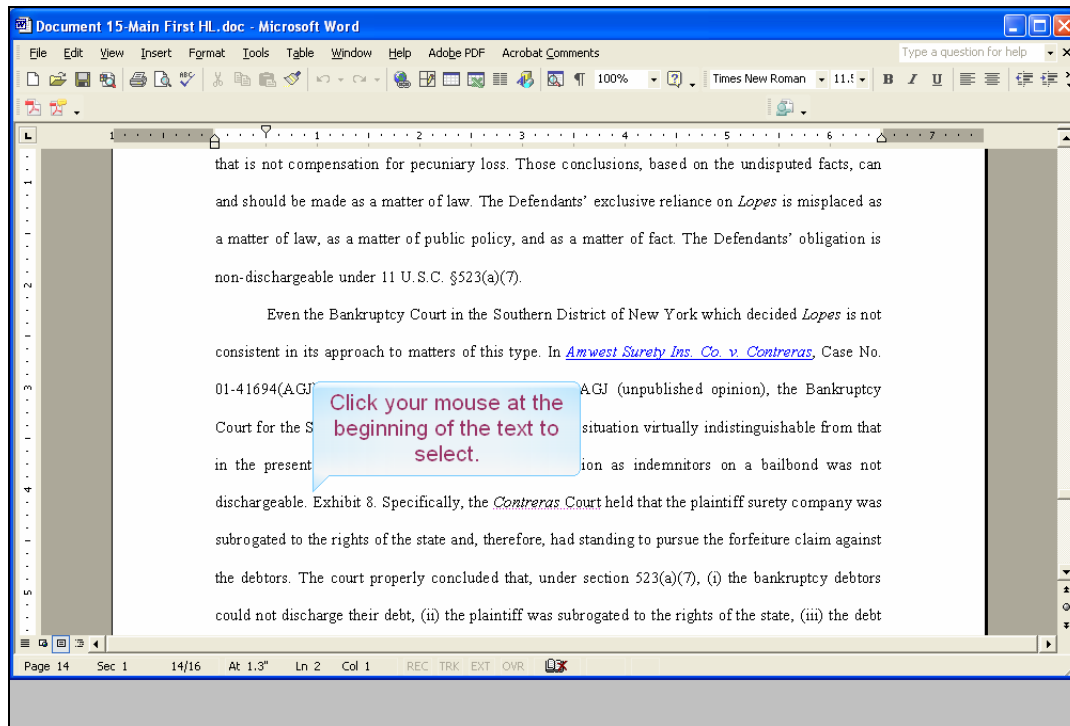
Slide 26

Slide notes: Word has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue.



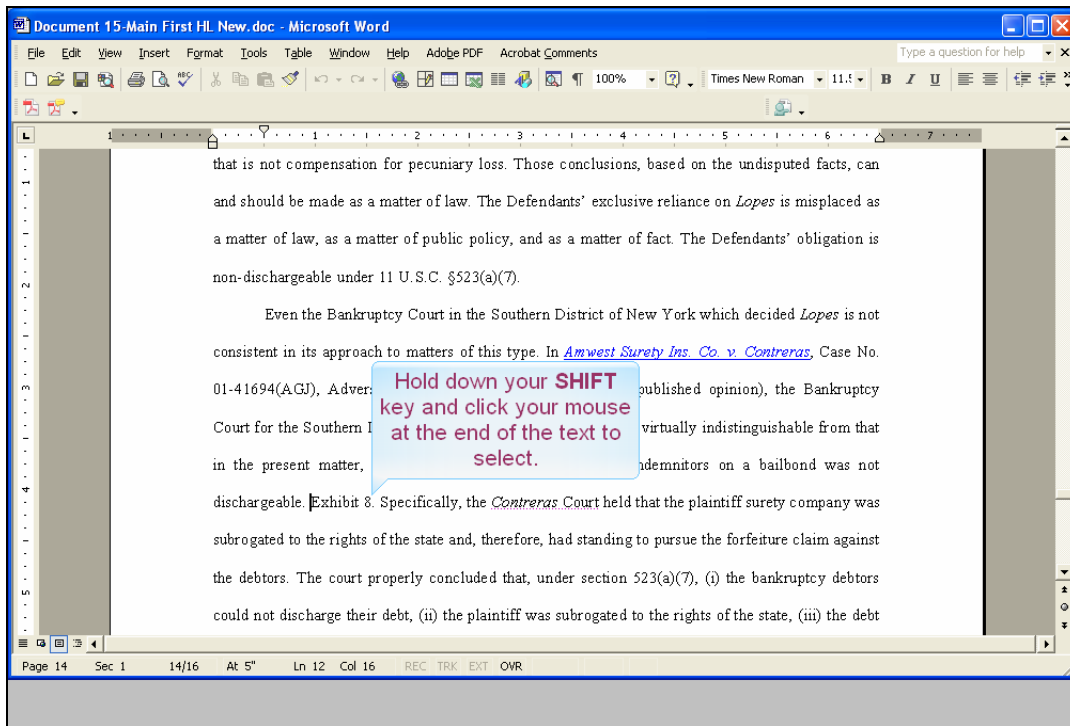
Hyperlinks - Documents filed in the same event

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.



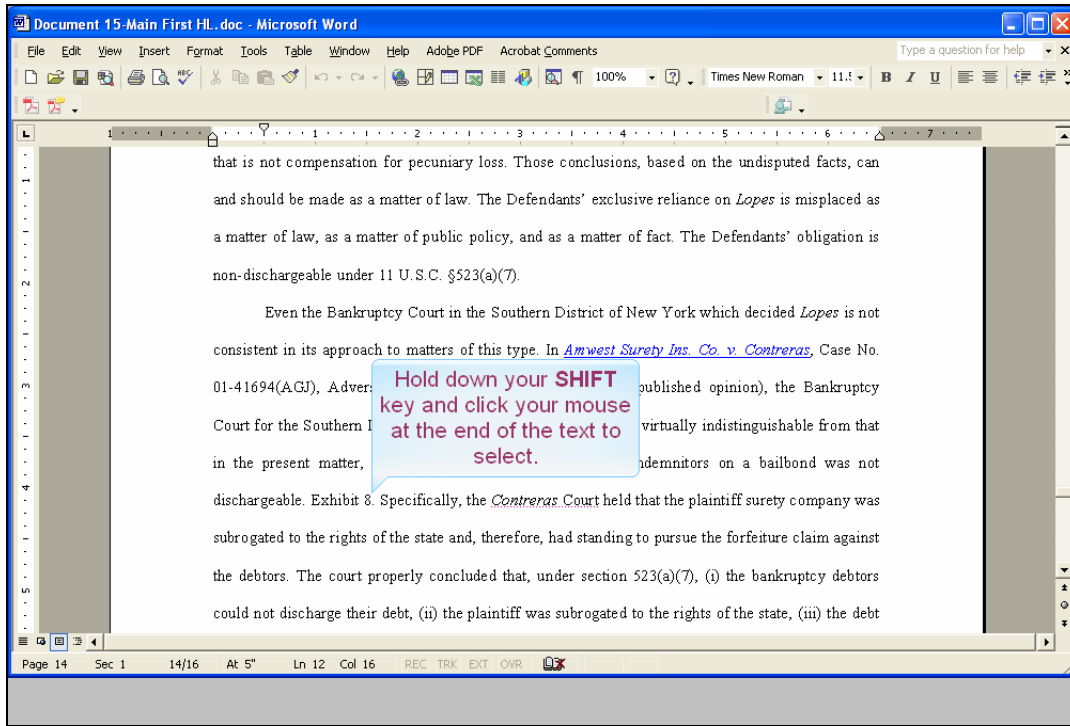
Slide 28

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.

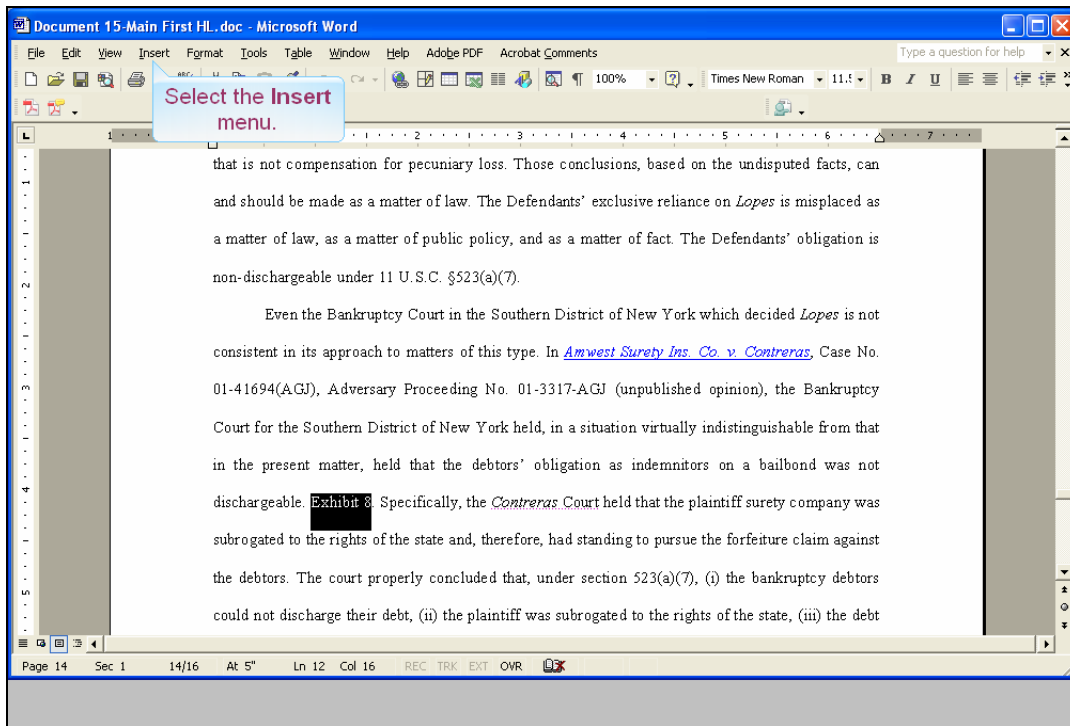


Slide 29

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

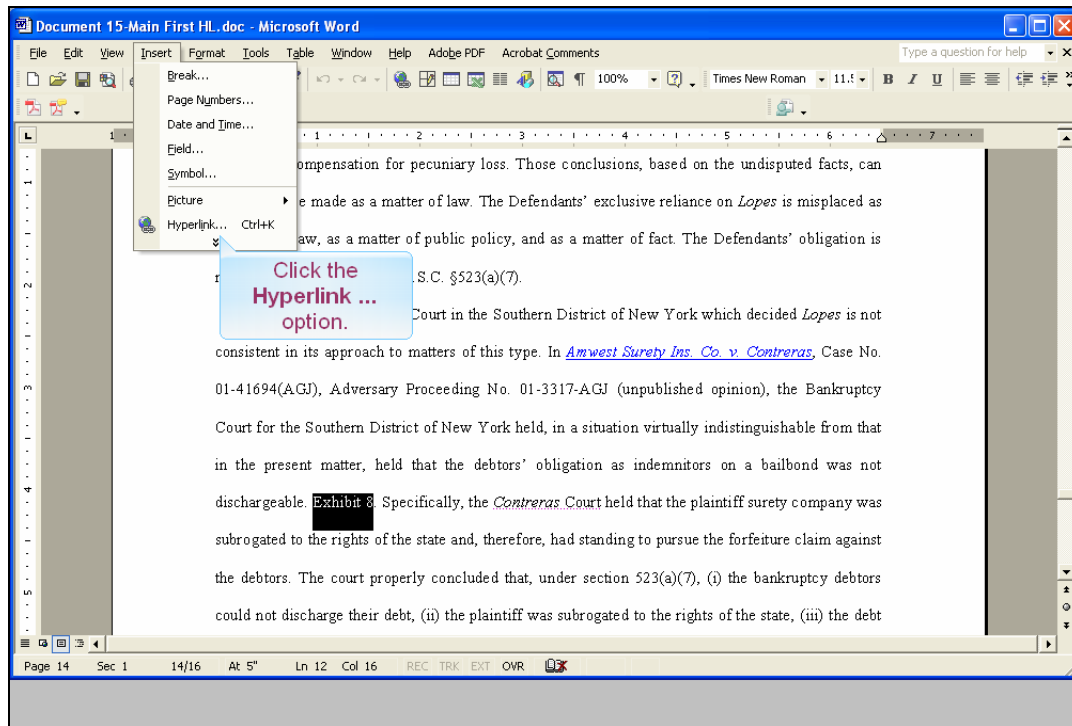


Slide 30
Slide notes:



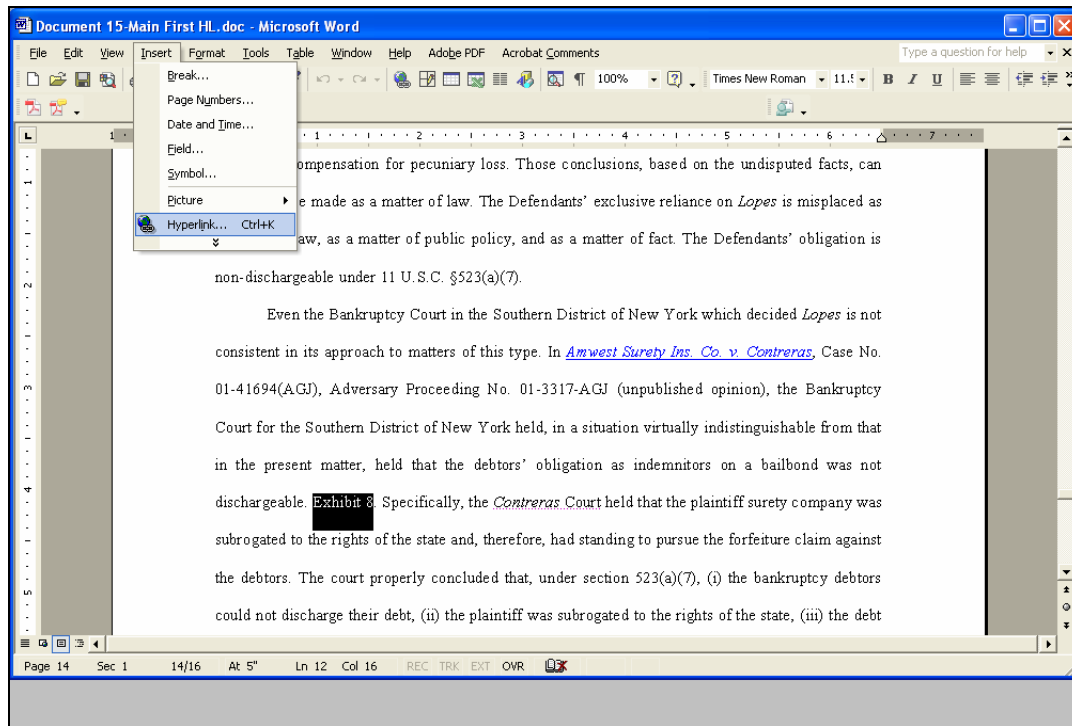
Slide 31

Slide notes: Word selects the text. Now, click the Insert menu item.



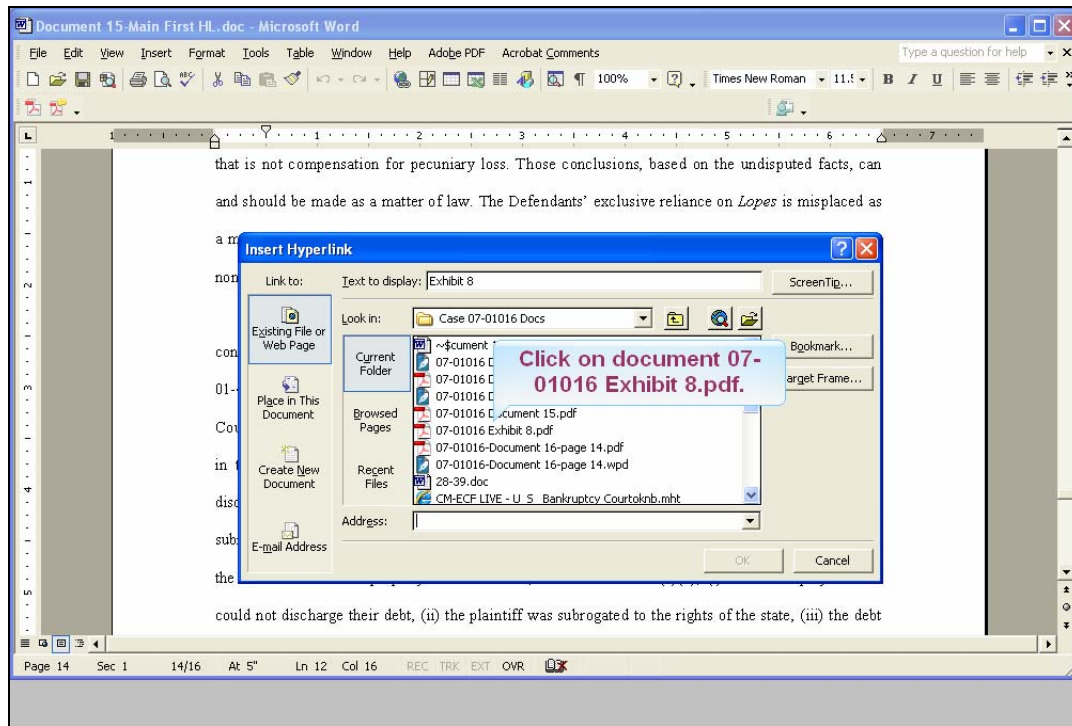
Slide 32

Slide notes: From the drop-down menu, select Hyperlink ...



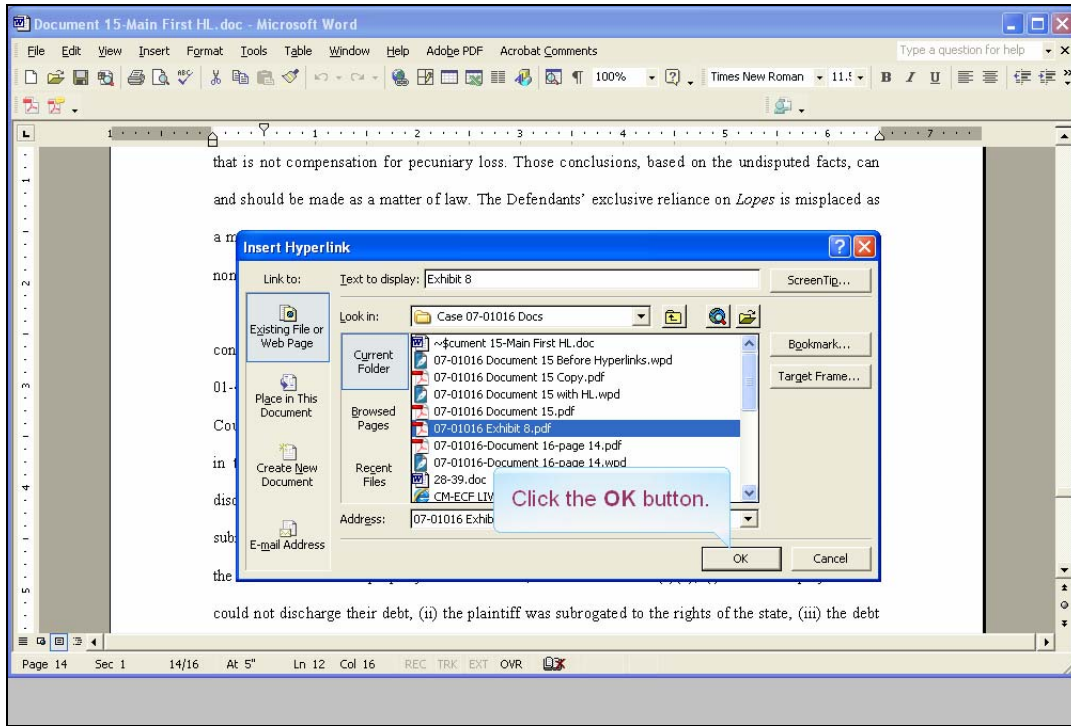
Slide 33

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



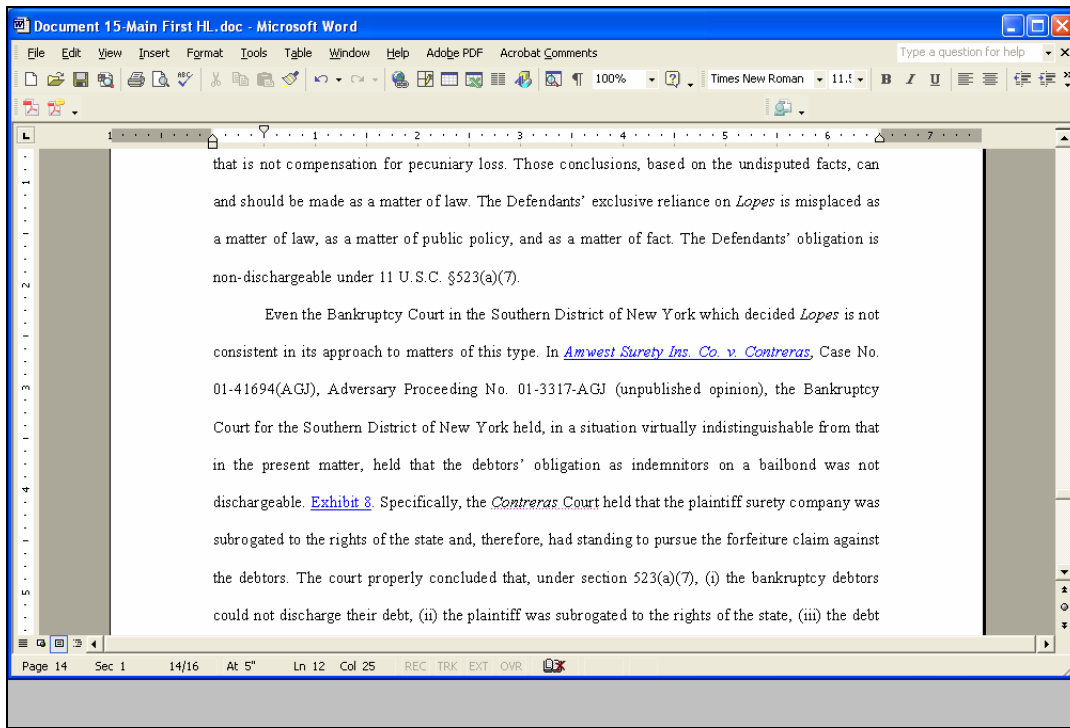
Slide 34

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.

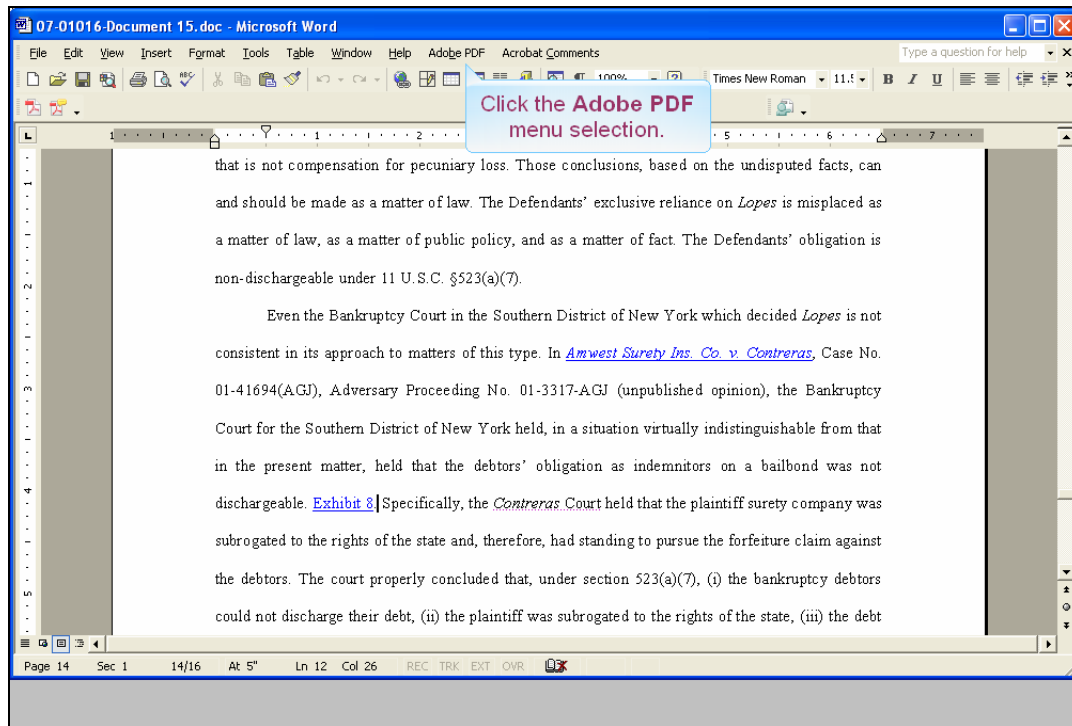


Slide 36
Slide notes: Word has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue. We are now ready to publish our Word document to PDF.



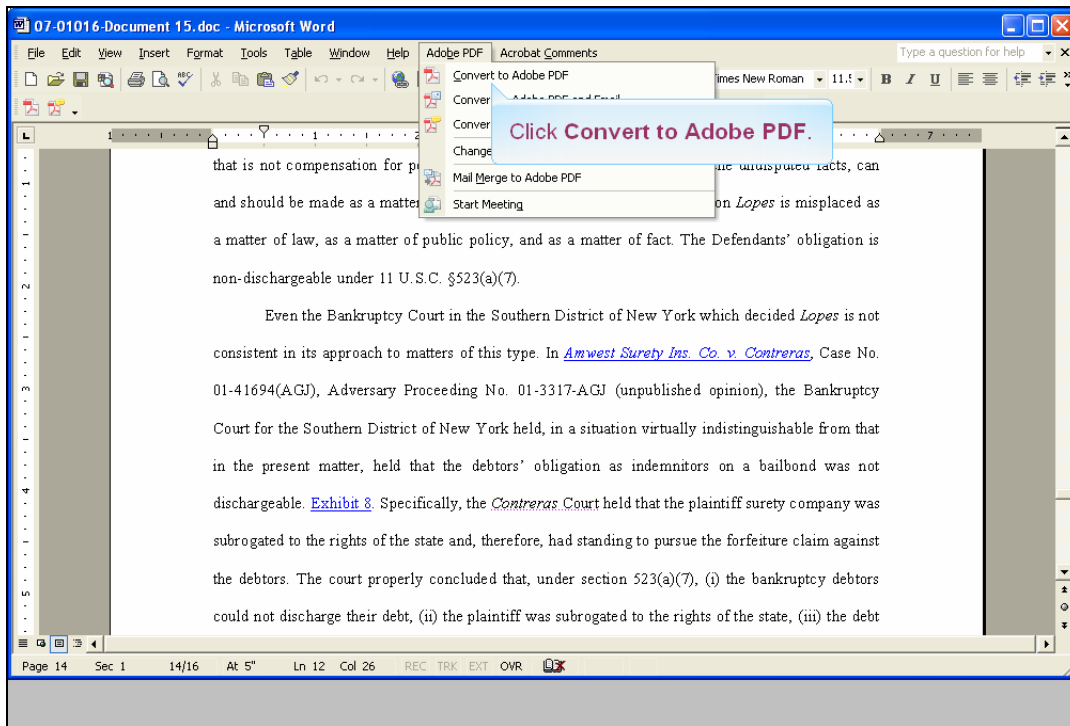
Publish to PDF

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



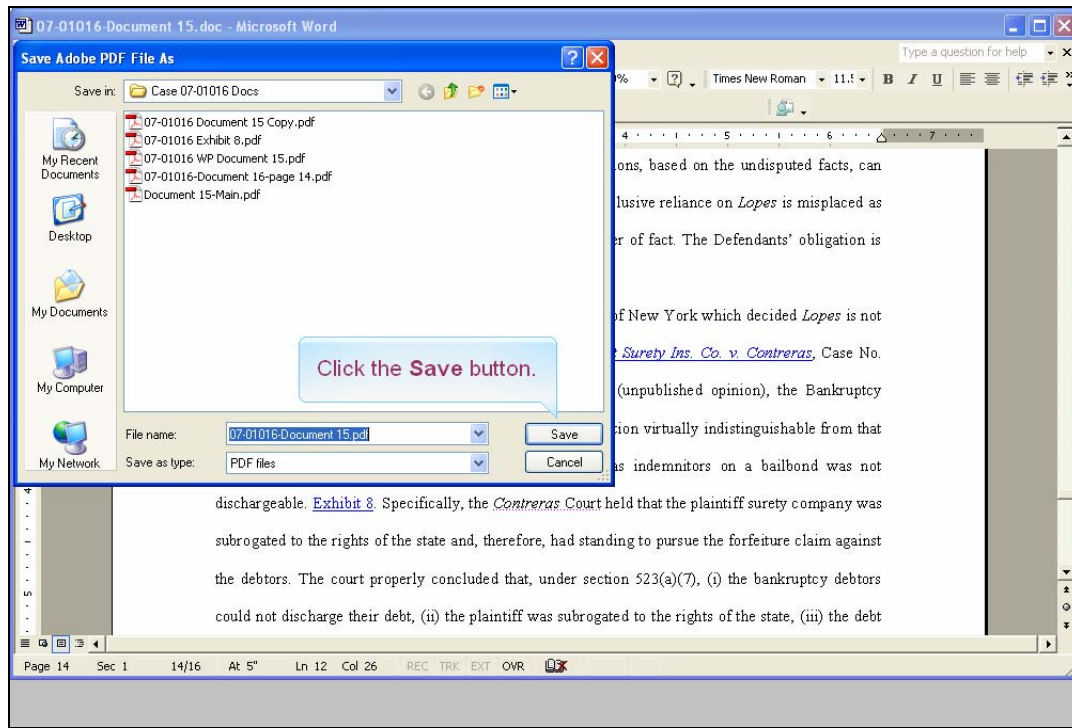
Slide 38

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.



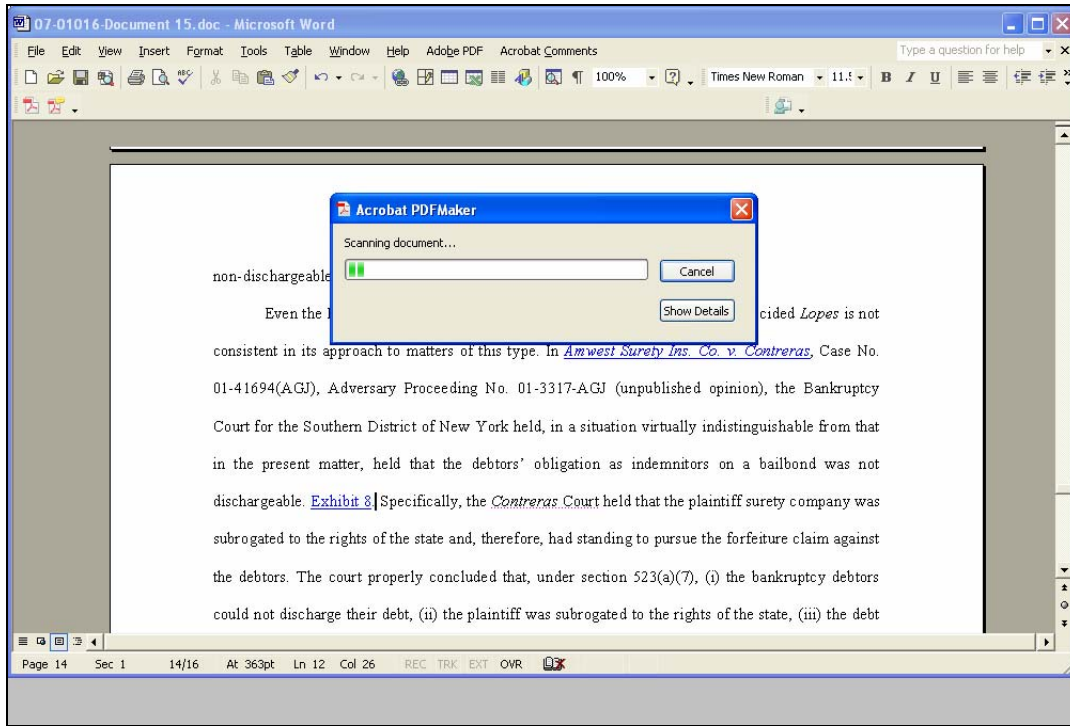
Slide 39

Slide notes: On the Adobe PDF drop-down menu, click on Convert to Adobe PDF.



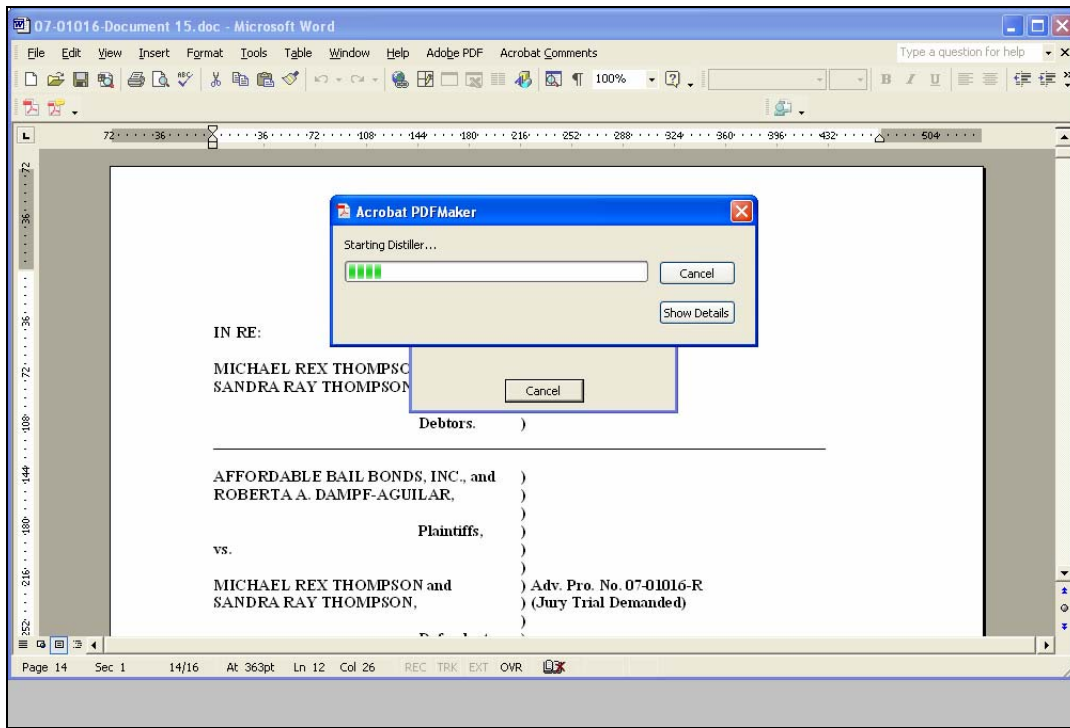
Slide 40

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.



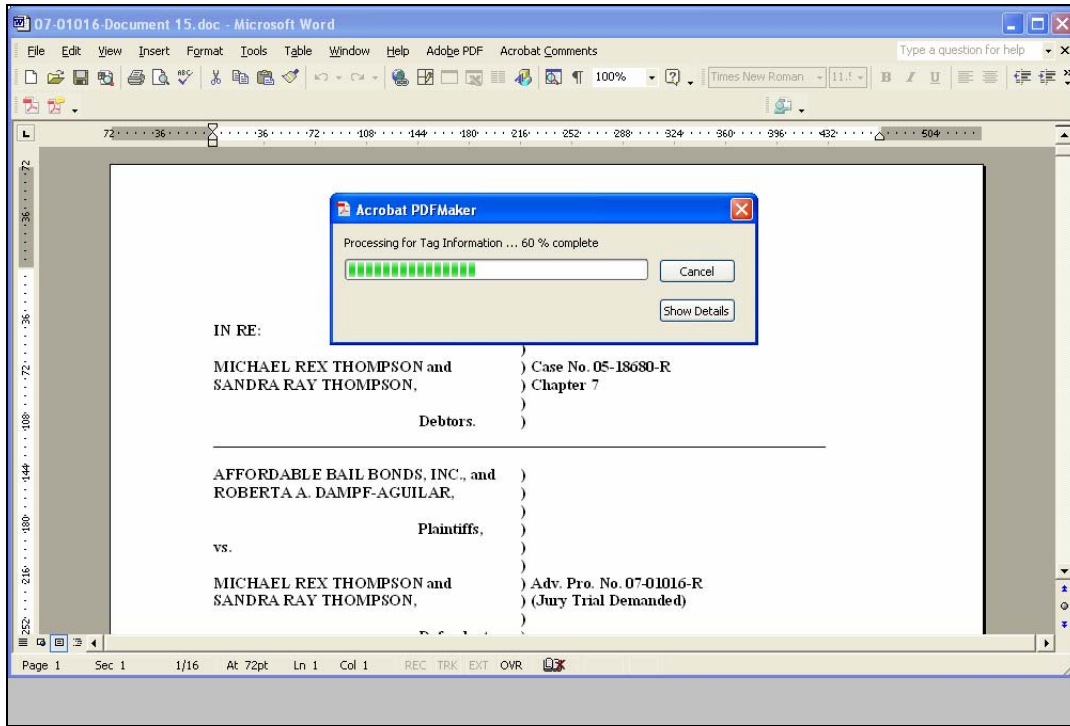
Slide 41

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



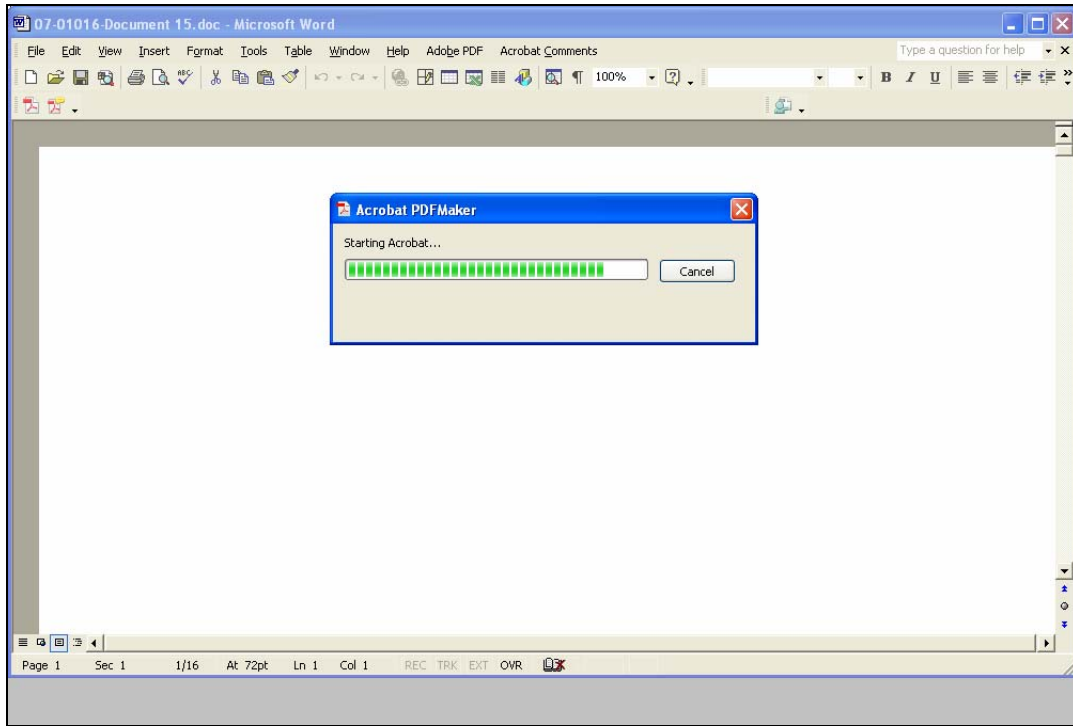
Slide 42

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



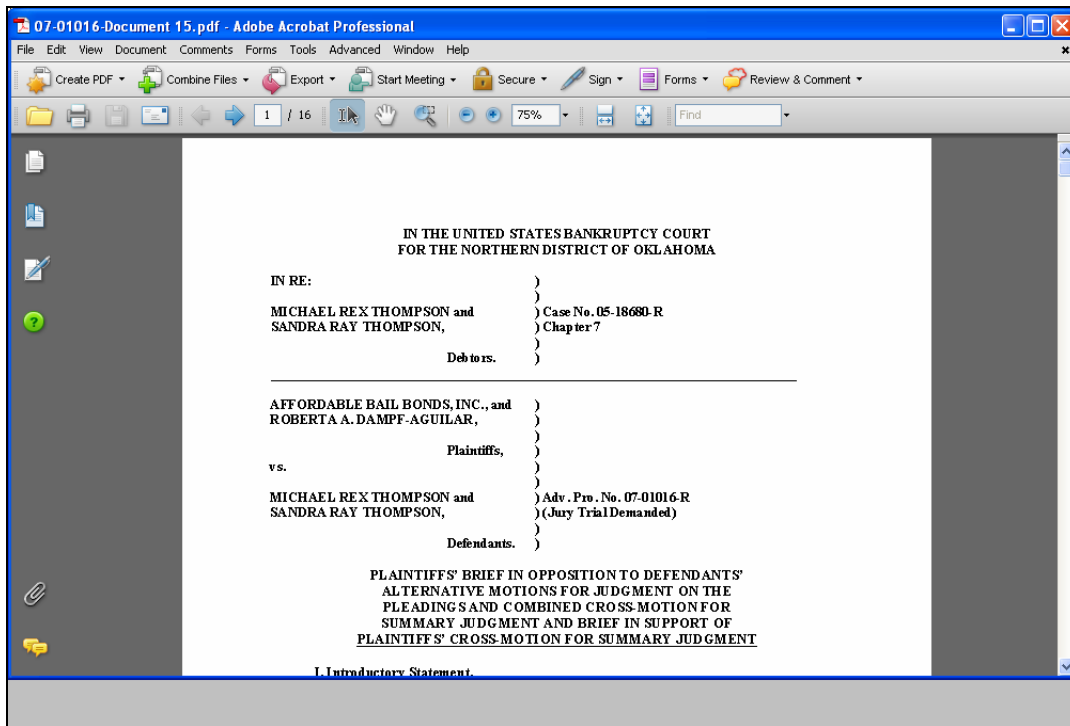
Slide 43

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

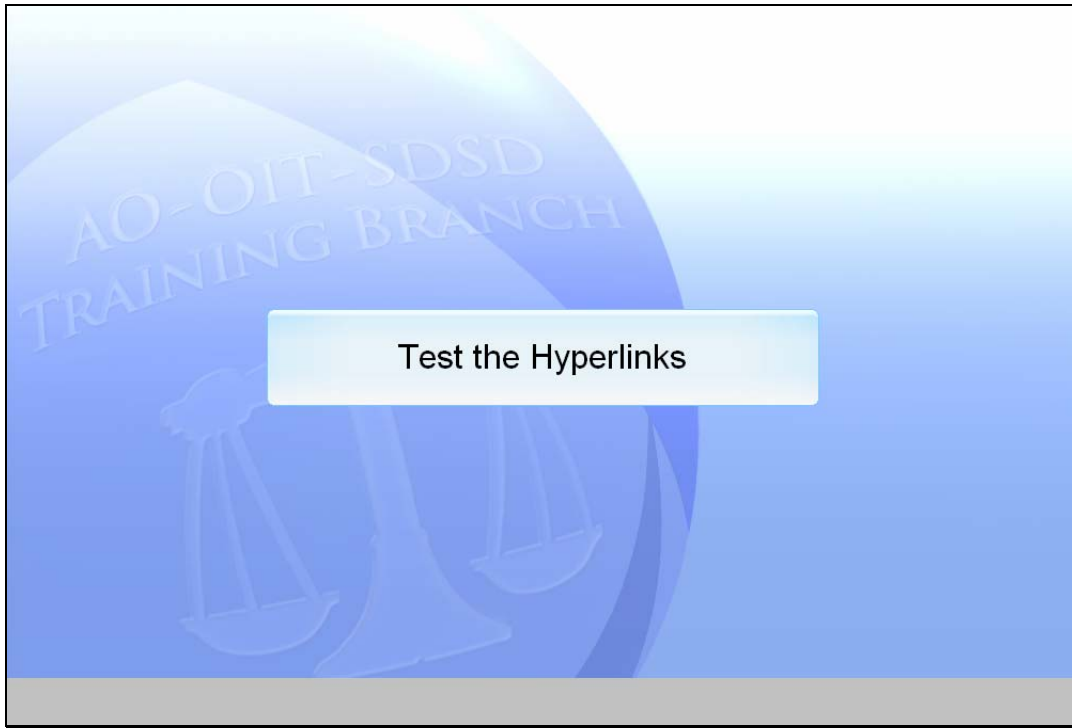


Slide 44

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

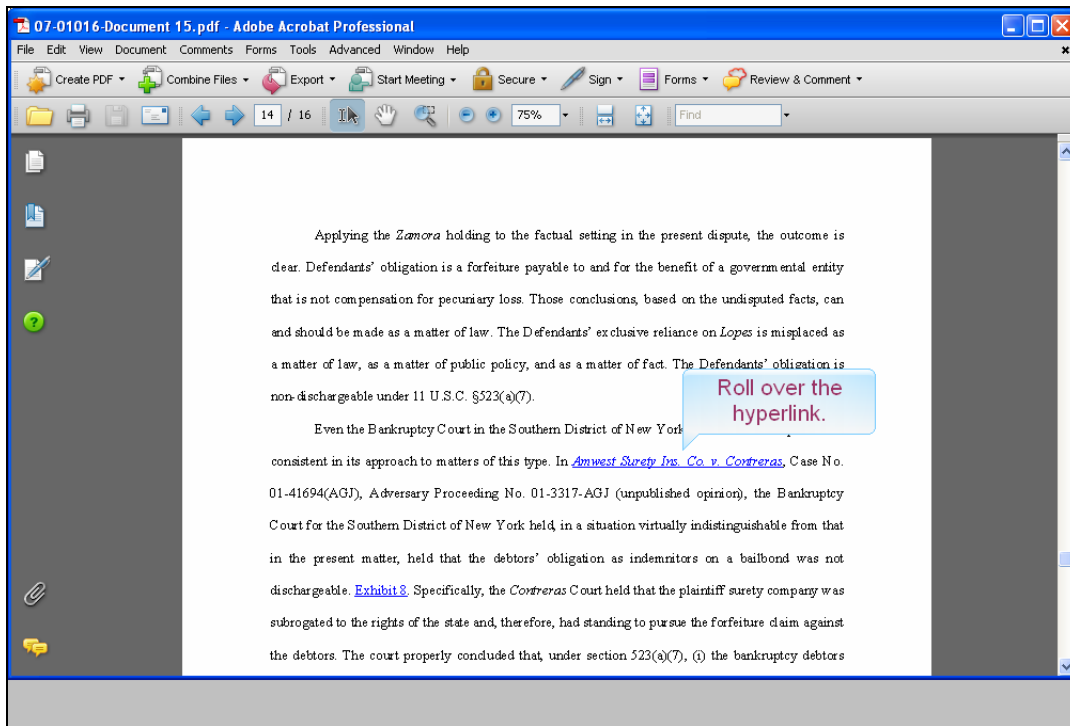


Slide 45
Slide notes: The document has now been published, or converted, to PDF. It's ready to be filed with the court. But, it might be a good idea to check the hyperlinks in our PDF file to make sure they are linked to the correct documents. We'll do that next.



Test the Hyperlinks

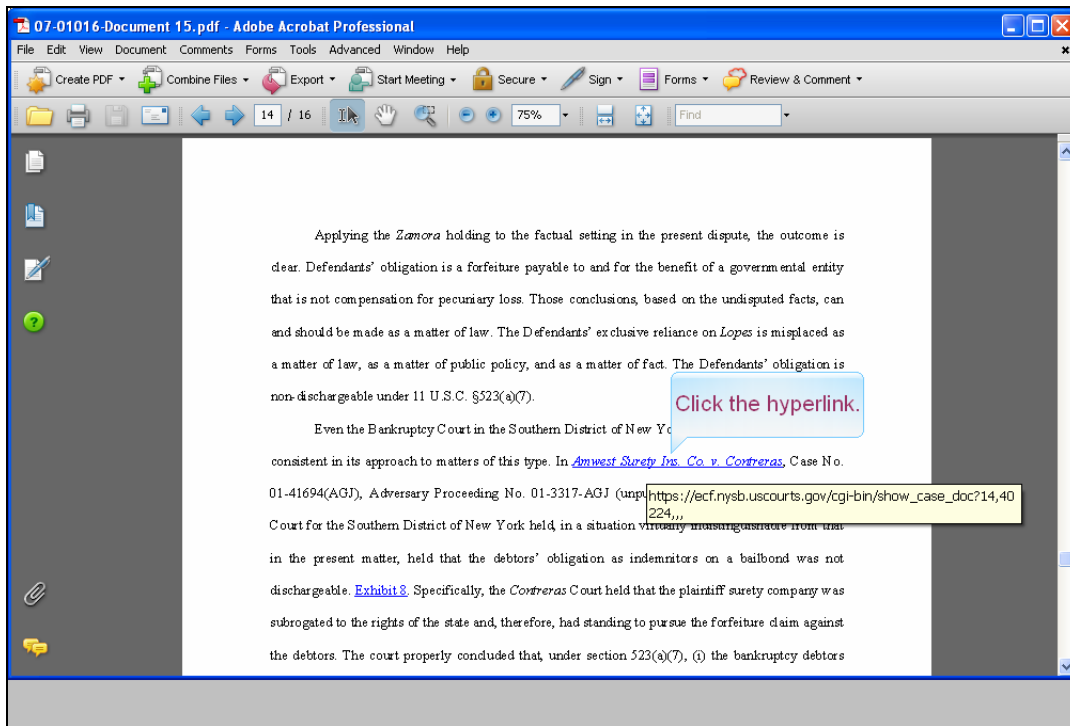
Slide notes: (Note: This is a transition slide.)



Slide 47

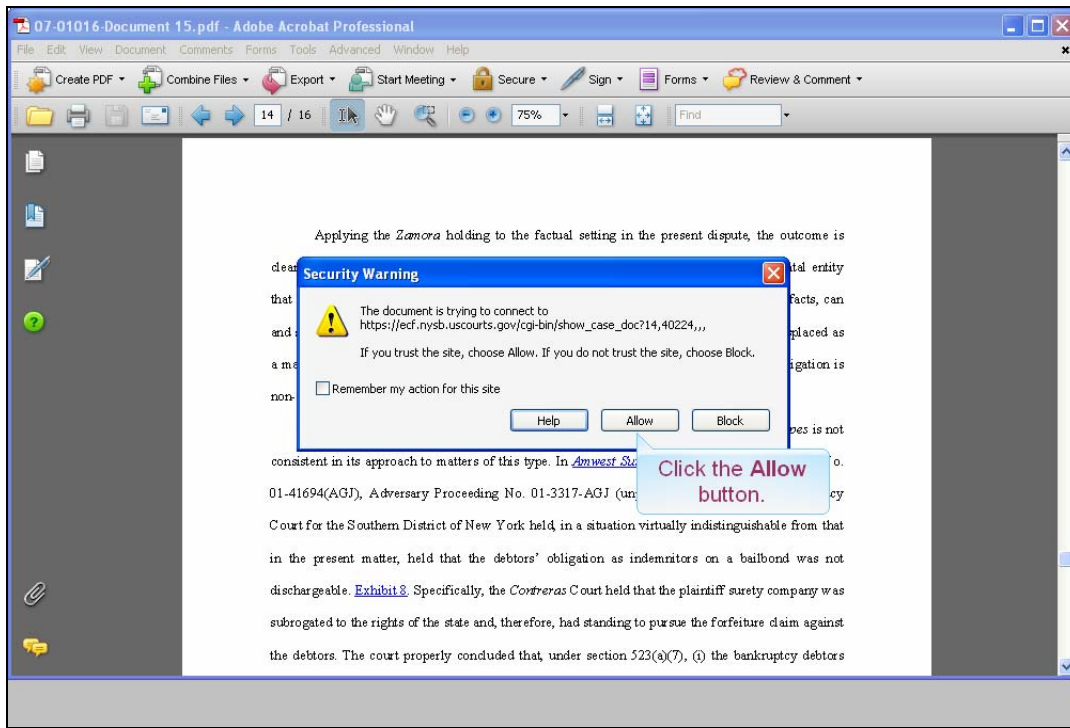
Slide notes: We've now opened the PDF version of the brief and moved to the page that has our hyperlinks. We're going to test the hyperlinks to make sure they link to the correct

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.



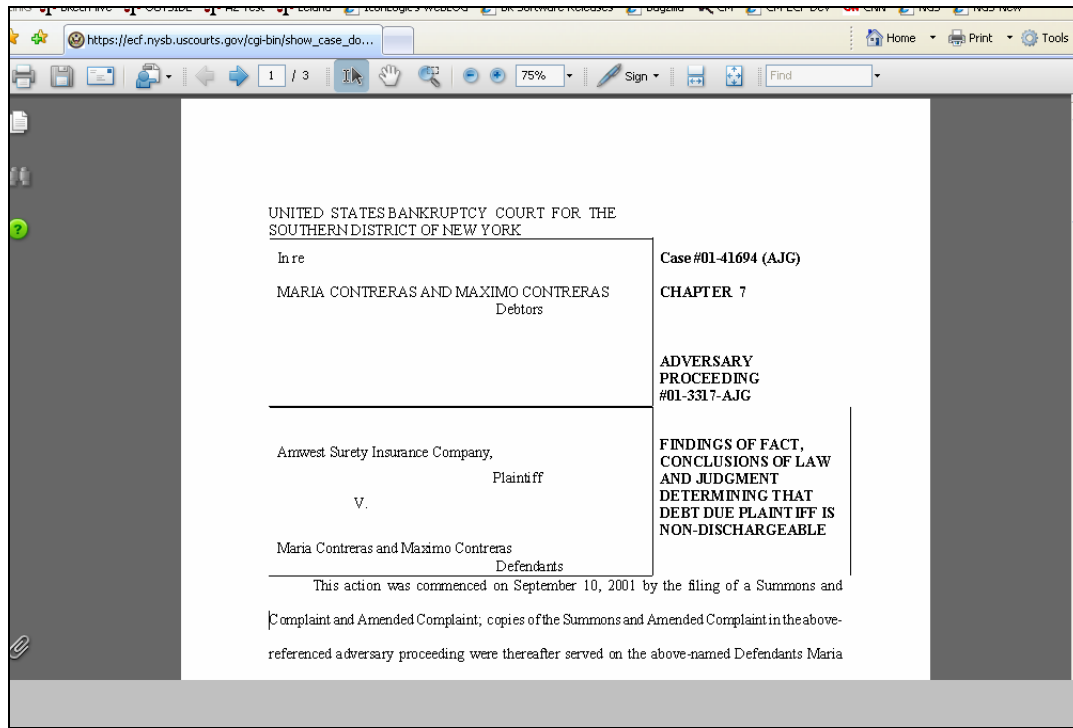
Slide 48

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



Slide 49

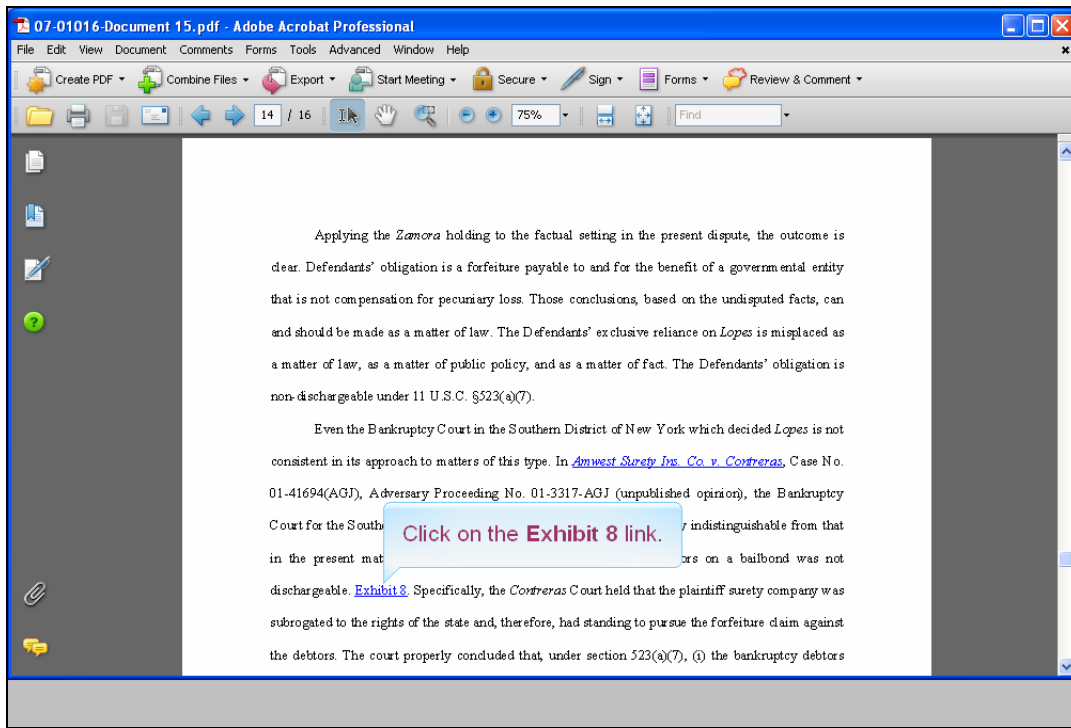
Slide notes: A Security Warning appears. Since we trust the Bankruptcy Court web site, click the Allow button.



Slide 50

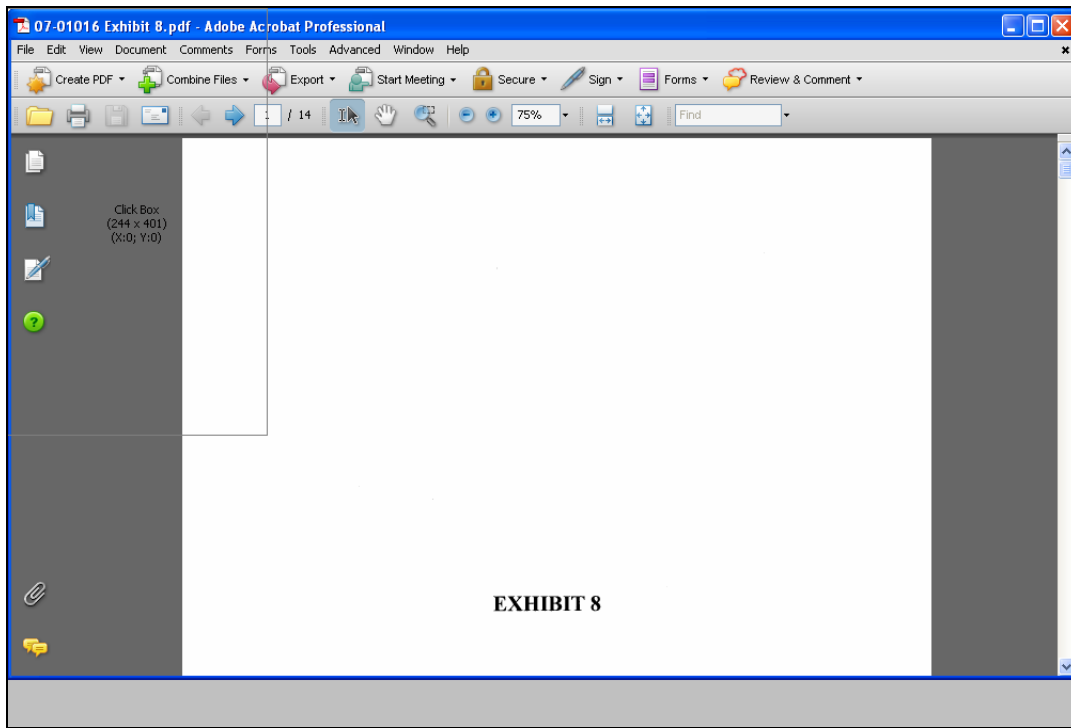
Slide notes: Having logged into PACER, the Findings of Fact, Conclusions of Law PDF document opens and we can verify that this is indeed the document we wish to reference in our brief.

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



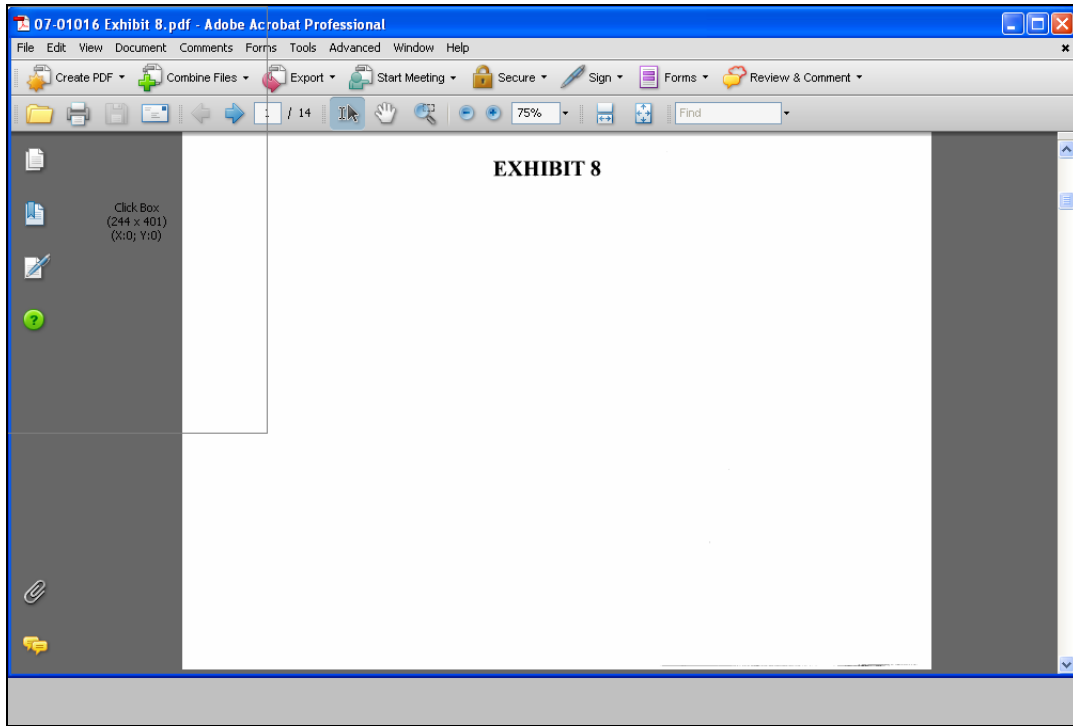
Slide 51

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.

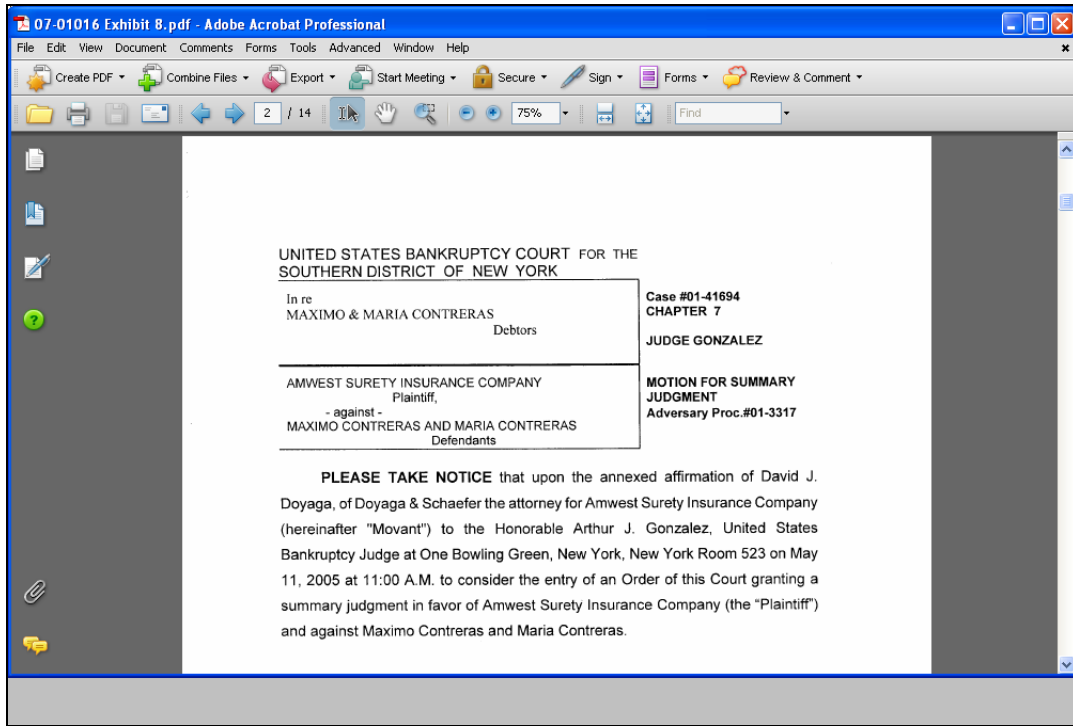


Slide 52

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.

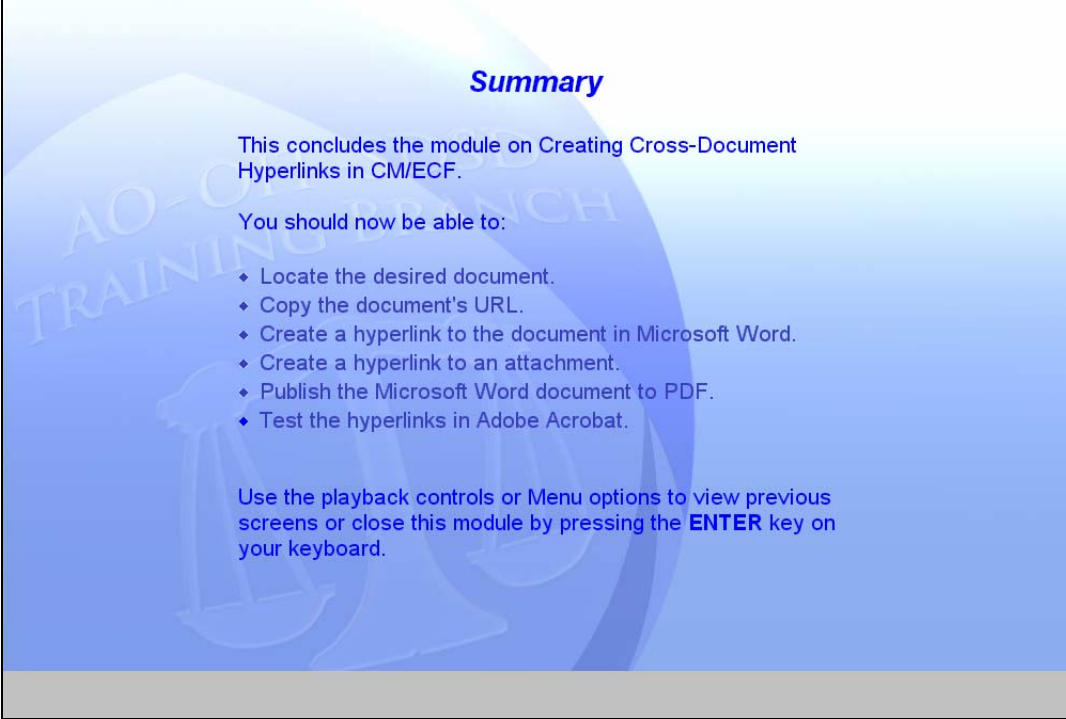


Slide 53
Slide notes:



Slide 54

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



Summary

This concludes the module on Creating Cross-Document Hyperlinks in CM/ECF.

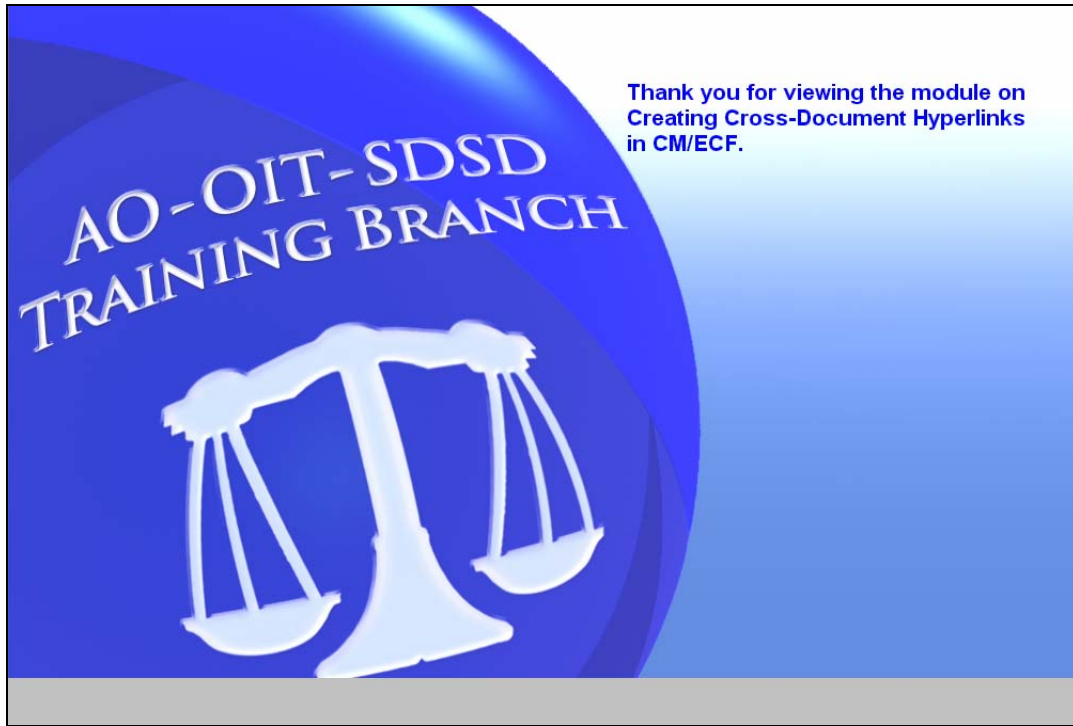
You should now be able to:

- ◆ Locate the desired document.
- ◆ Copy the document's URL.
- ◆ Create a hyperlink to the document in Microsoft Word.
- ◆ Create a hyperlink to an attachment.
- ◆ Publish the Microsoft Word document to PDF.
- ◆ Test the hyperlinks in Adobe Acrobat.

Use the playback controls or Menu options to view previous screens or close this module by pressing the **ENTER** key on your keyboard.

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.