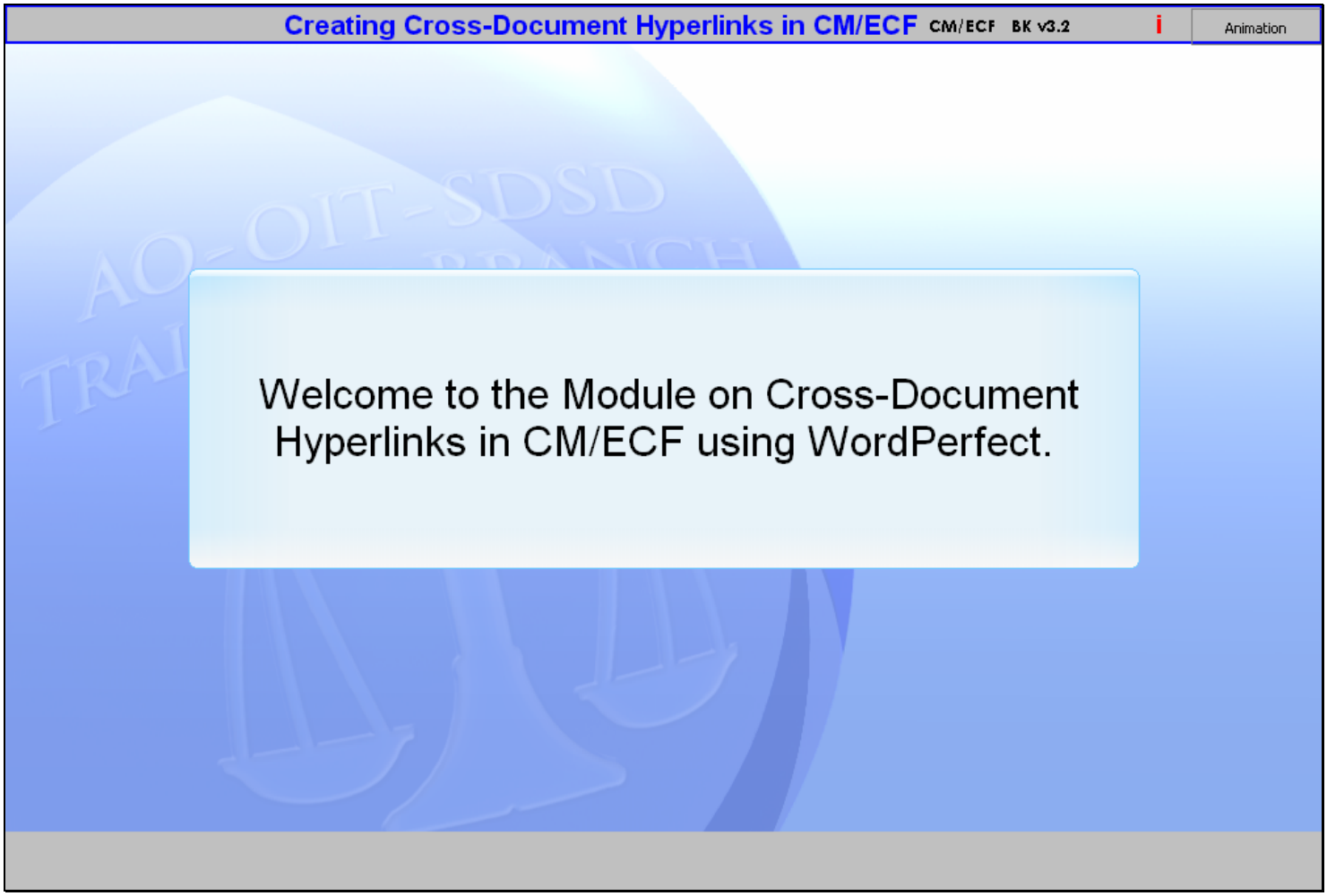
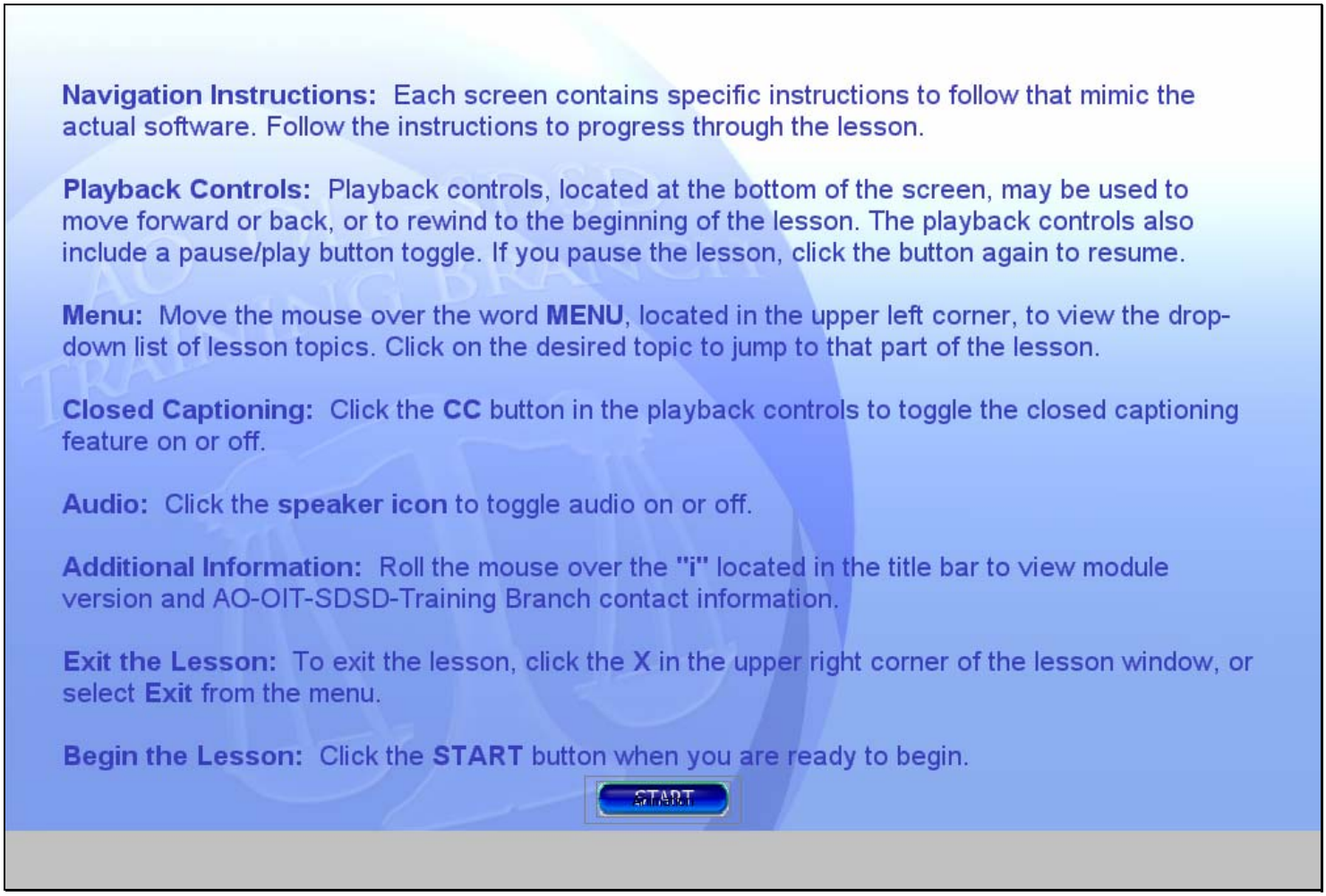
Slide 1 - Welcome



Slide notes

Welcome to the Module on Cross-Document Hyperlinks in CM/ECF. In this module we will be using WordPerfect.

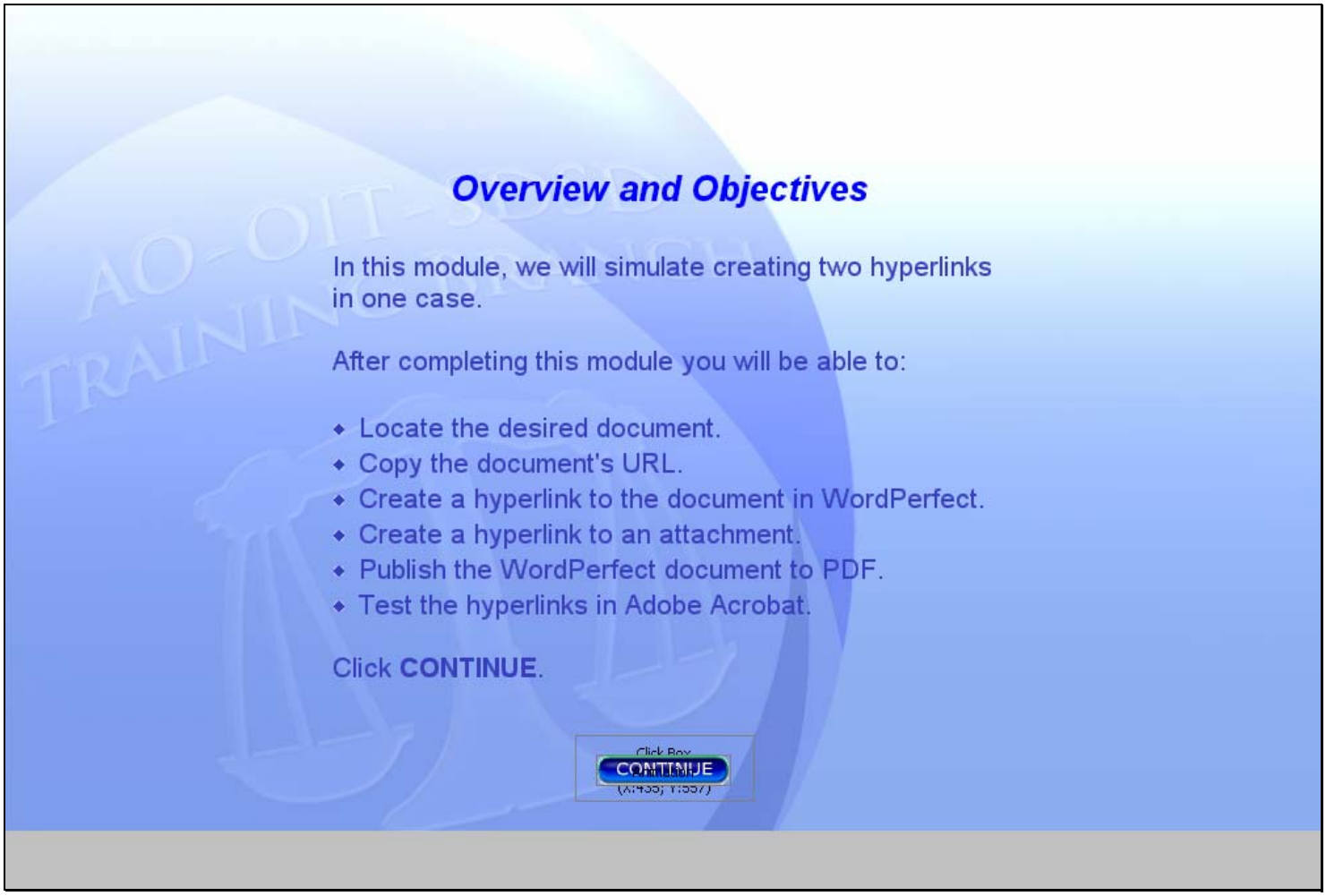
Slide 2 - Navigation



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.

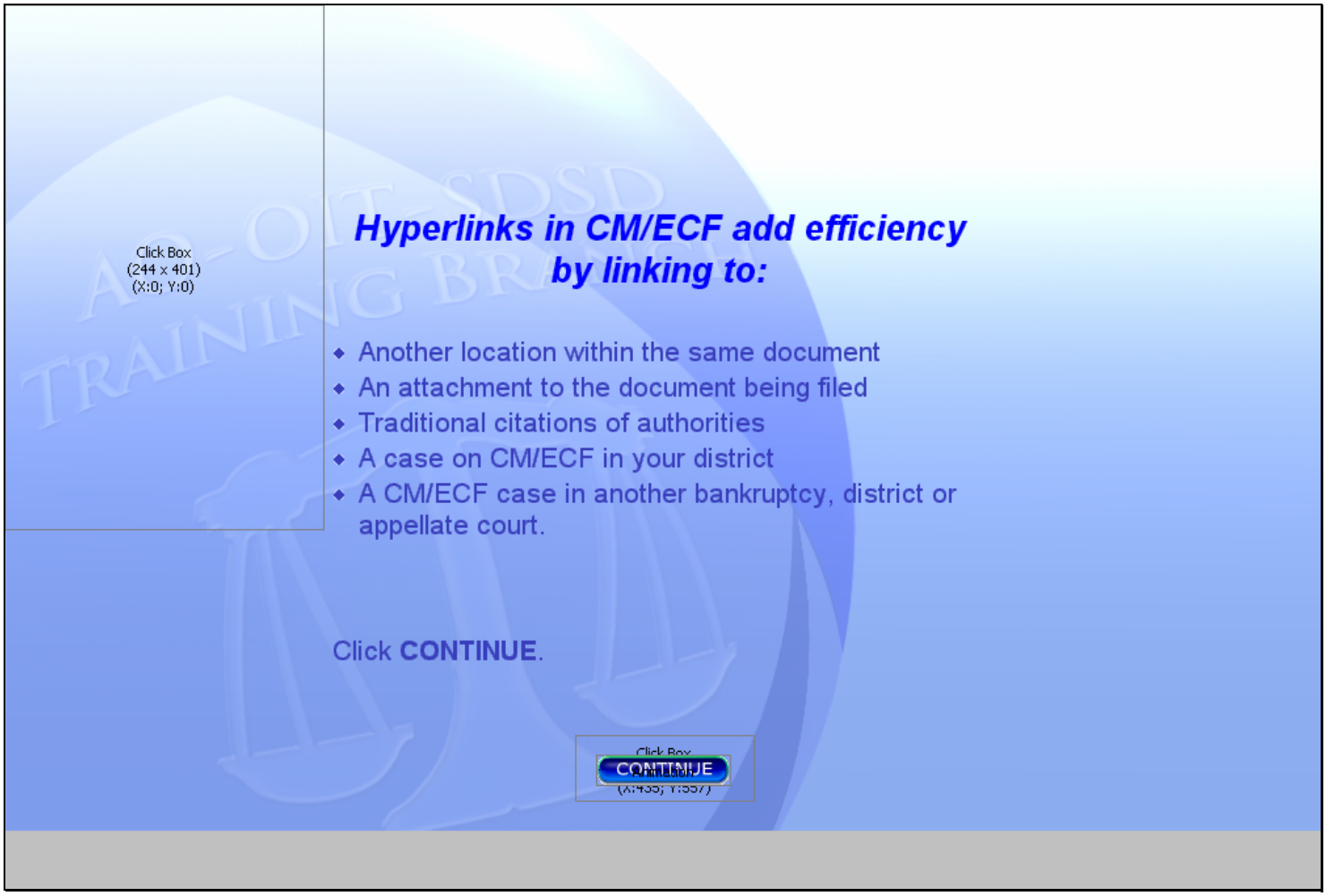
Slide 3 - Objectives



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 WordPerfect and add a hyperlink to the cited case in another court. Next, we'll create a hyperlink to an exhibit in the brief we are working on. Then we'll publish the WordPerfect 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. Click CONTINUE.

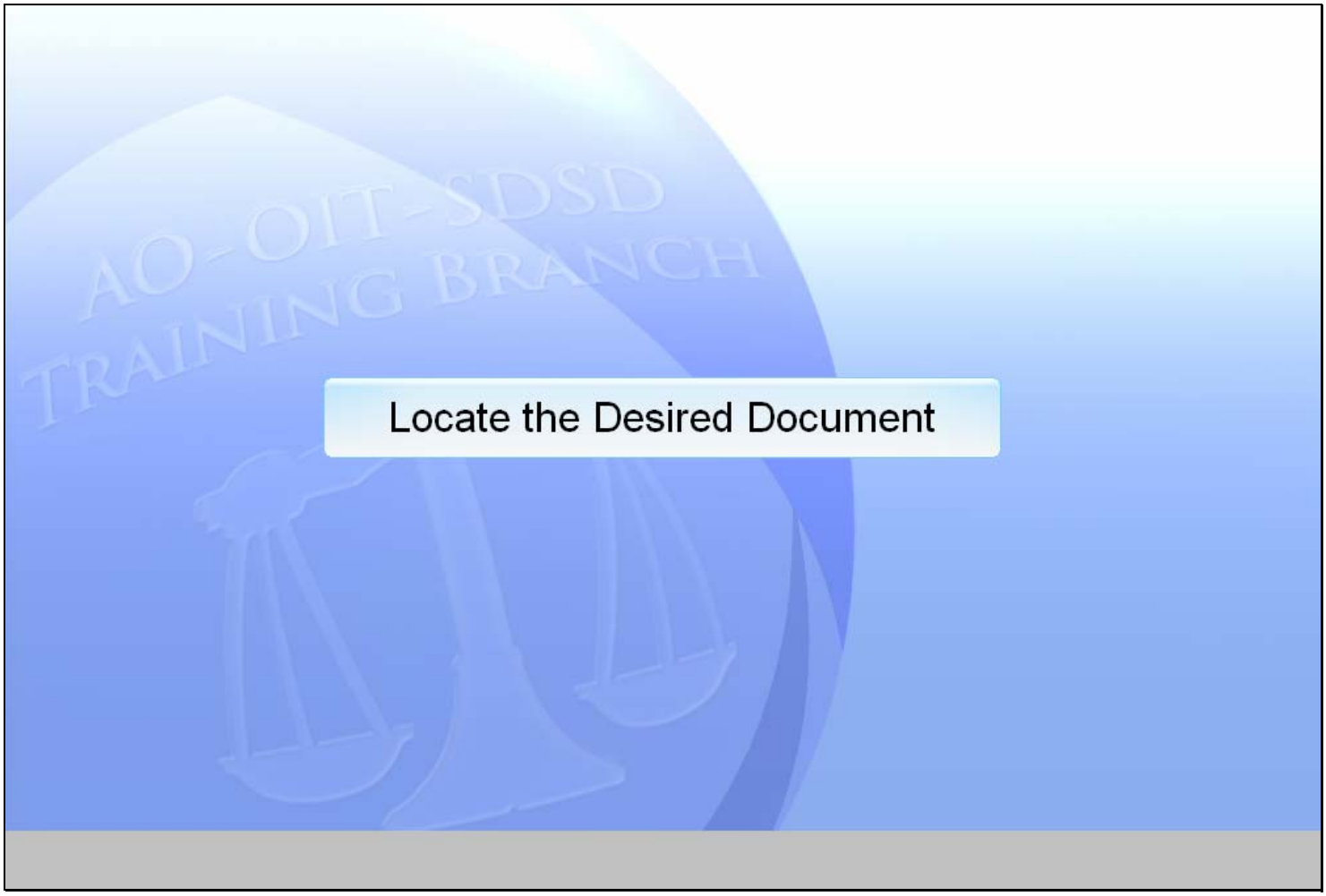
Slide 4 - Hyperlink Efficiency



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. To teach you the steps to creating hyperlinks for CM/ECF, you will be creating: An external link to another bankruptcy case in another court. An internal link to an attachment to the document you are filing. Click CONTINUE.

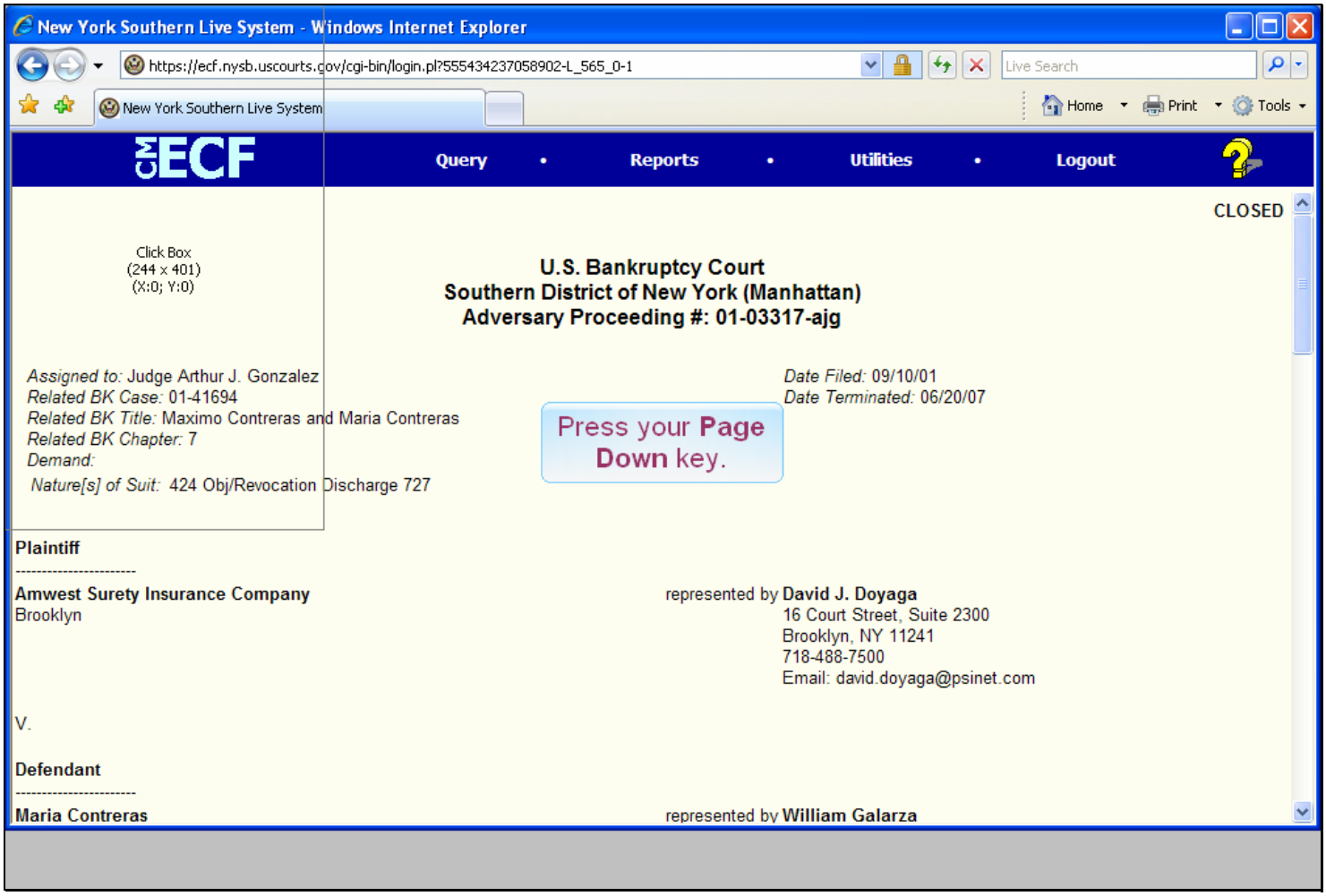
Slide 5 - Locate the Desired Document



Slide notes

Since the supporting citation is from a case in another court, we will access this case through PACER.

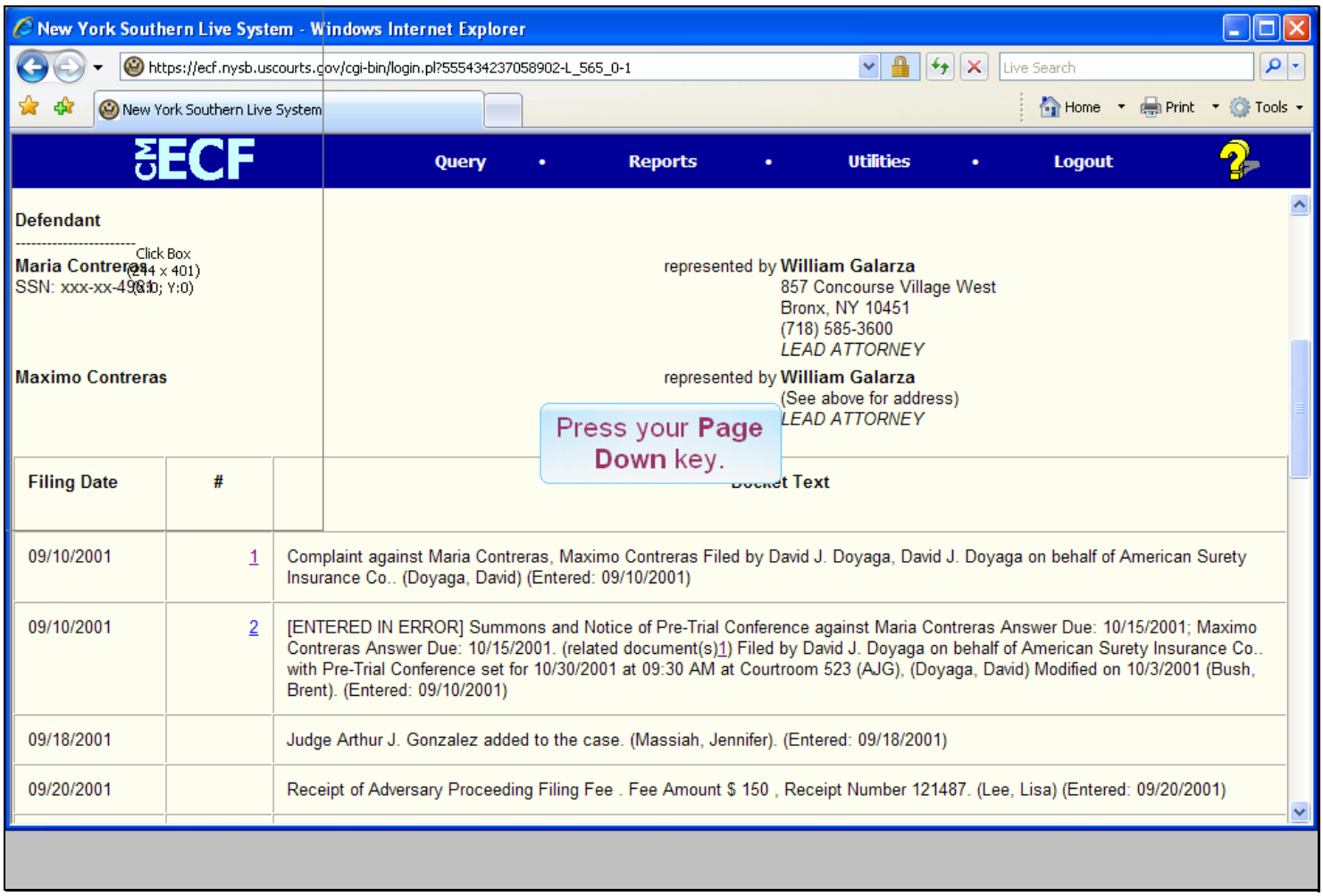
Slide 6 - Slide 6



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.

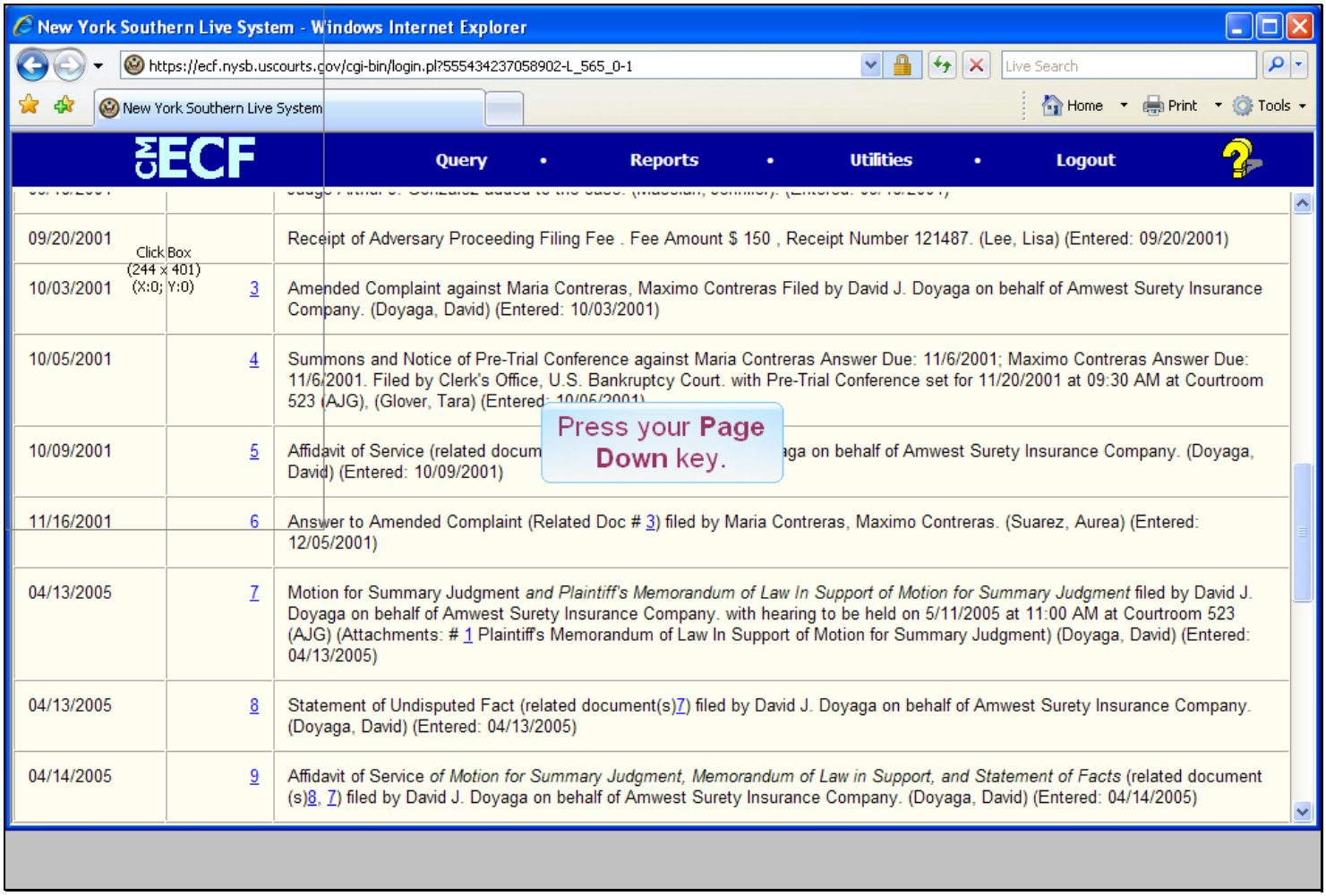
Slide 7 - Slide 7



Slide notes

(Note: This is a transition slide.)

Slide 8 - Slide 8



Slide notes

(Note: This is a transition slide.)

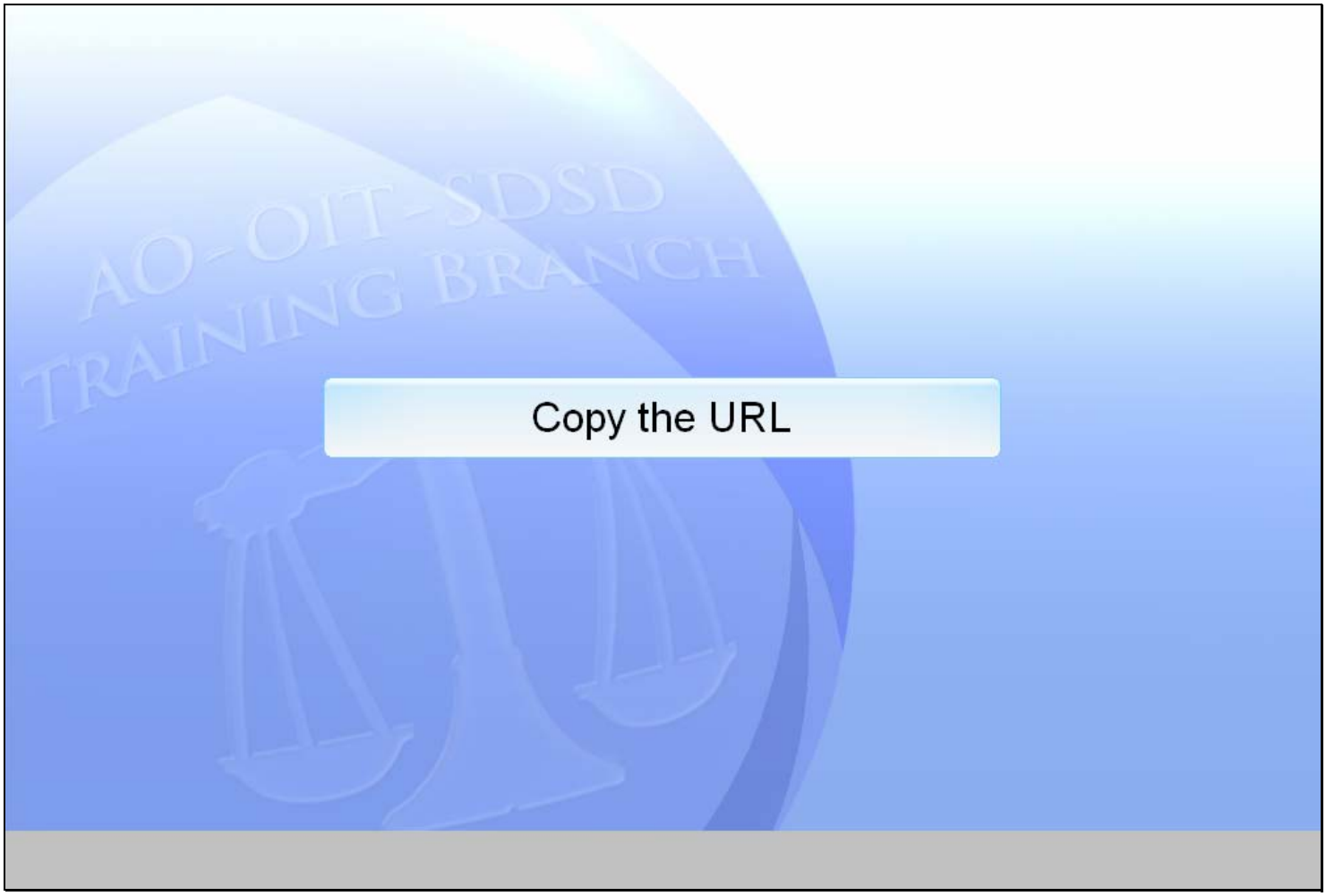
Slide 9 - Slide 9

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 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 WordPerfect.

Slide 10 - Copy the URL



Slide notes

(Note: This is a transition slide.)

Slide 11 - Slide 11

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)

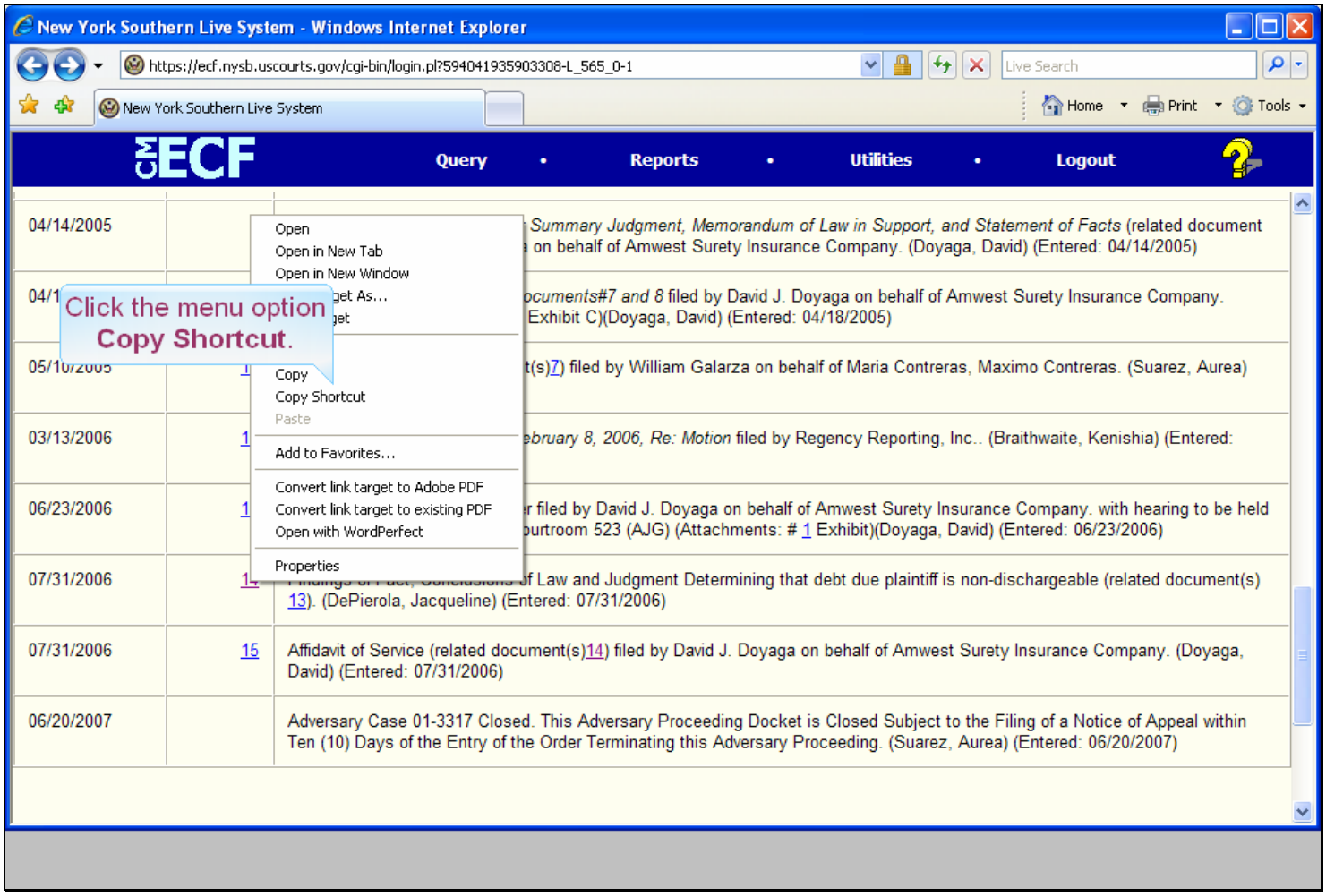
Slide notes

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 12

Slide notes

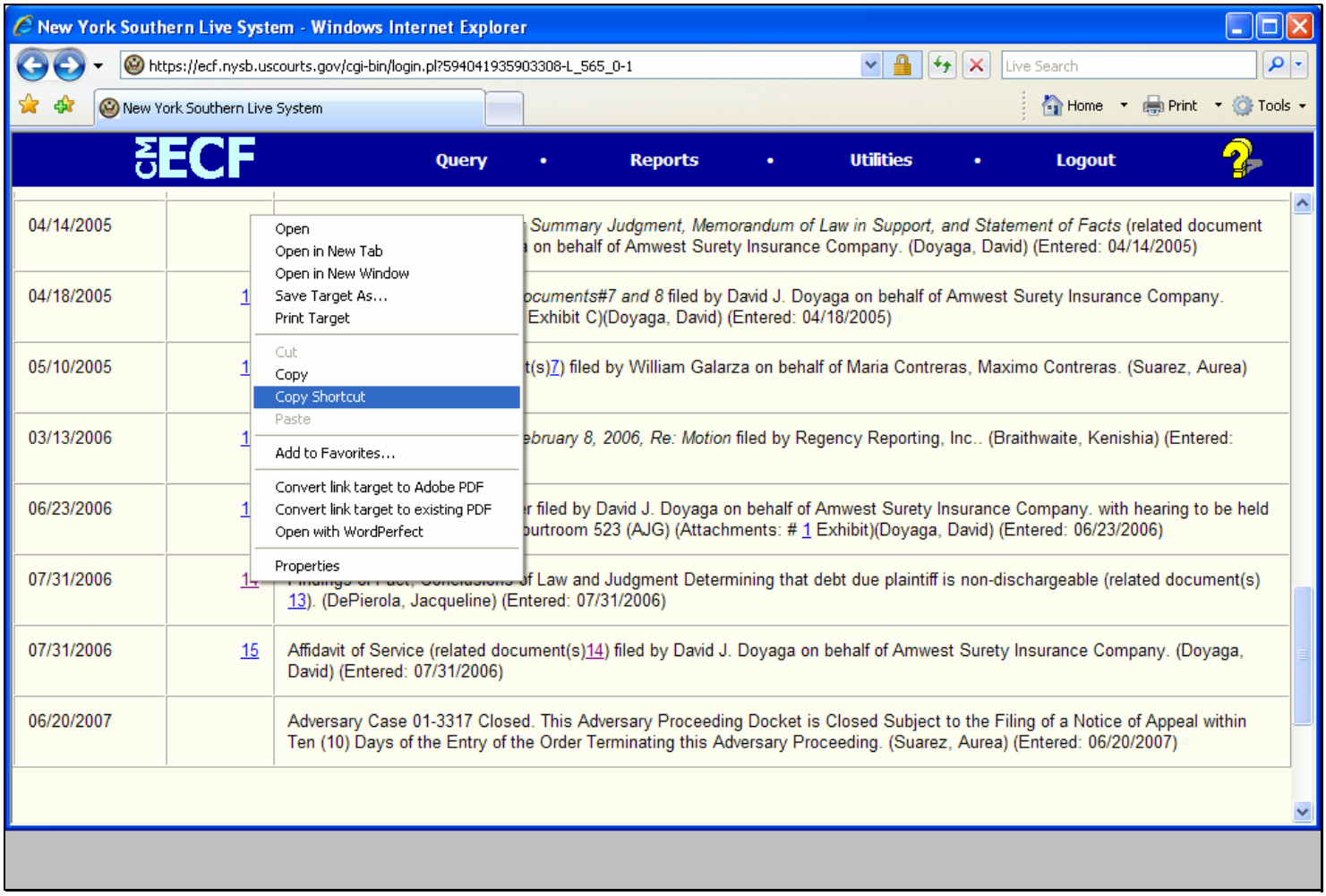
Slide 13 - Slide 13



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 14



Slide notes

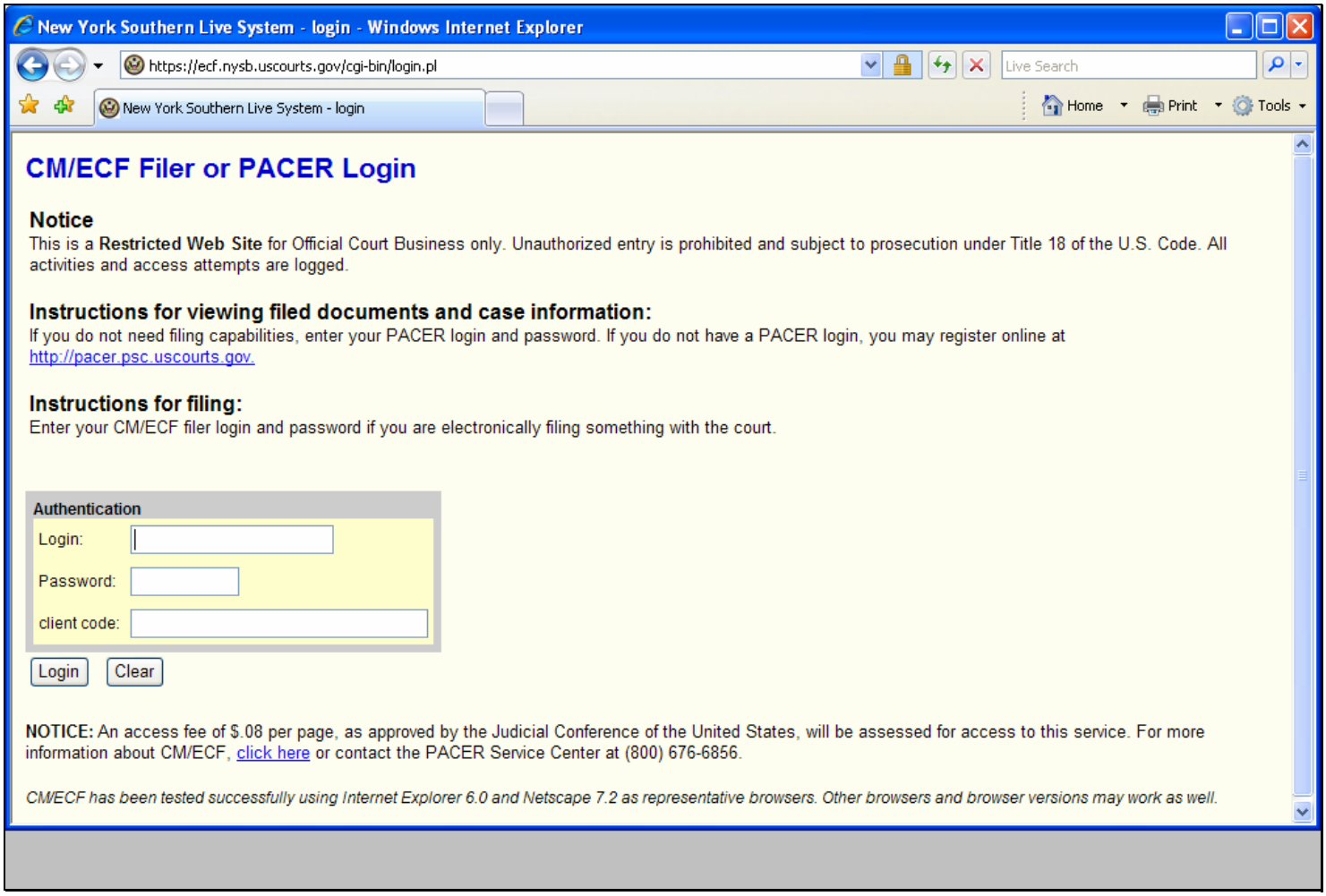
(Note: This is a transition slide.)

Slide 15 - 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.

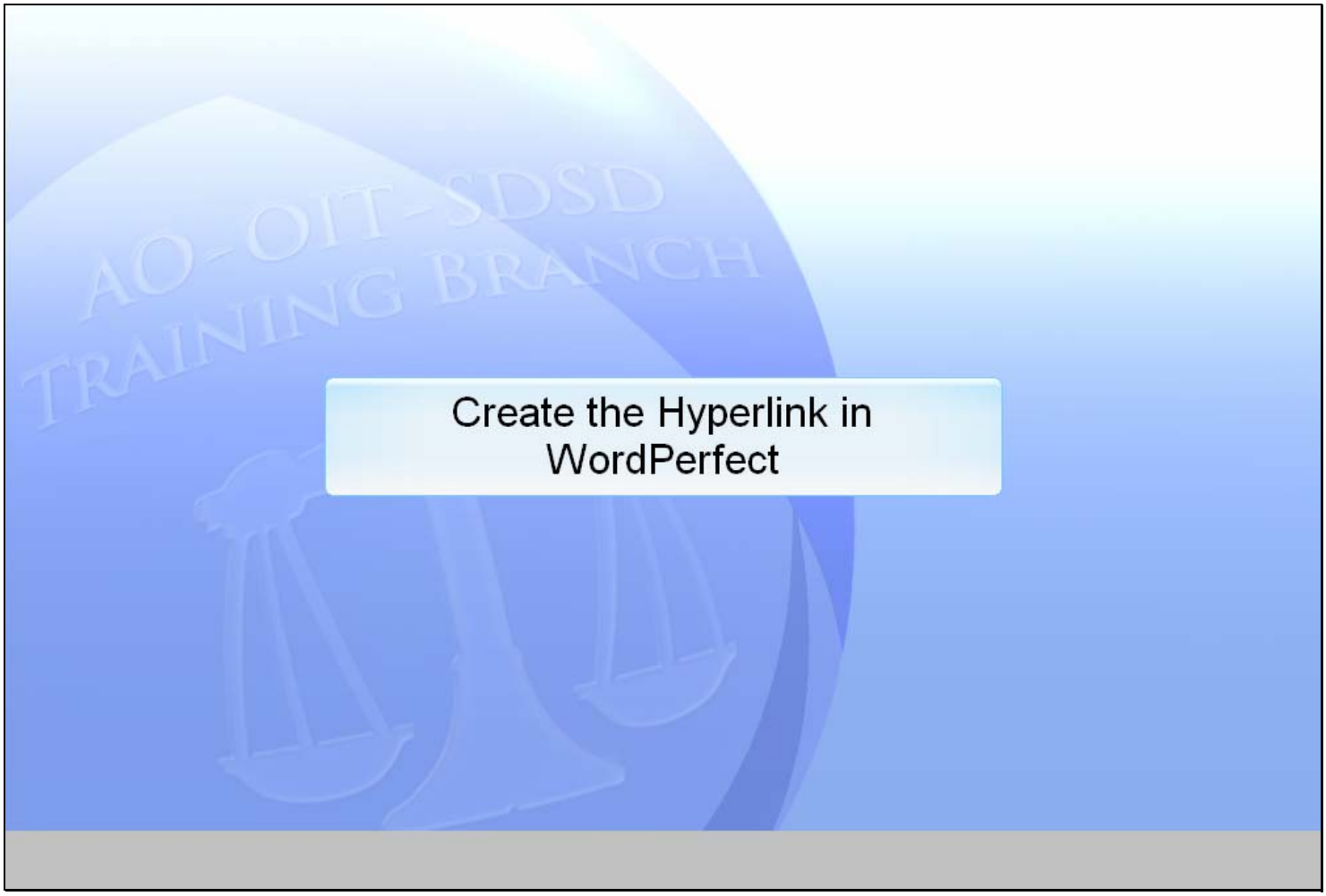
Slide 16 - Slide 16



Slide notes

(Note: This is a transition slide.)

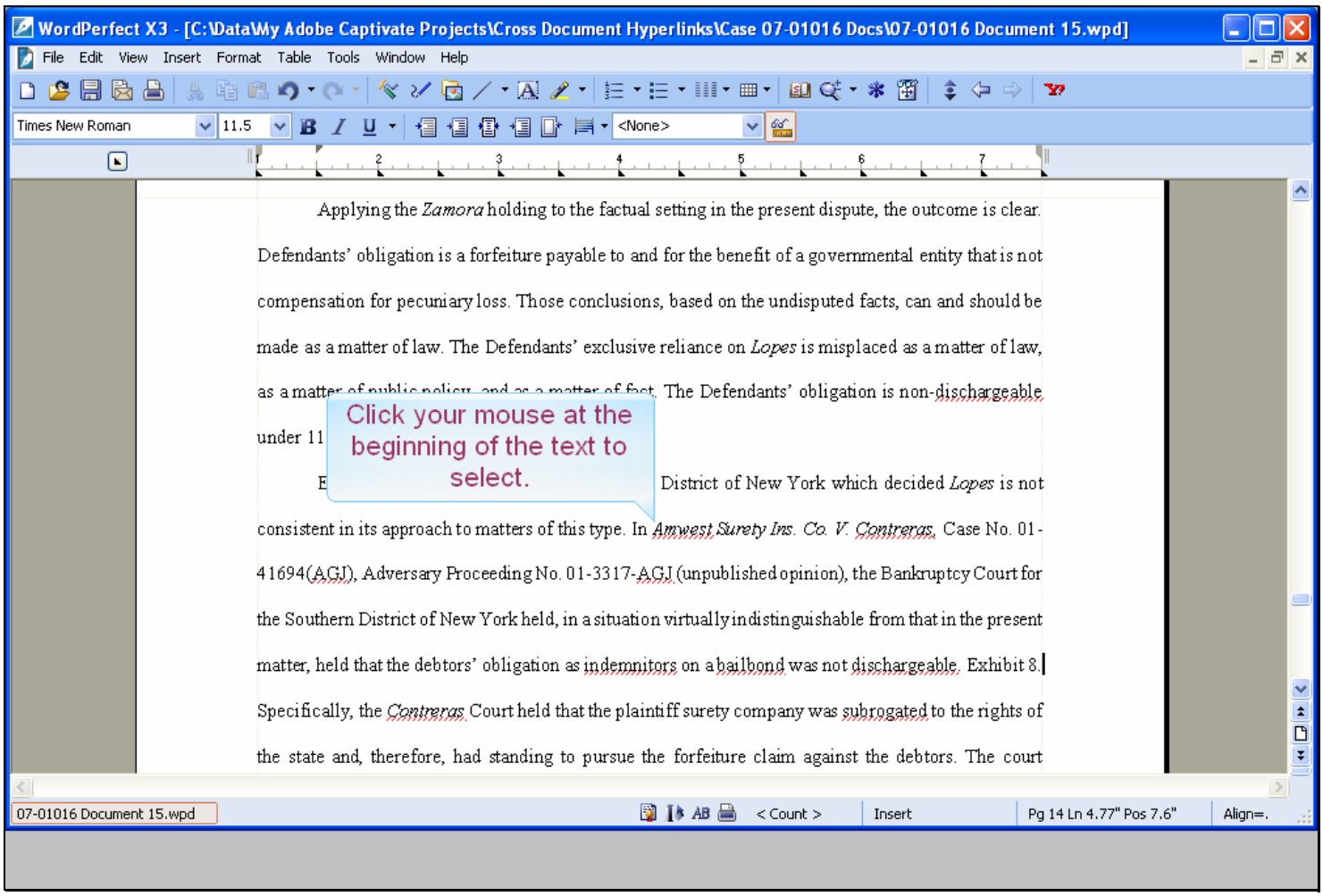
Slide 17 - Create the Hyperlink in WordPerfect



Slide notes

(Note: This is a transition slide.)

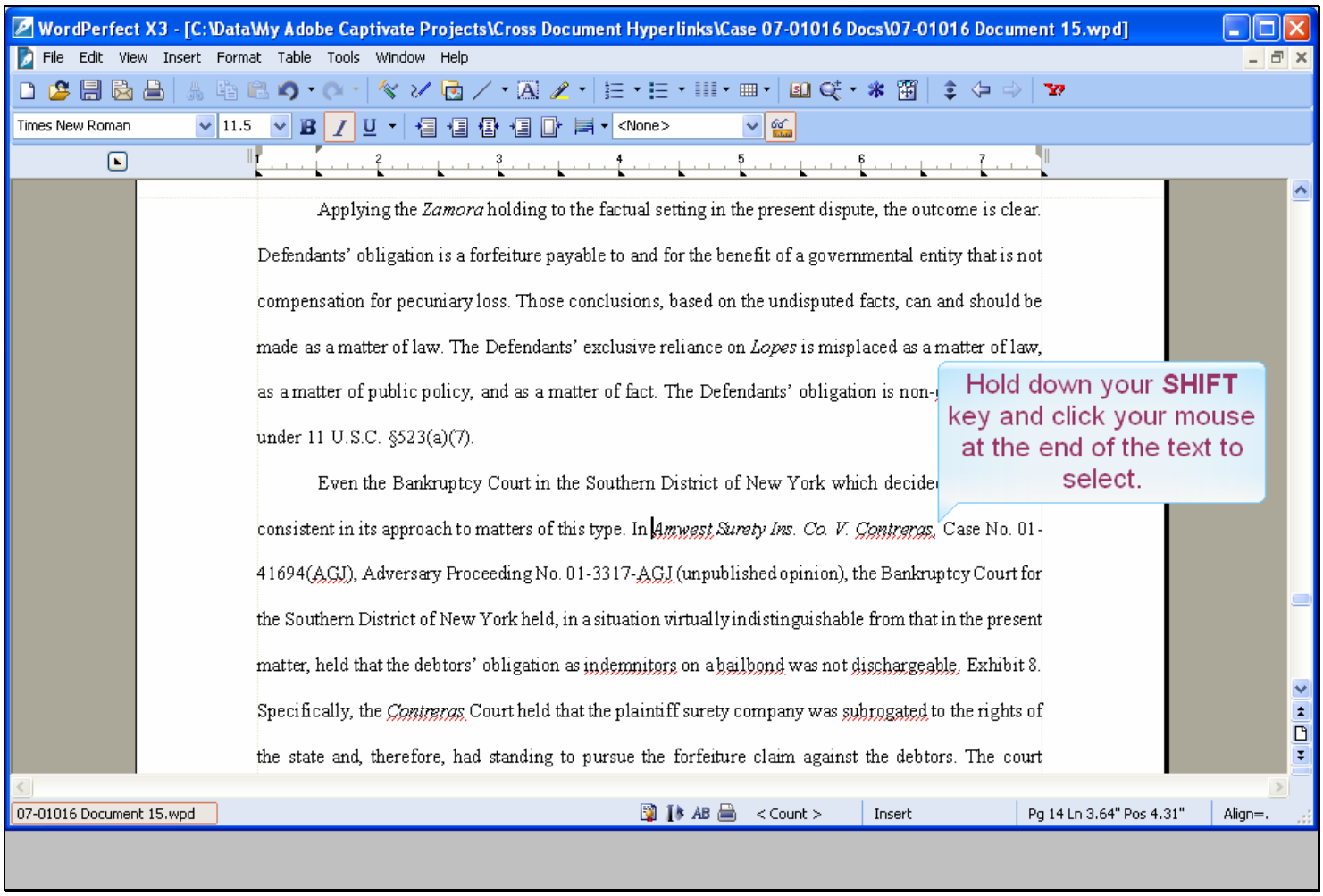
Slide 18 - Slide 18



Slide notes

Now we've switched over to WordPerfect and are editing our brief. In this lesson we're using WordPerfect version X3, but any WordPerfect Version 11 or higher will work in a similar way. 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 first must select the text that will become the hyperlink. There are several ways to select text in WordPerfect. 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.

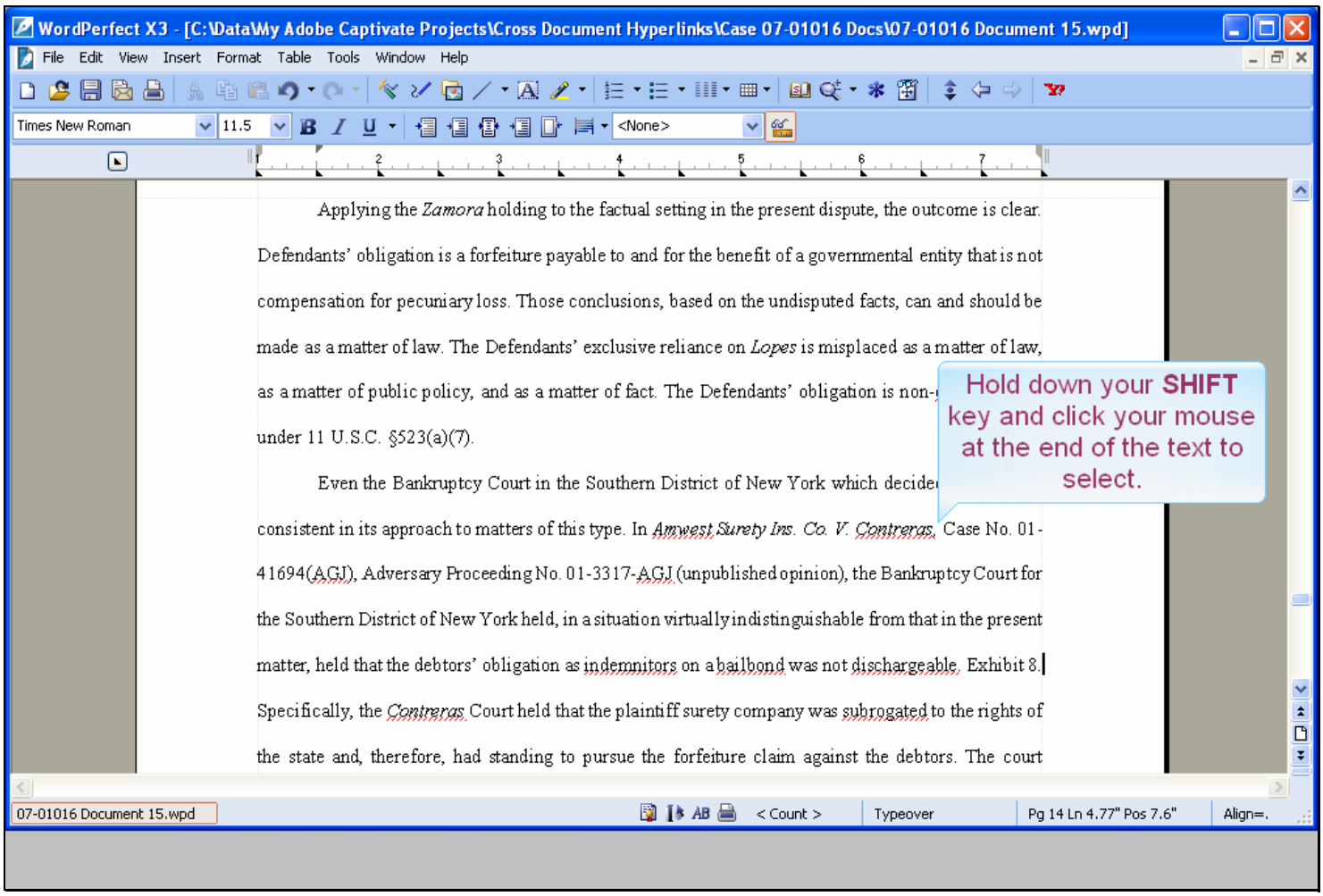
Slide 19 - Slide 19



Slide notes

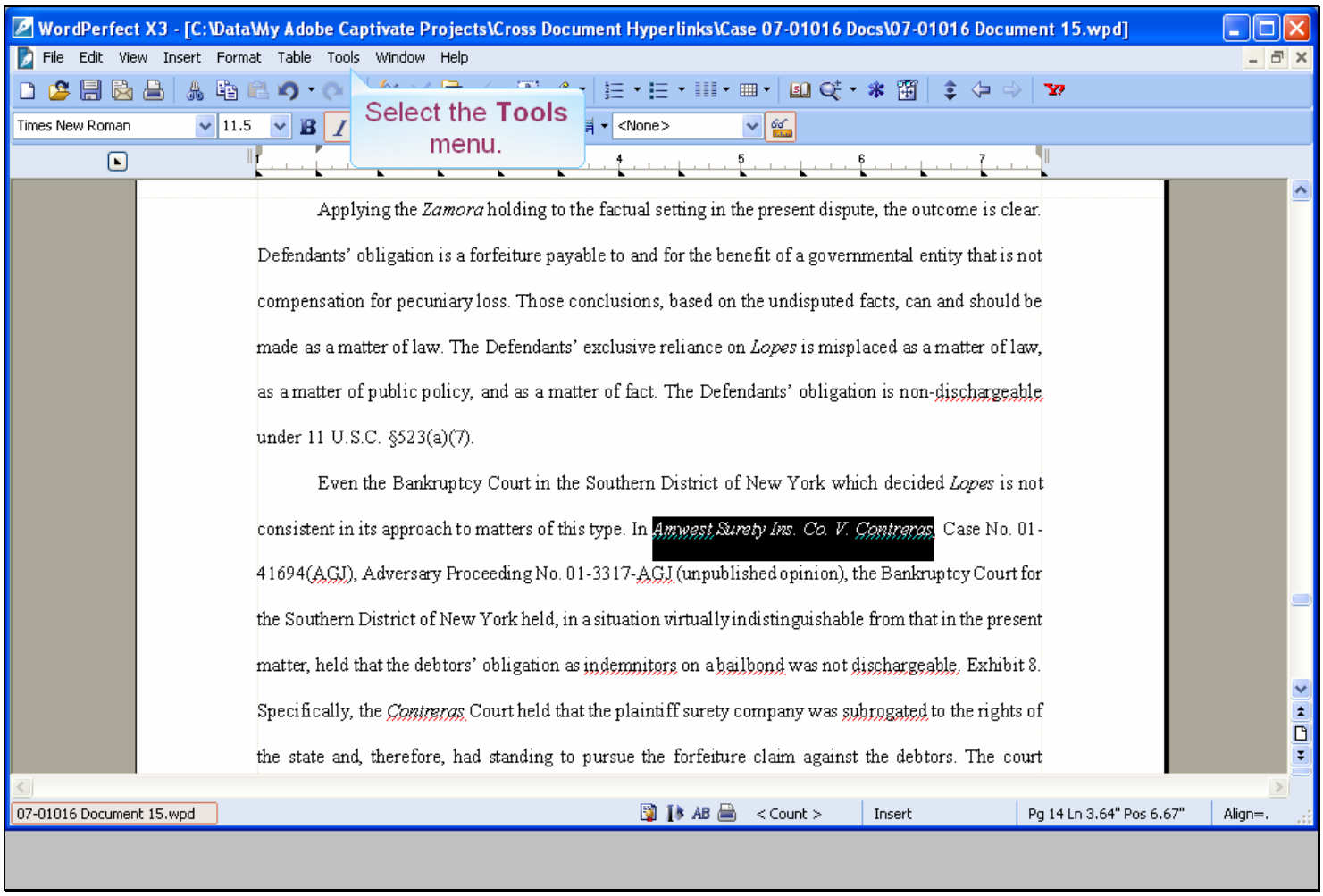
Now hold down the SHIFT key and click once at the end of the desired text.

Slide 20 - Slide 20



Slide notes

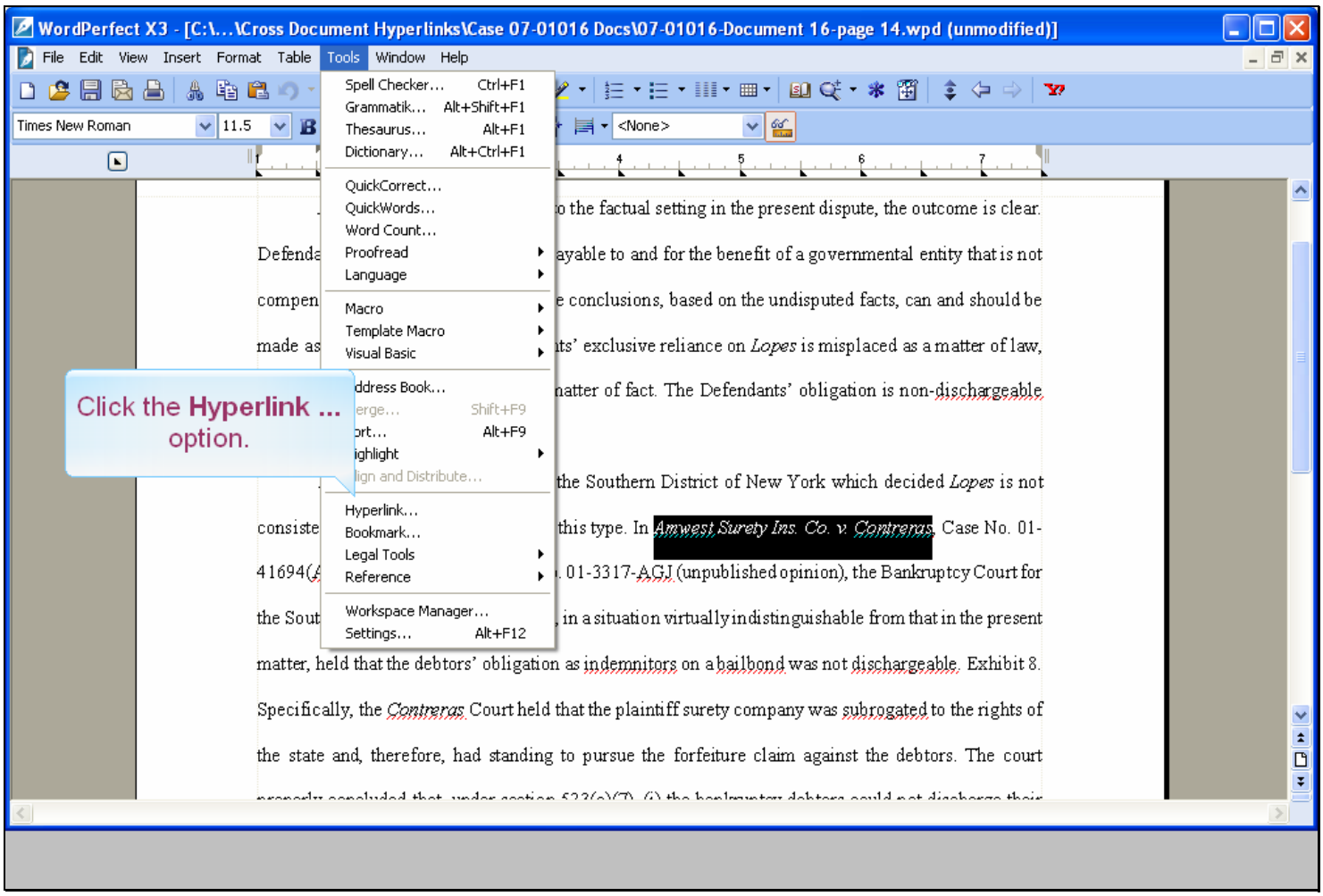
Slide 21 - Slide 21



Slide notes

WordPerfect now selects the text. To create the hyperlink for the selected text, click the Tools menu item.

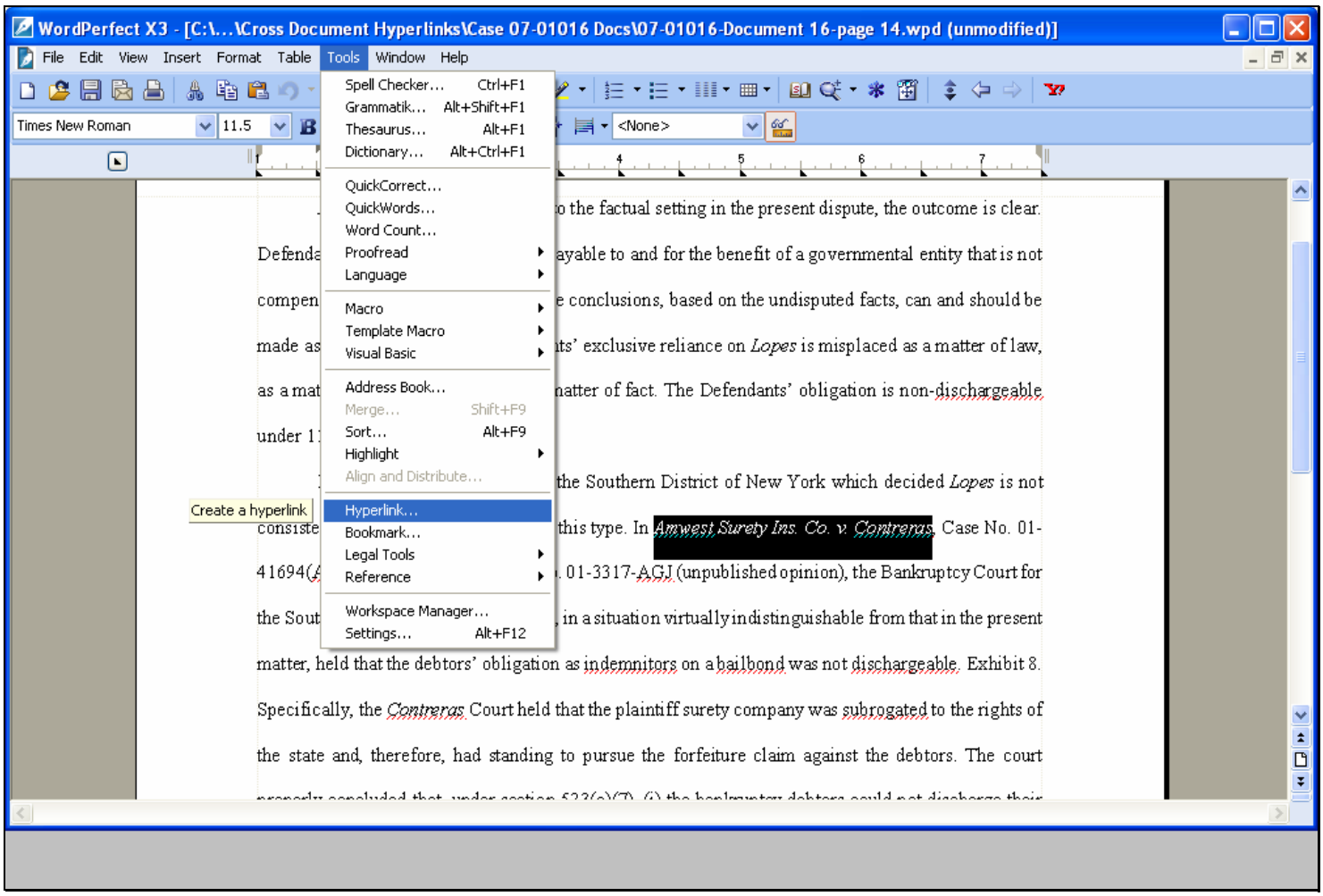
Slide 22 - Slide 22



Slide notes

From the drop-down menu, select Hyperlink ...

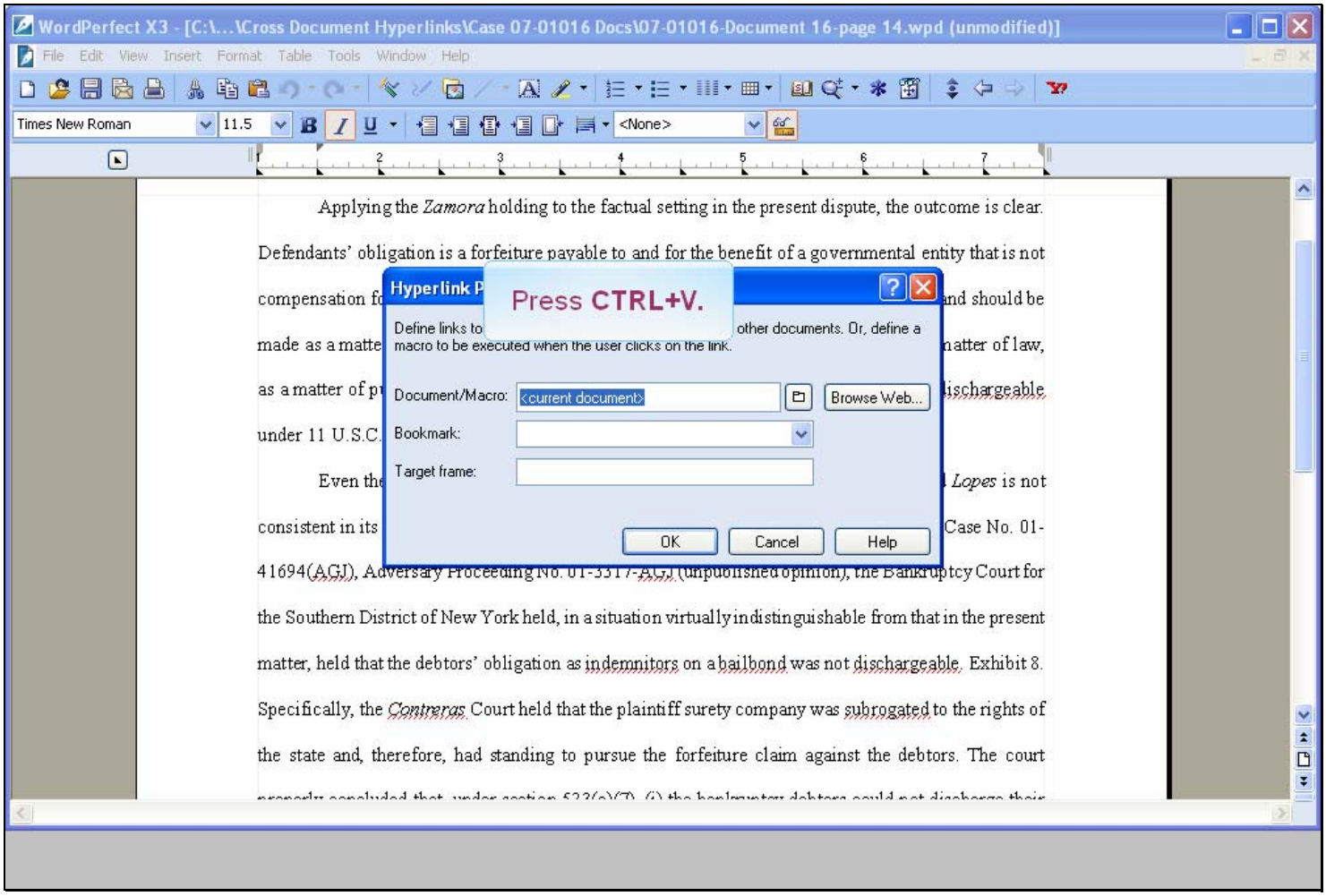
Slide 23 - Slide 23



Slide notes

(Note: This is a transition slide.)

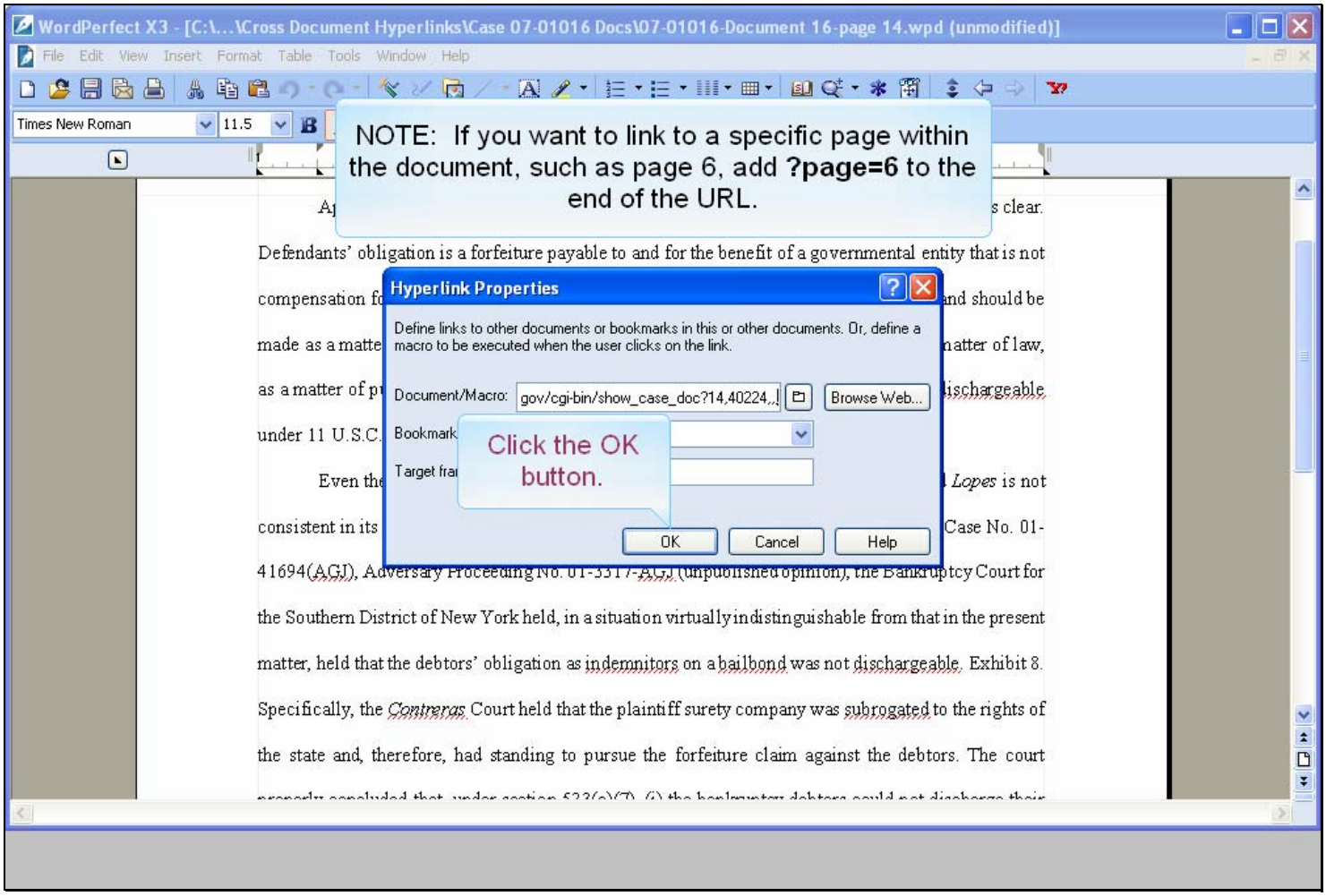
Slide 24 - Slide 24



Slide notes

A Hyperlink Properties dialog box opens. We're going to paste the URL that Windows copied to the clipboard earlier into the Document/Macro field. Like selecting text, there are several ways to paste the clipboard contents. We'll use the keyboard shortcut keystroke of CTRL+V. The URL will be pasted into the Document/Macro field since it's currently highlighted. Hold down your control key and type the letter V.

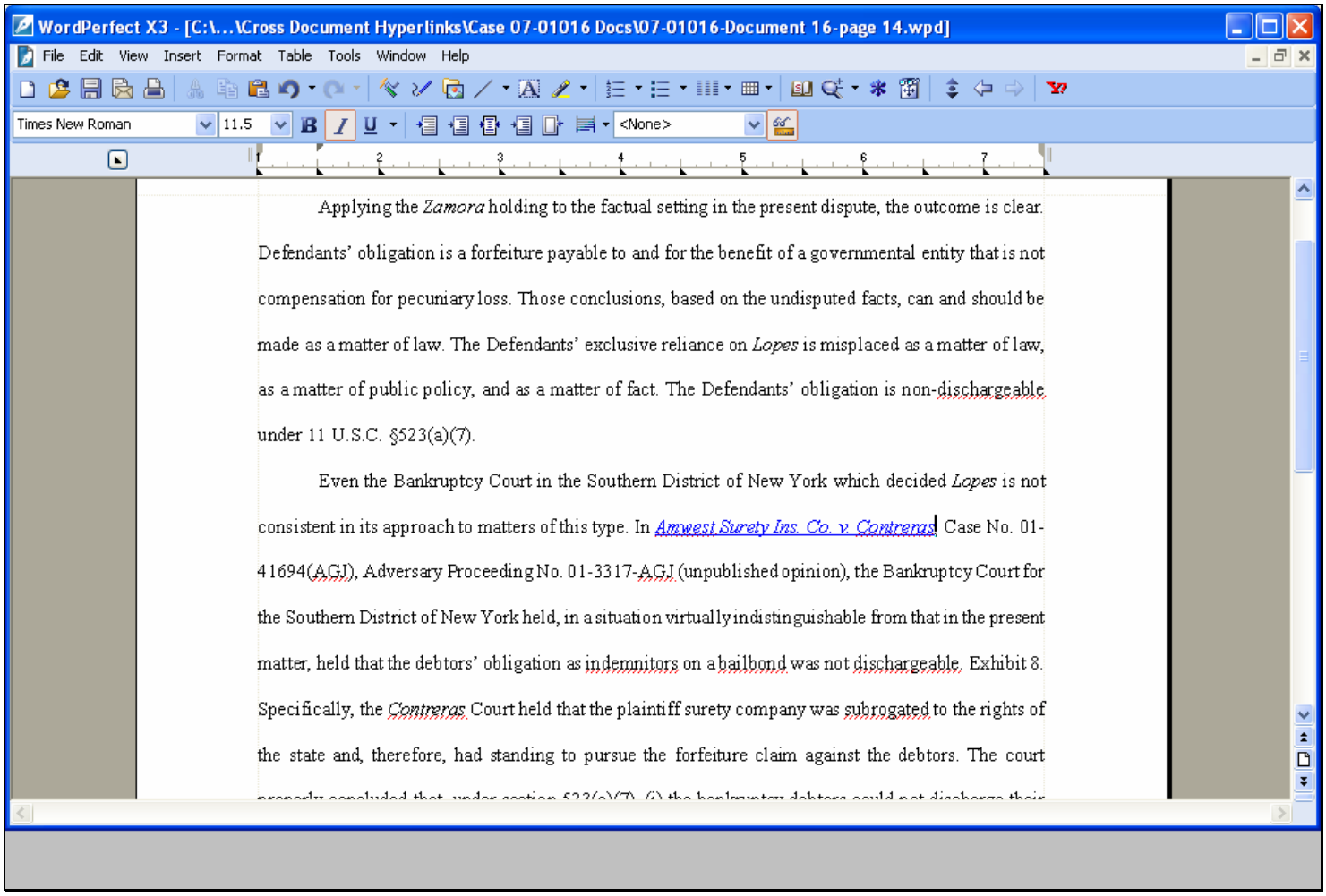
Slide 25 - Slide 25



Slide notes

And the URL is pasted into the Document/Macro field. The URL we just pasted is to the first page of document number 14 in the adversary proceeding from the New York Southern case. It is possible to create a hyperlink to a specific page in the document instead of the first page. For example, if you wanted to refer to page 6 of document number 14, you would take an extra step here. You would add "?page=6" to the end of the URL for the page number. We'll leave it at the first page in this lesson. Click the OK button.

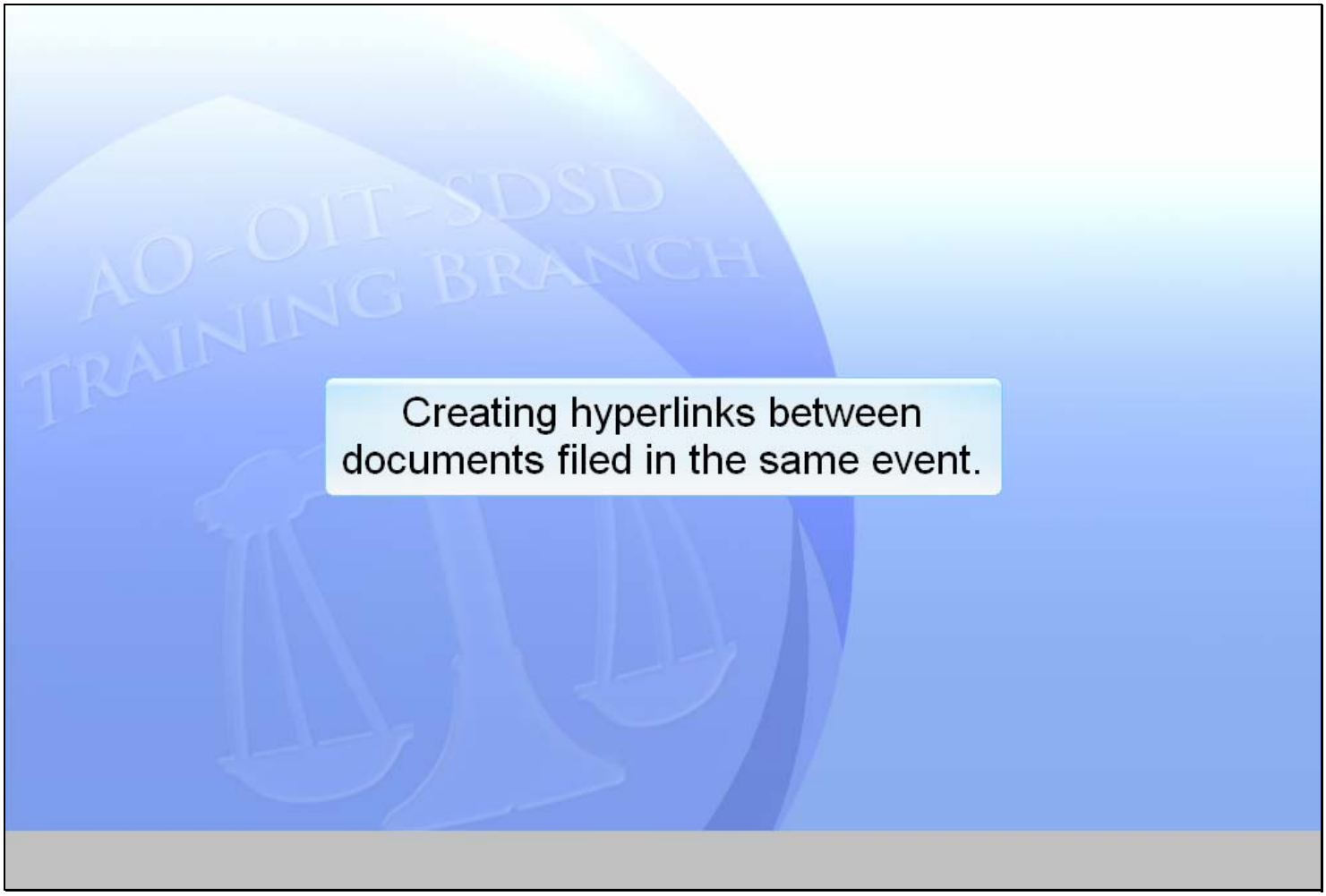
Slide 26 - Slide 26



Slide notes

WordPerfect has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue.

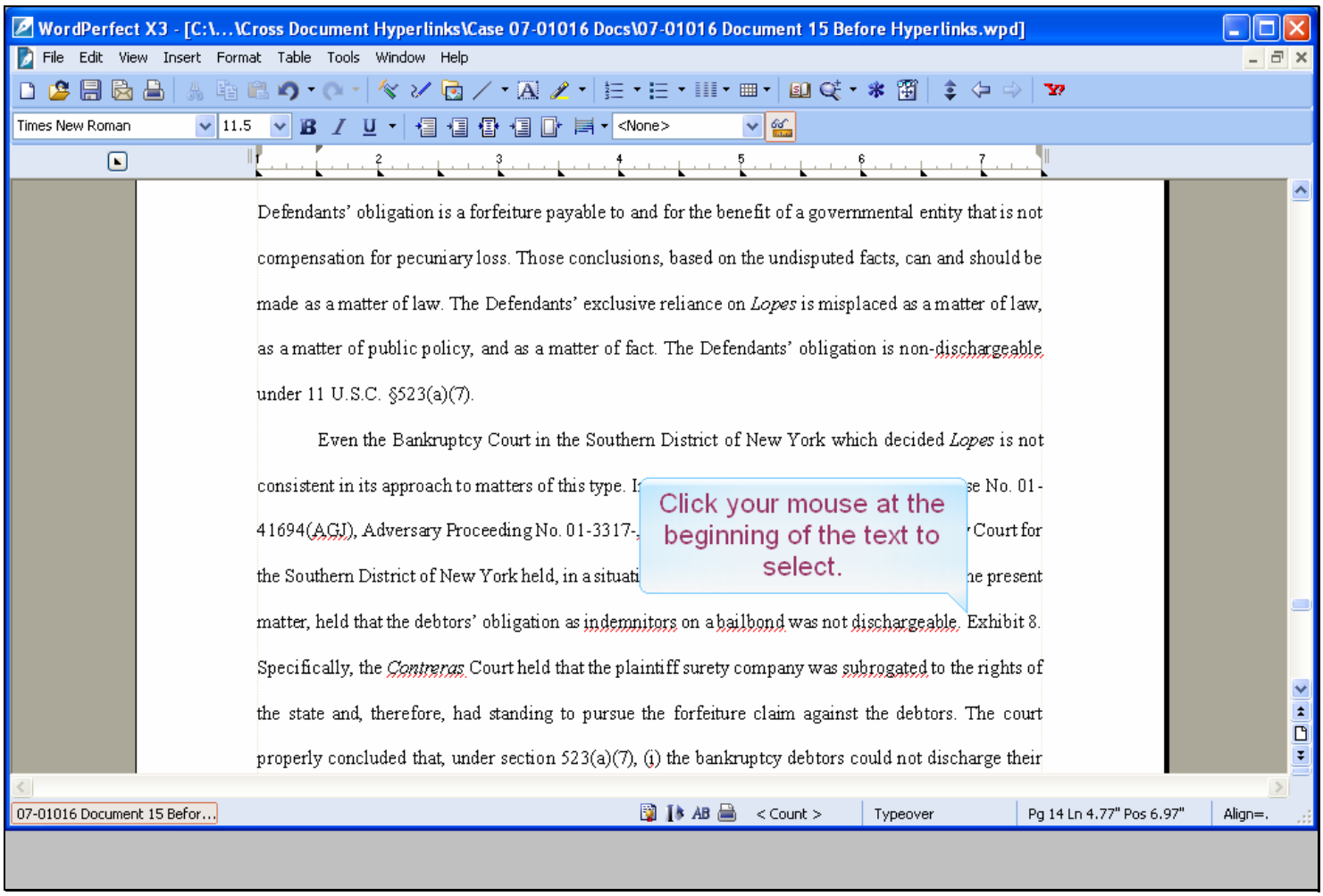
Slide 27 - Hyperlinks bertwwn documents - same event.



Slide notes

Before we publish this WordPerfect 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 the 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.

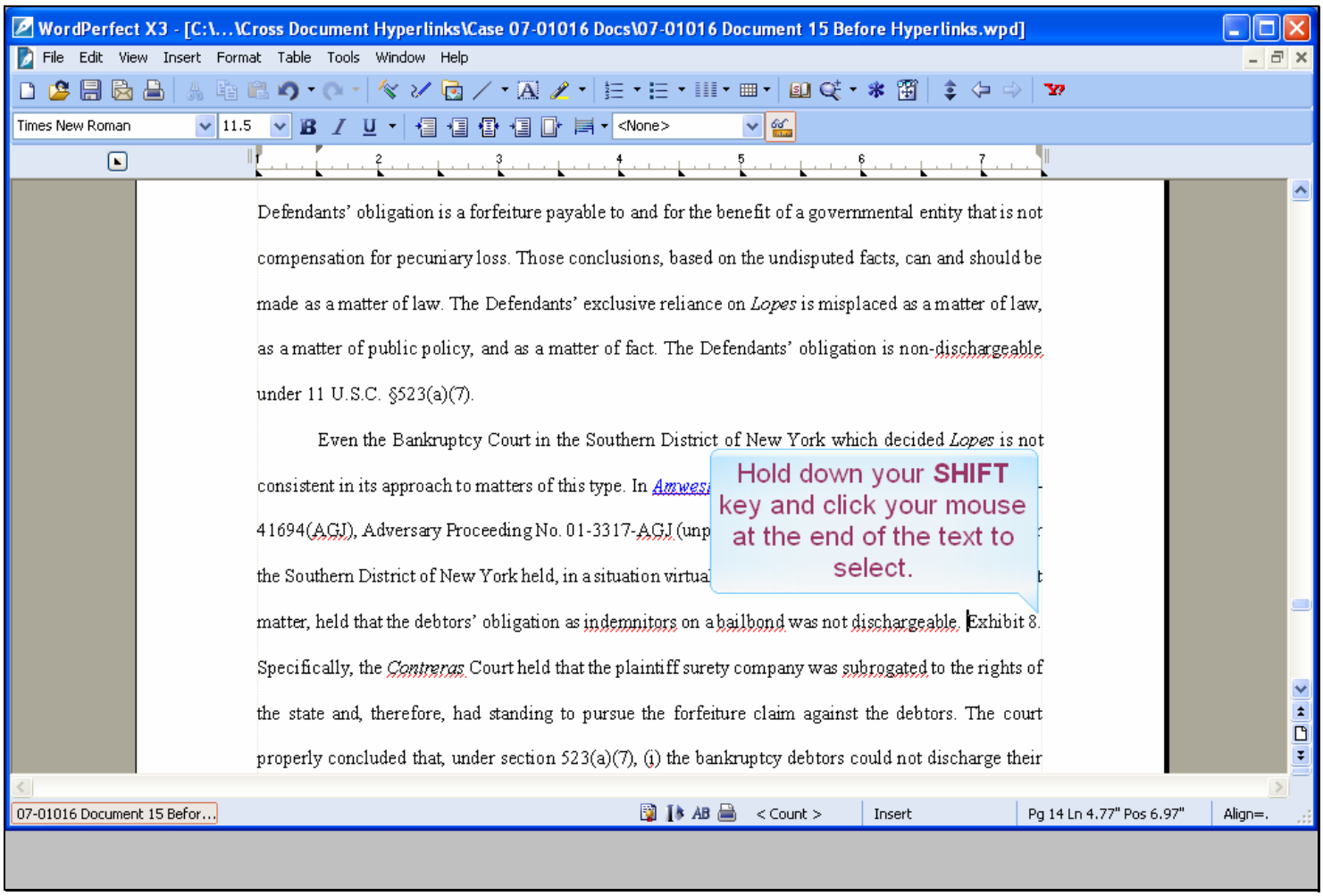
Slide 28 - Slide 28



Slide notes

We are once again editing our brief in WordPerfect. 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.

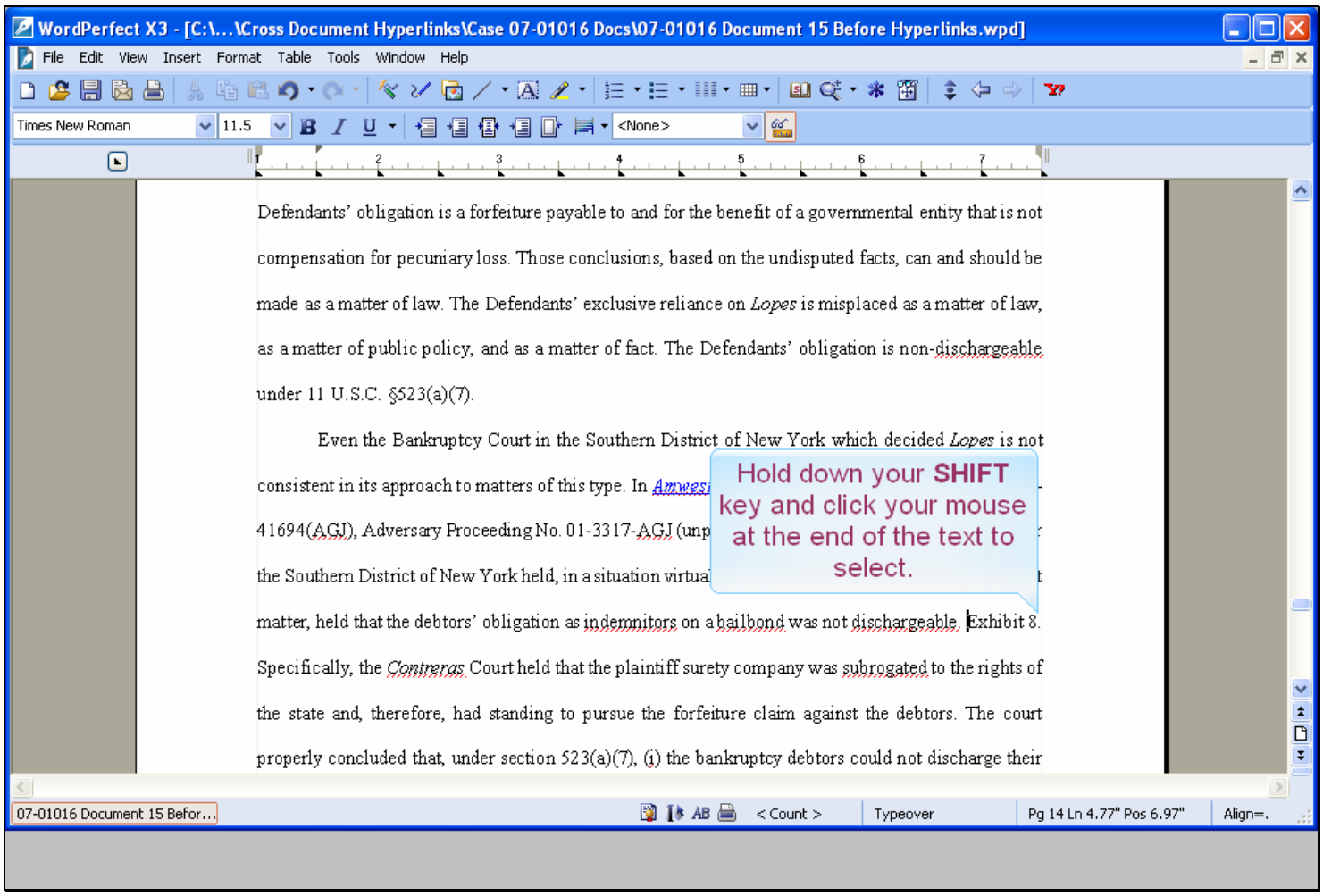
Slide 29 - Slide 29



Slide notes

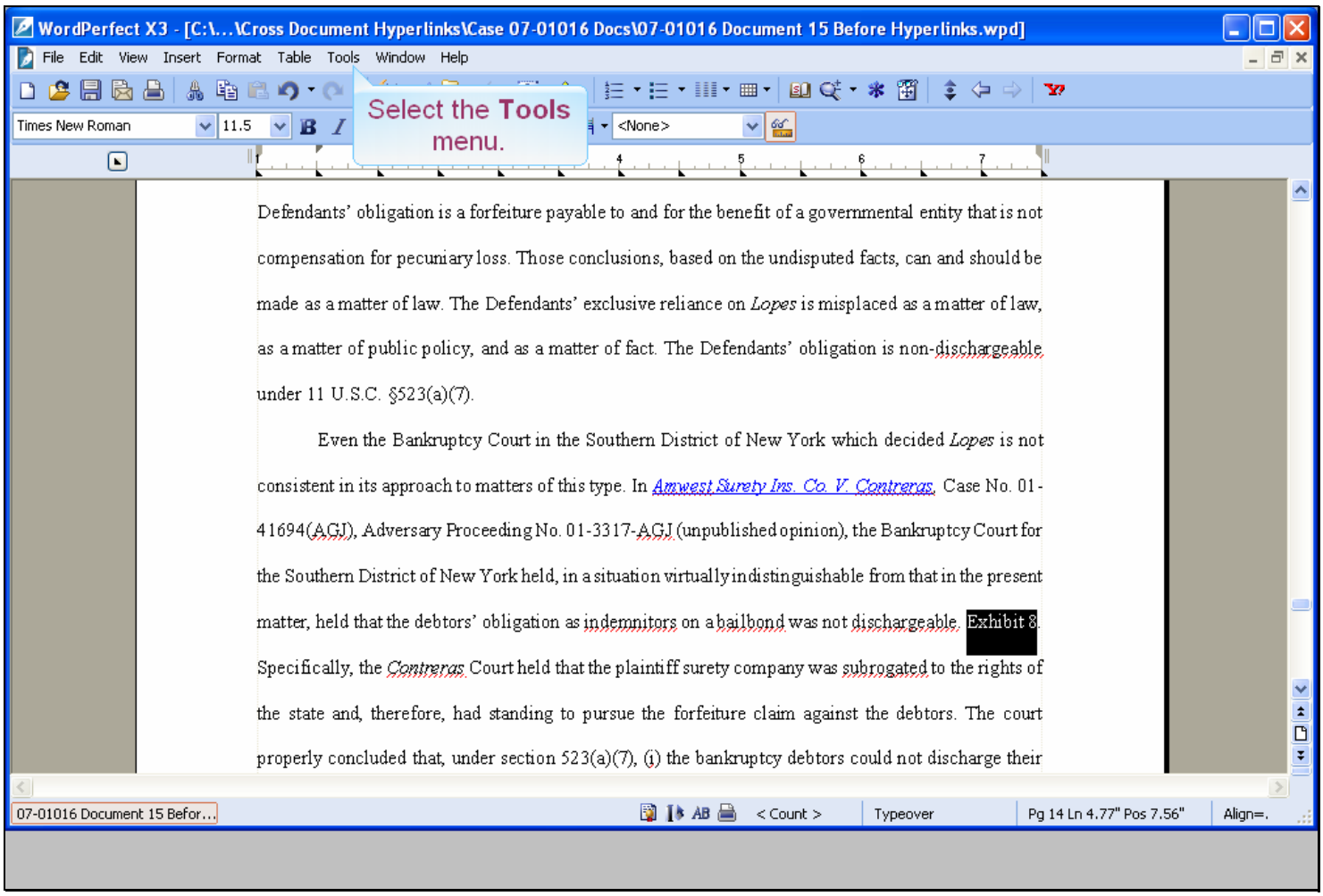
Now hold down the SHIFT key and click once at the end of the desired text.

Slide 30 - Slide 30



Slide notes

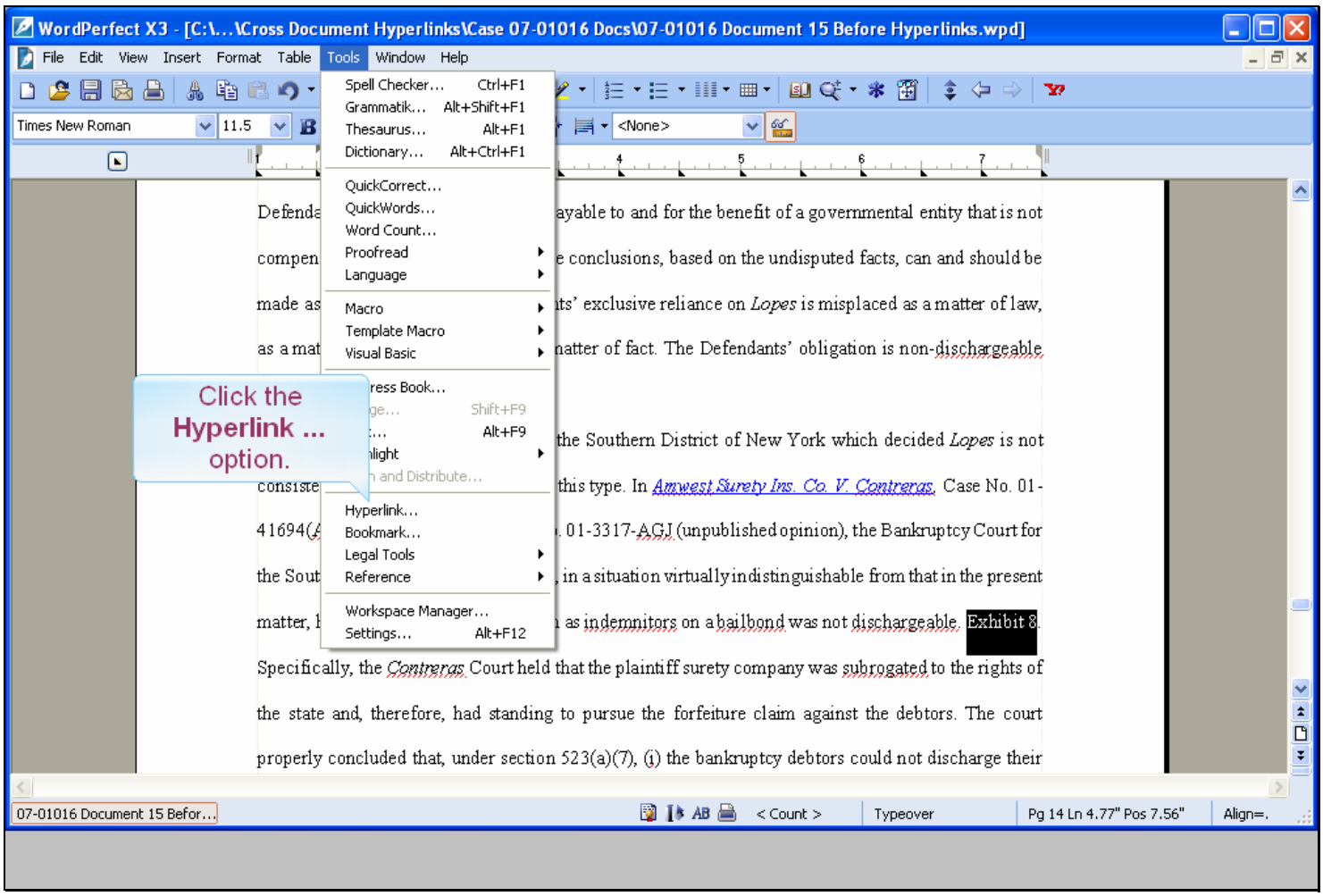
Slide 31 - Slide 31



Slide notes

WordPerfect now selects the text. Next, click the Tools menu item.

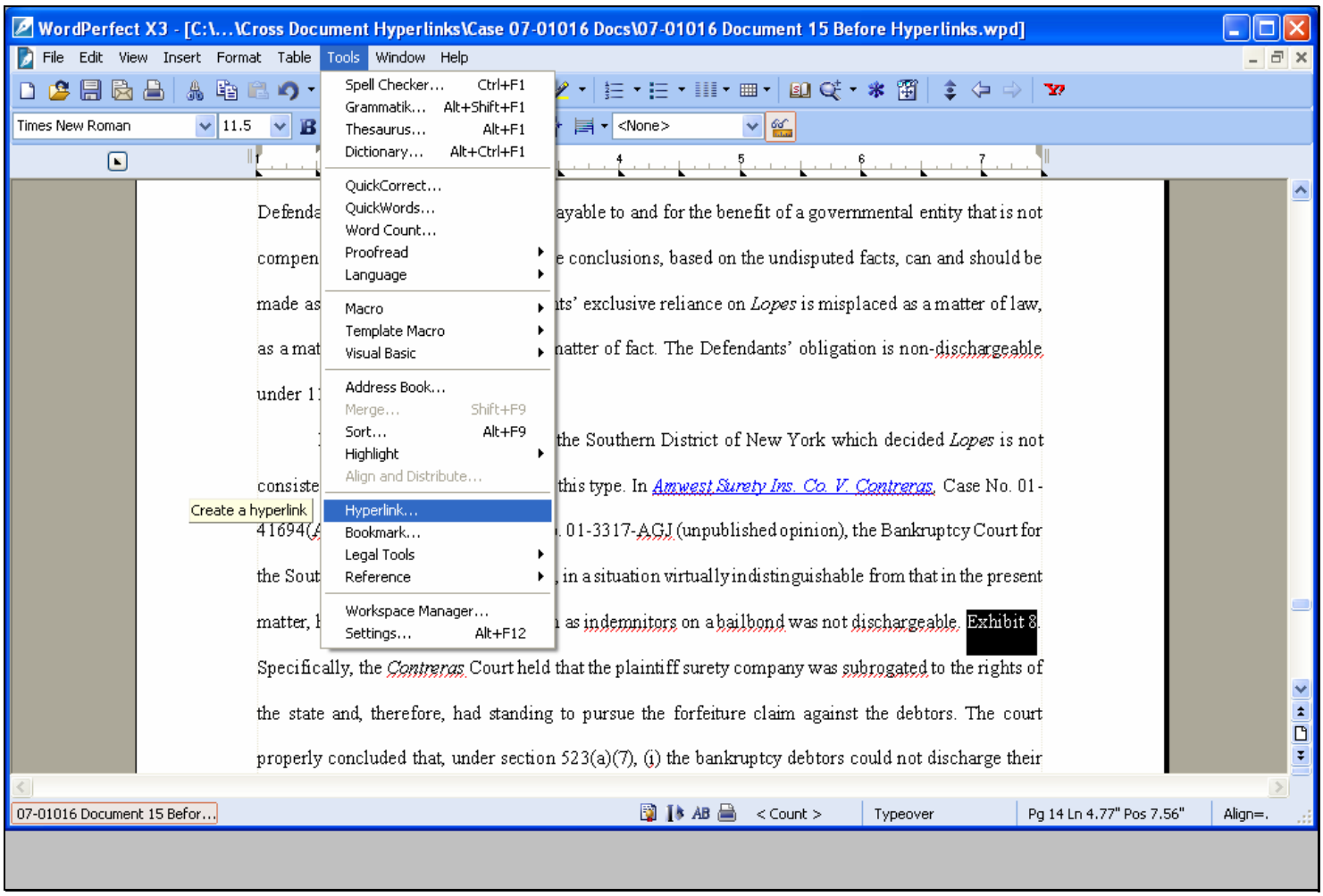
Slide 32 - Slide 32



Slide notes

From the drop-down menu, select Hyperlink ...

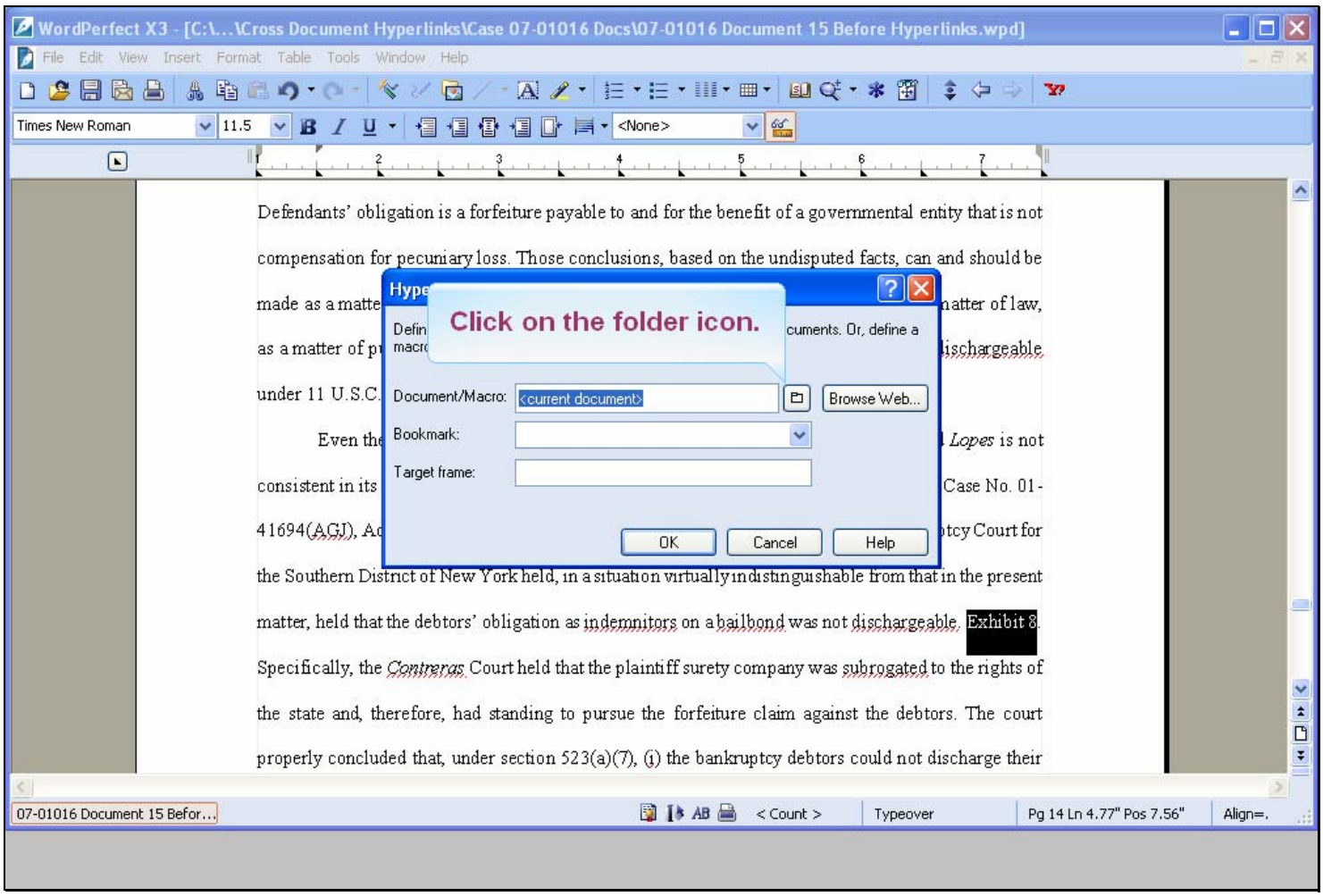
Slide 33 - Slide 33



Slide notes

(Note: This is a transition slide.)

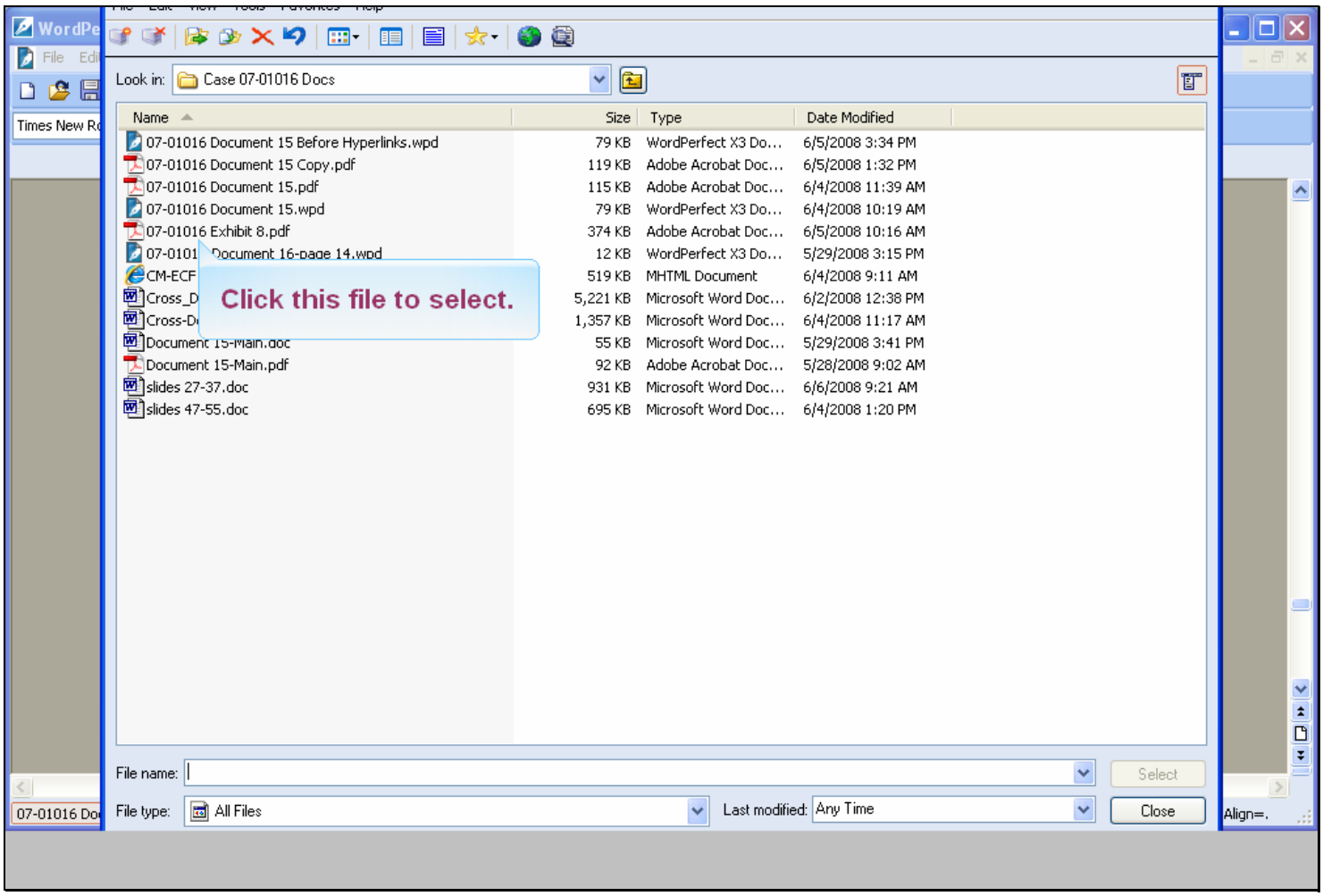
Slide 34 - Slide 34



Slide notes

A WordPerfect Hyperlink Properties dialog box opens. Since the PDF document we want to link to is located on our hard drive, we will select the folder icon. Click the folder icon.

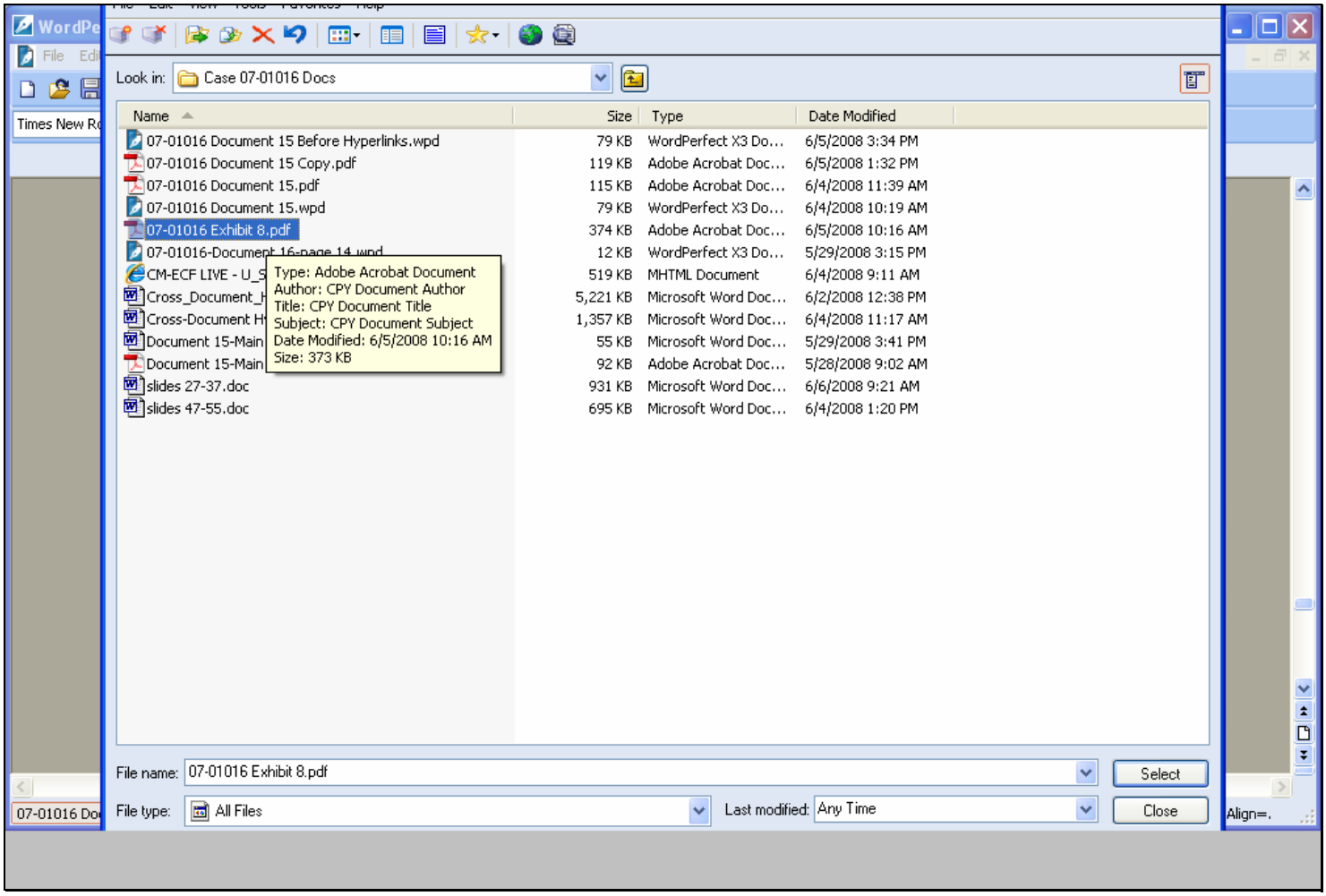
Slide 35 - Slide 35



Slide notes

We have navigated to the location of our PDF document which is 07-01016 Exhibit 8.pdf. Click on that document.

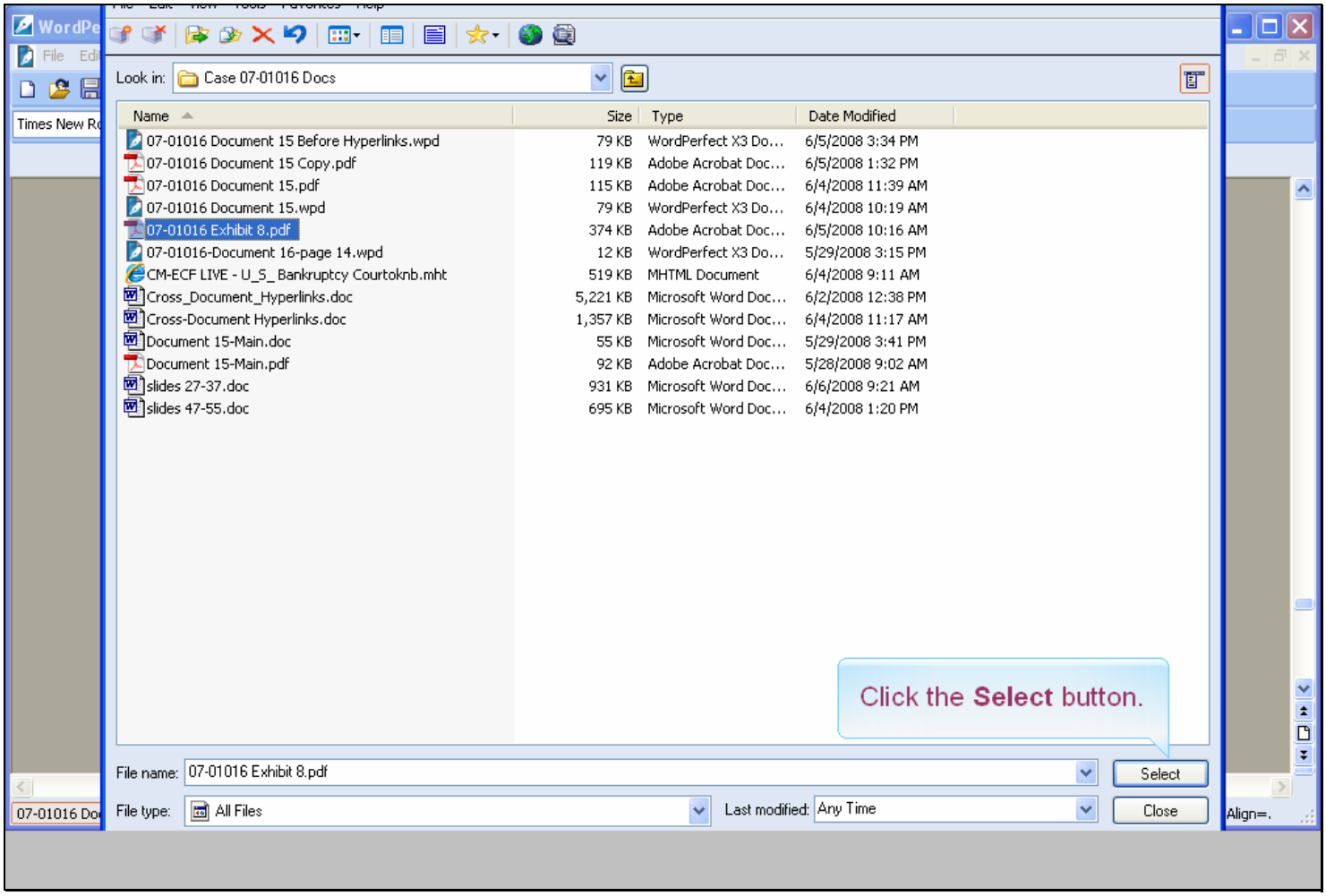
Slide 36 - Slide 36



Slide notes

(Note: This is a transition slide.)

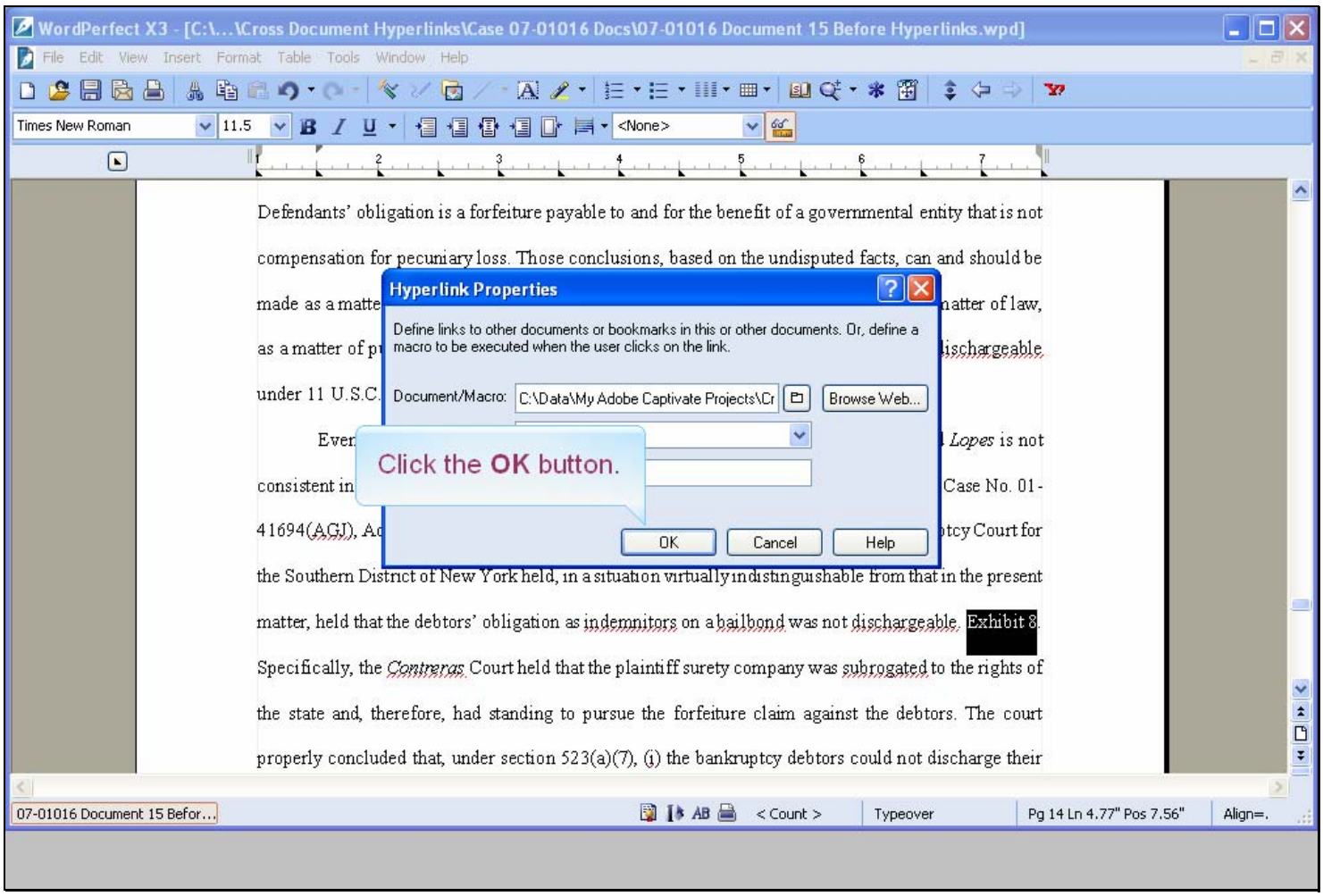
Slide 37 - Slide 37



Slide notes

Now that we have selected the correct file, click on the Select button.

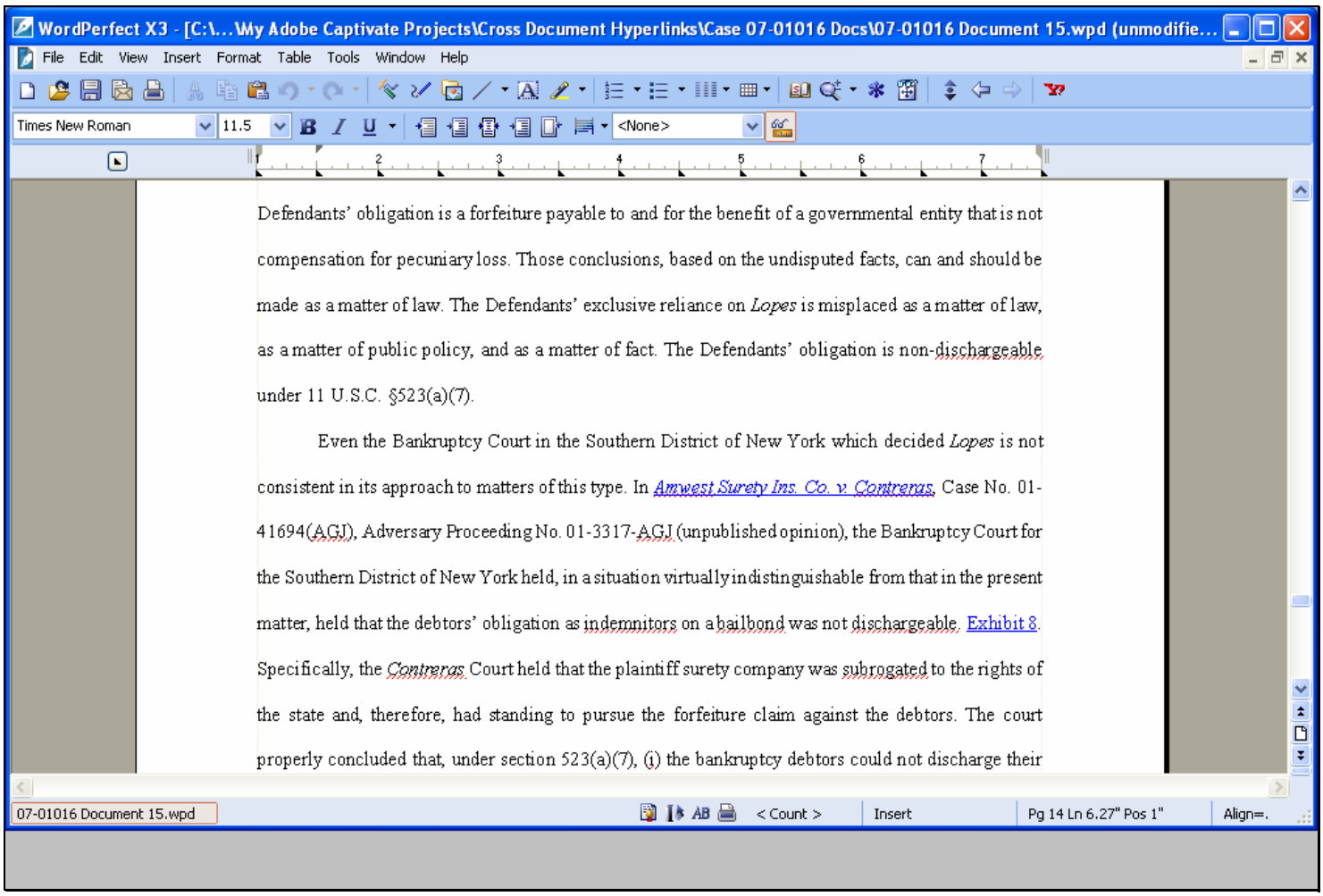
Slide 38 - Slide 38



Slide notes

The Hyperlink Properties dialog box now shows the path to the PDF document in the Document/Macro field. Click on the OK button.

Slide 39 - Slide 39



Slide notes

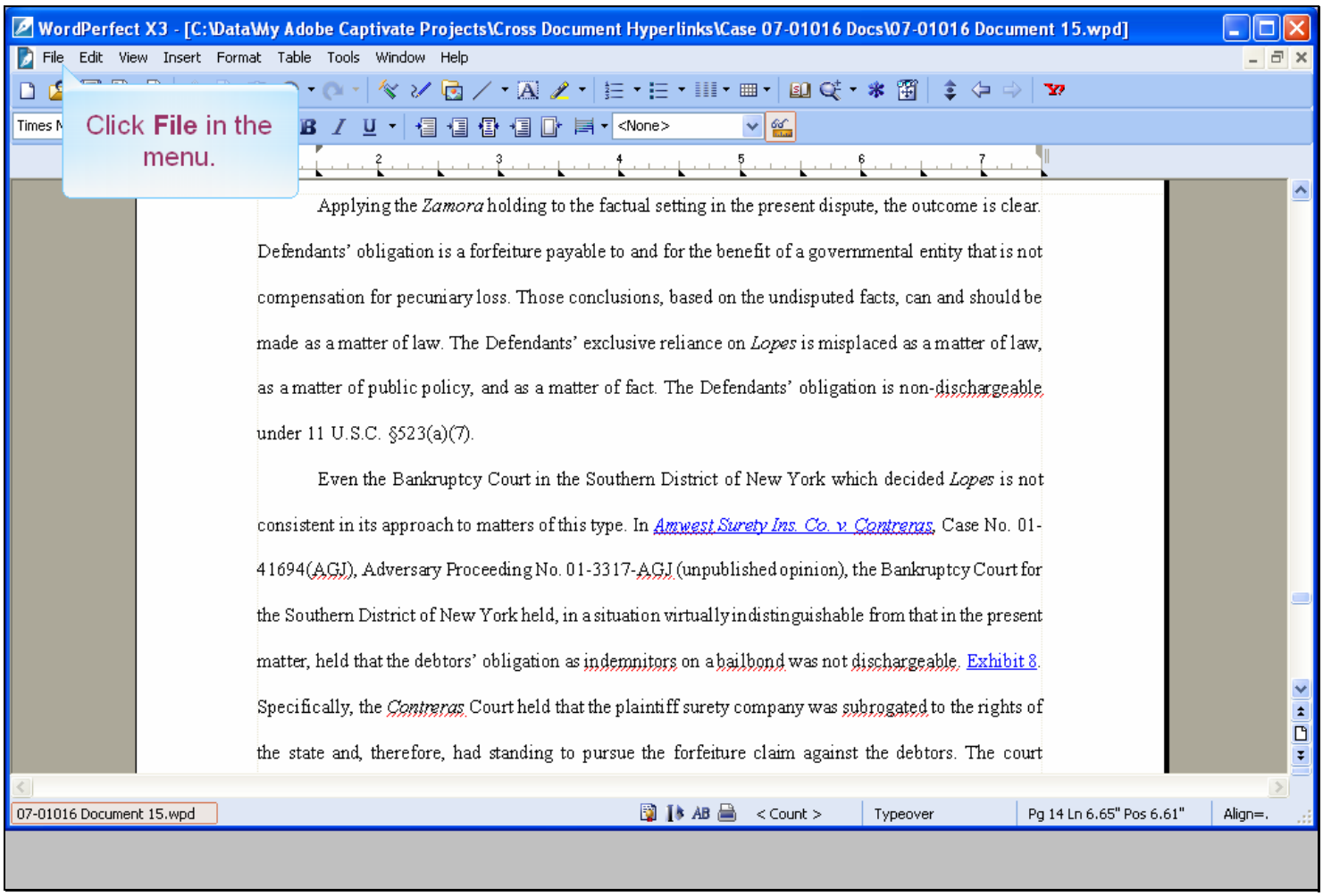
WordPerfect has now created a hyperlink for the text we had selected. Notice the text now appears underlined and is blue. We are now ready to publish our WordPerfect document to PDF.

Slide 40 - Publish to PDF

Slide notes

(Note: This is a transition slide.)

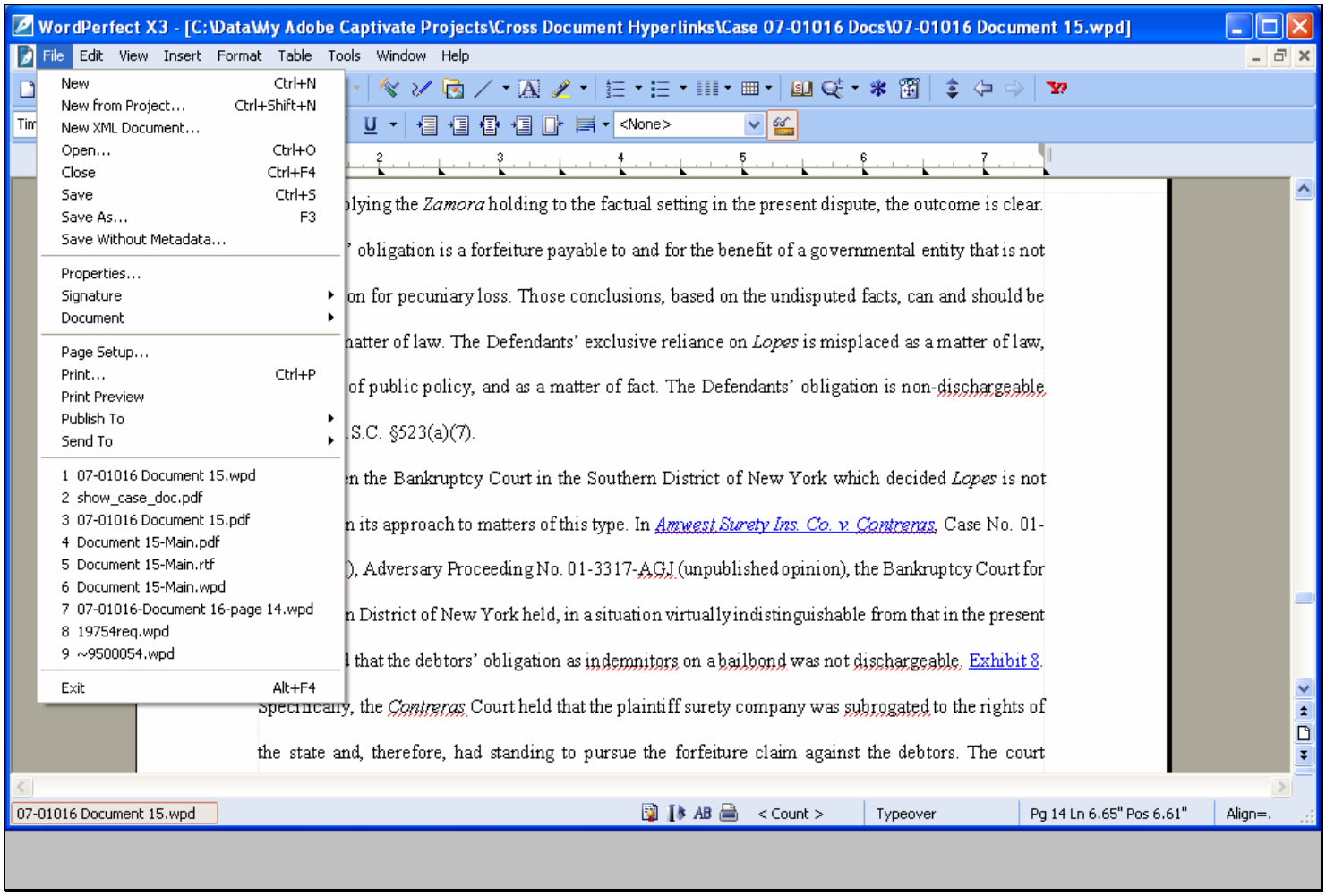
Slide 41 - Slide 41



Slide notes

The next step is to publish our brief to PDF format so we can file it with the Appellate Court. Do not PRINT a WordPerfect document to Adobe PDF Writer. You must use "Publish to PDF" if the document contains hyperlinks. To do so, click File in the menu.

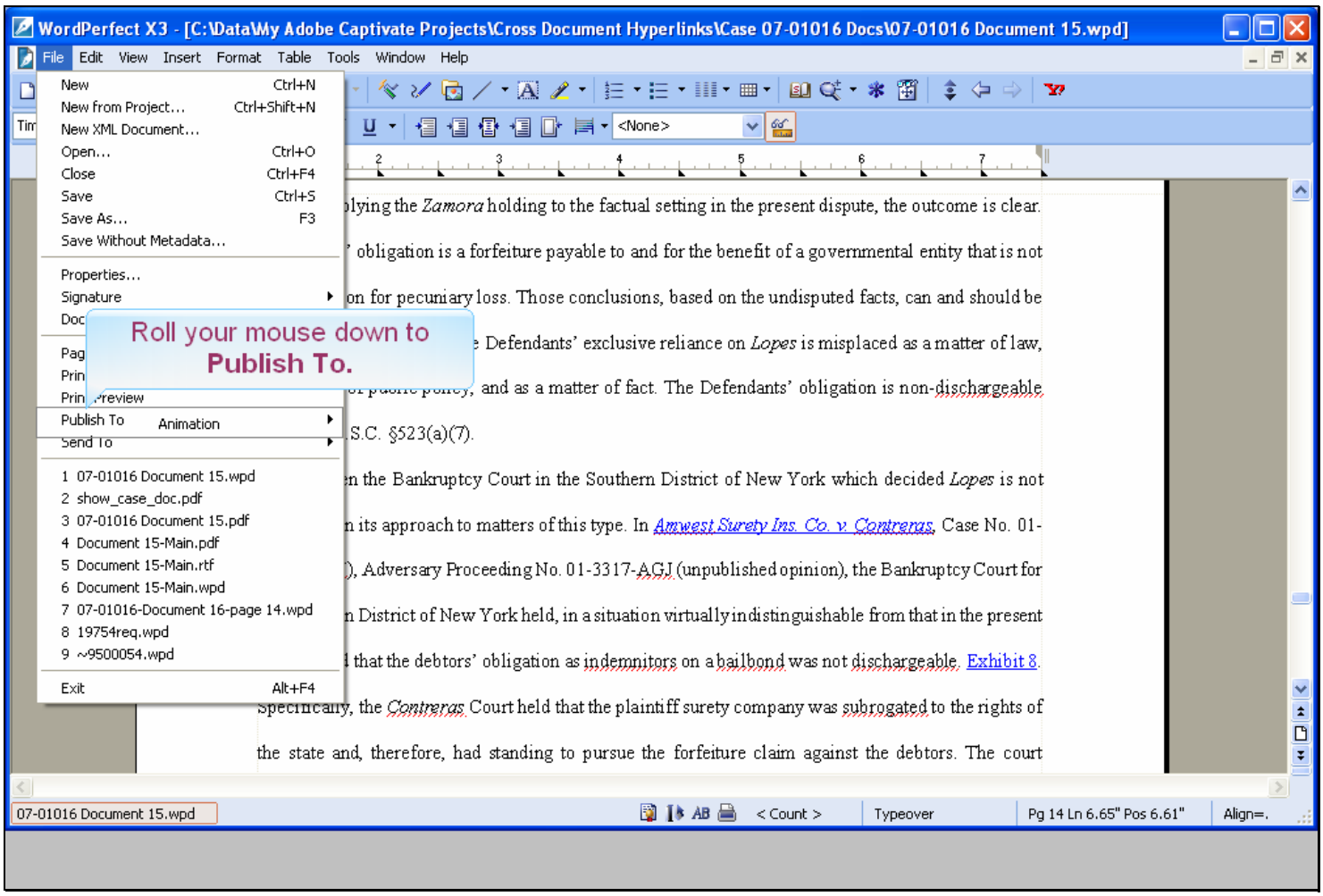
Slide 42 - Slide 42



Slide notes

(Note: This is a transition slide.)

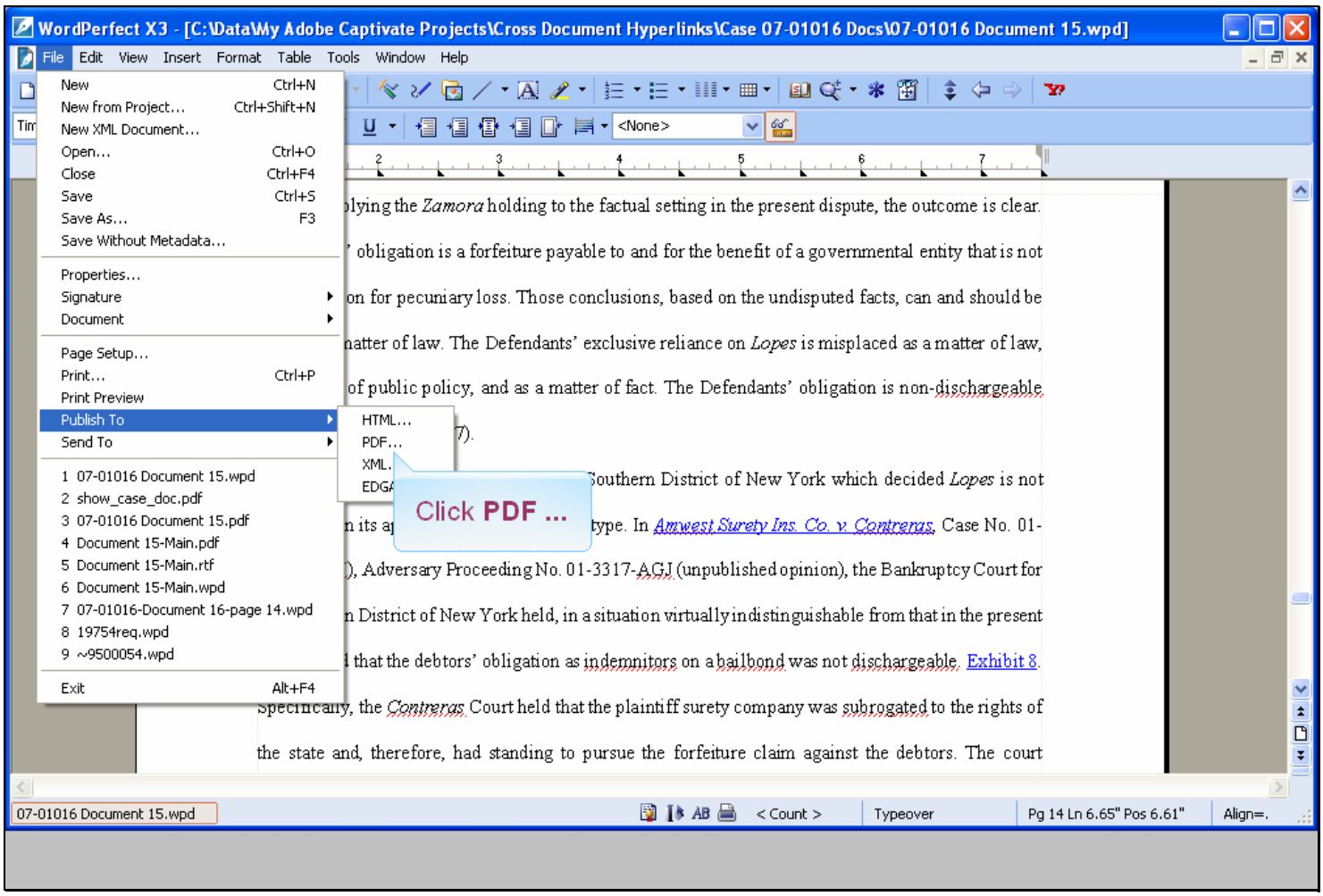
Slide 43 - Slide 43



Slide notes

Now roll your mouse down to Publish To.

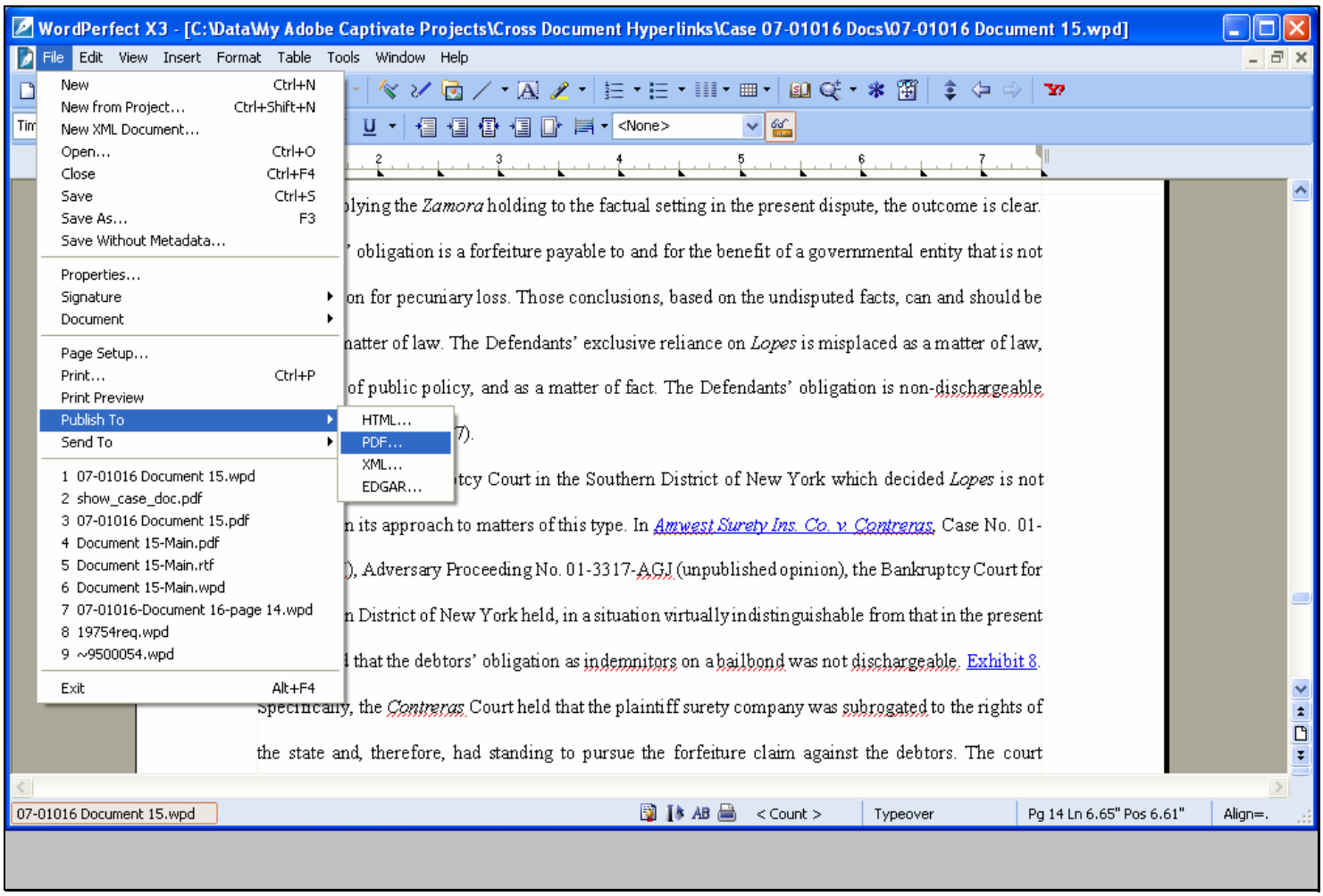
Slide 44 - Slide 44



Slide notes

And select PDF ...

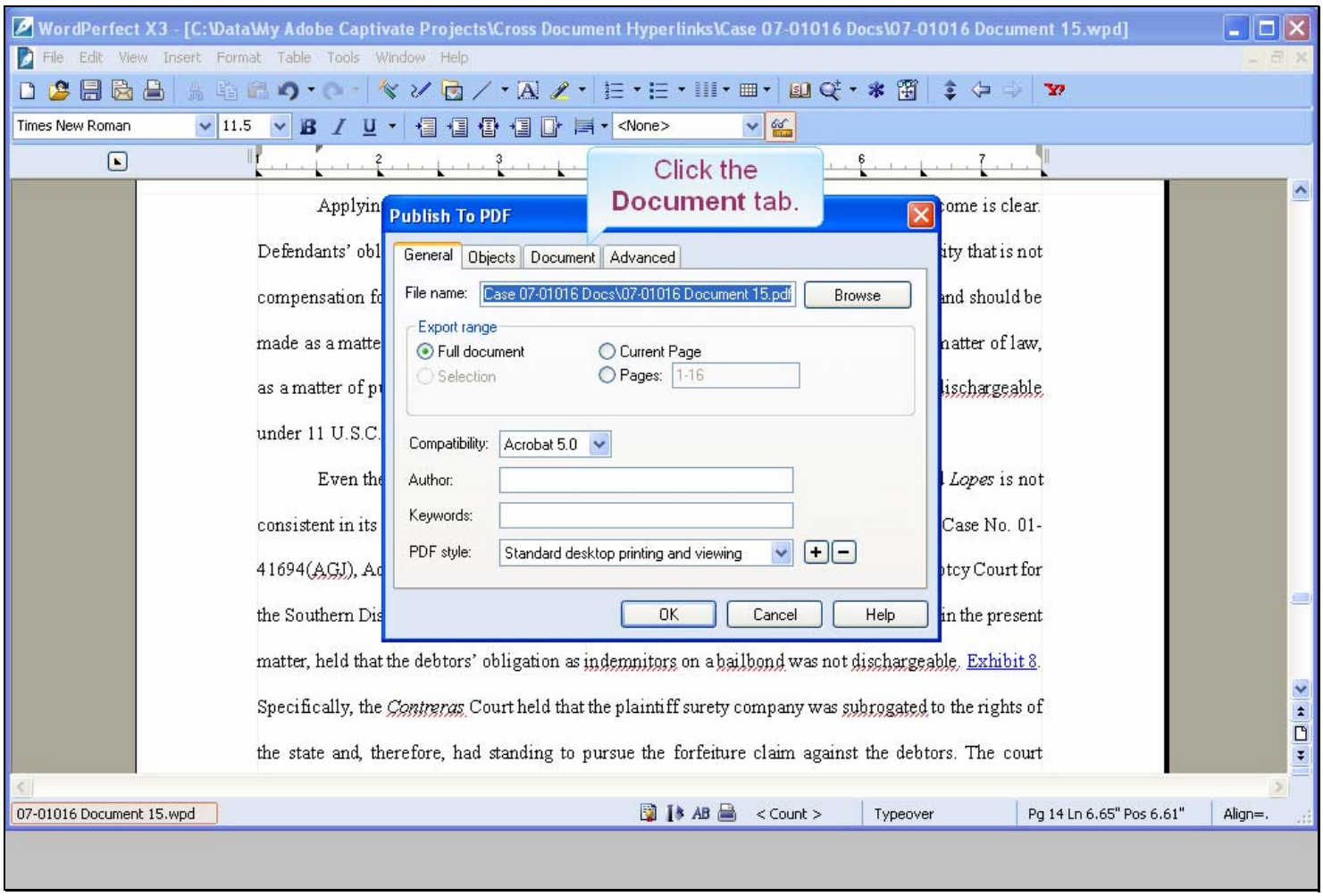
Slide 45 - Slide 45



Slide notes

(Note: This is a transition slide.)

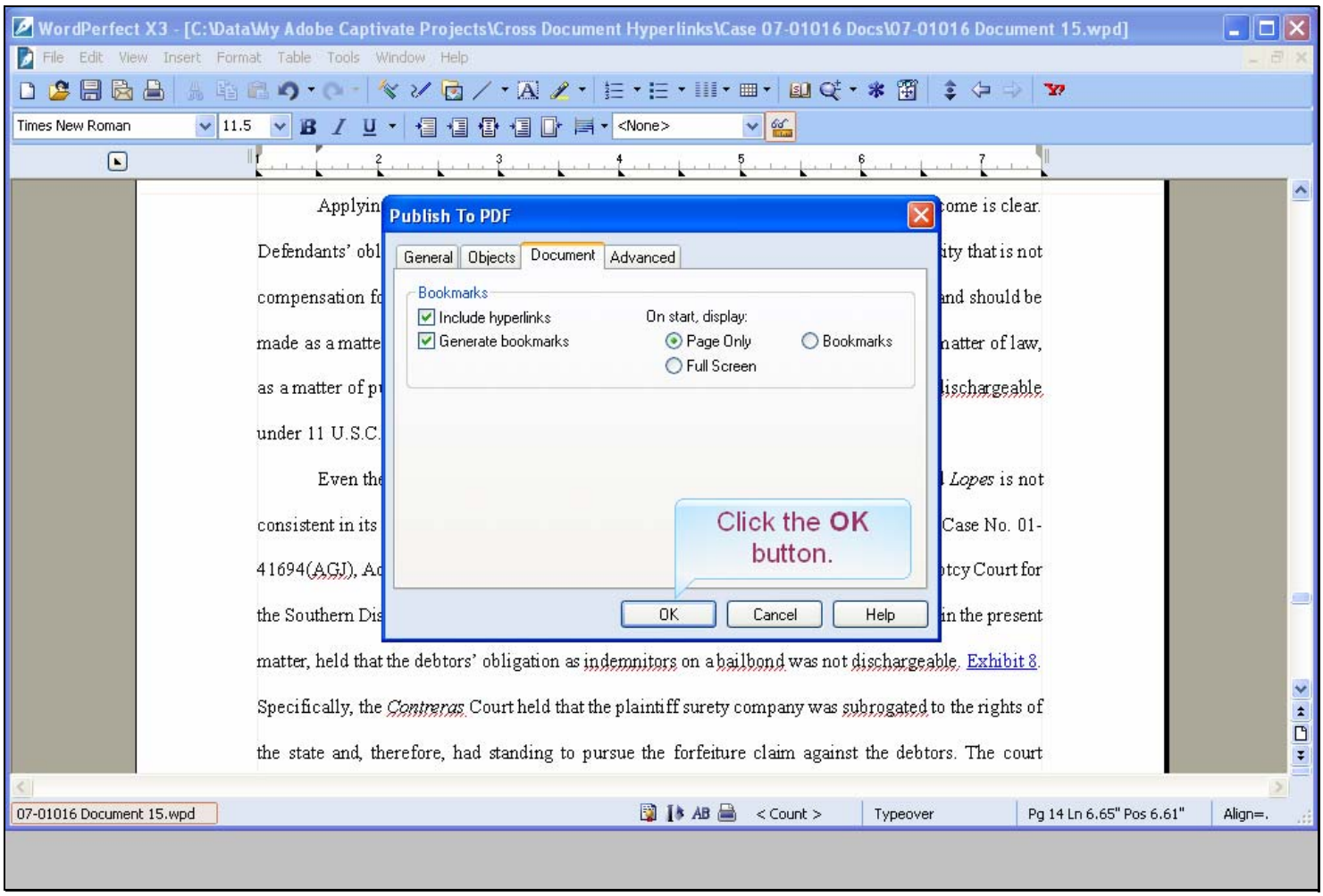
Slide 46 - Slide 46



Slide notes

A Publish to PDF dialog box opens. The File name is already filled in, but you could rename the file if desired. Publish to PDF is the preferred method rather than Print to PDF on the print dialogue box. This method prevents the link from becoming inactive. Before we publish this document, we need to check something in the Document tab. Click that tab.

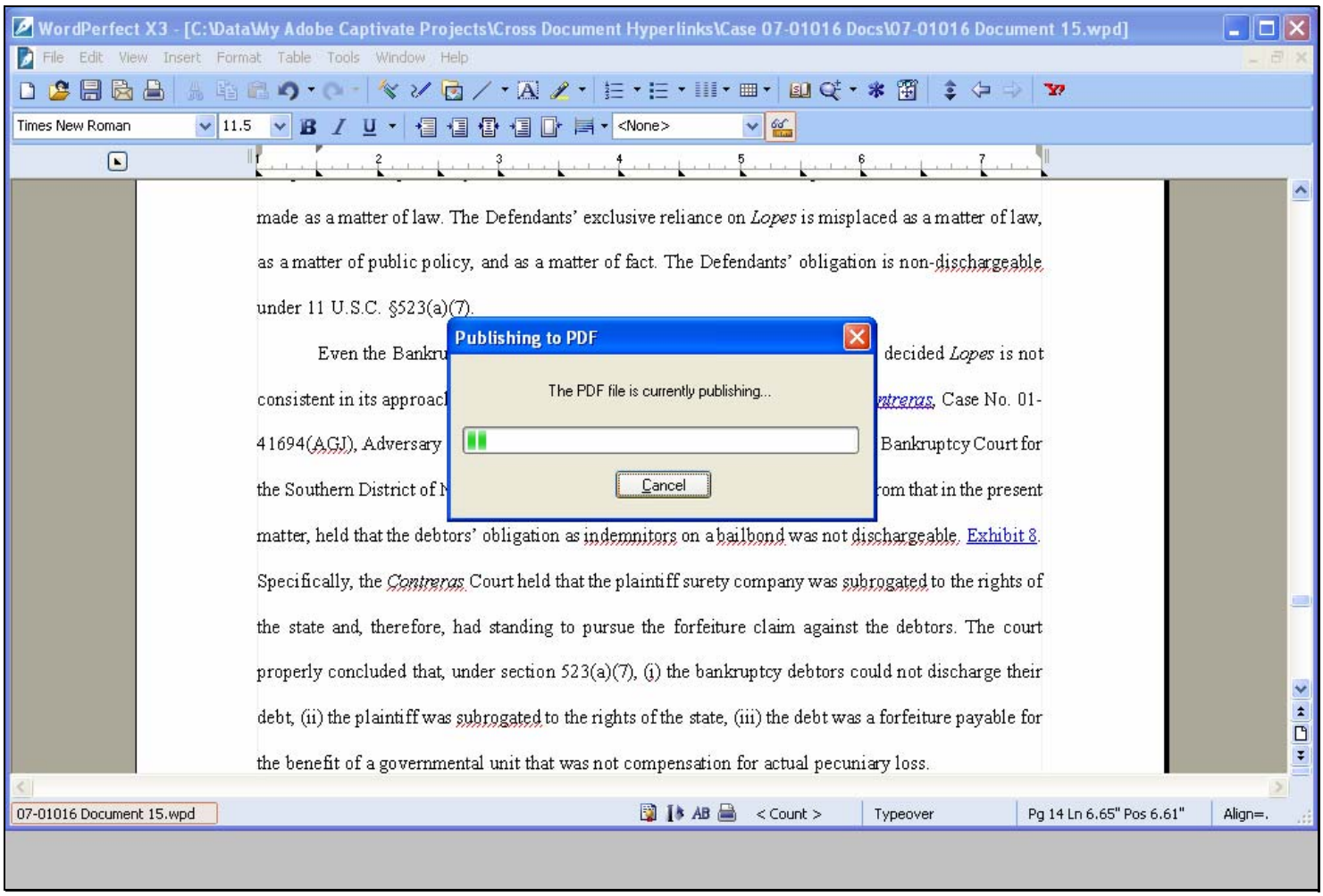
Slide 47 - Slide 47



Slide notes

One of the check boxes on the Document tab is to Include hyperlinks. Be sure this box is checked. Otherwise our PDF file will not contain the hyperlink. Since the box is checked, click the OK button to publish.

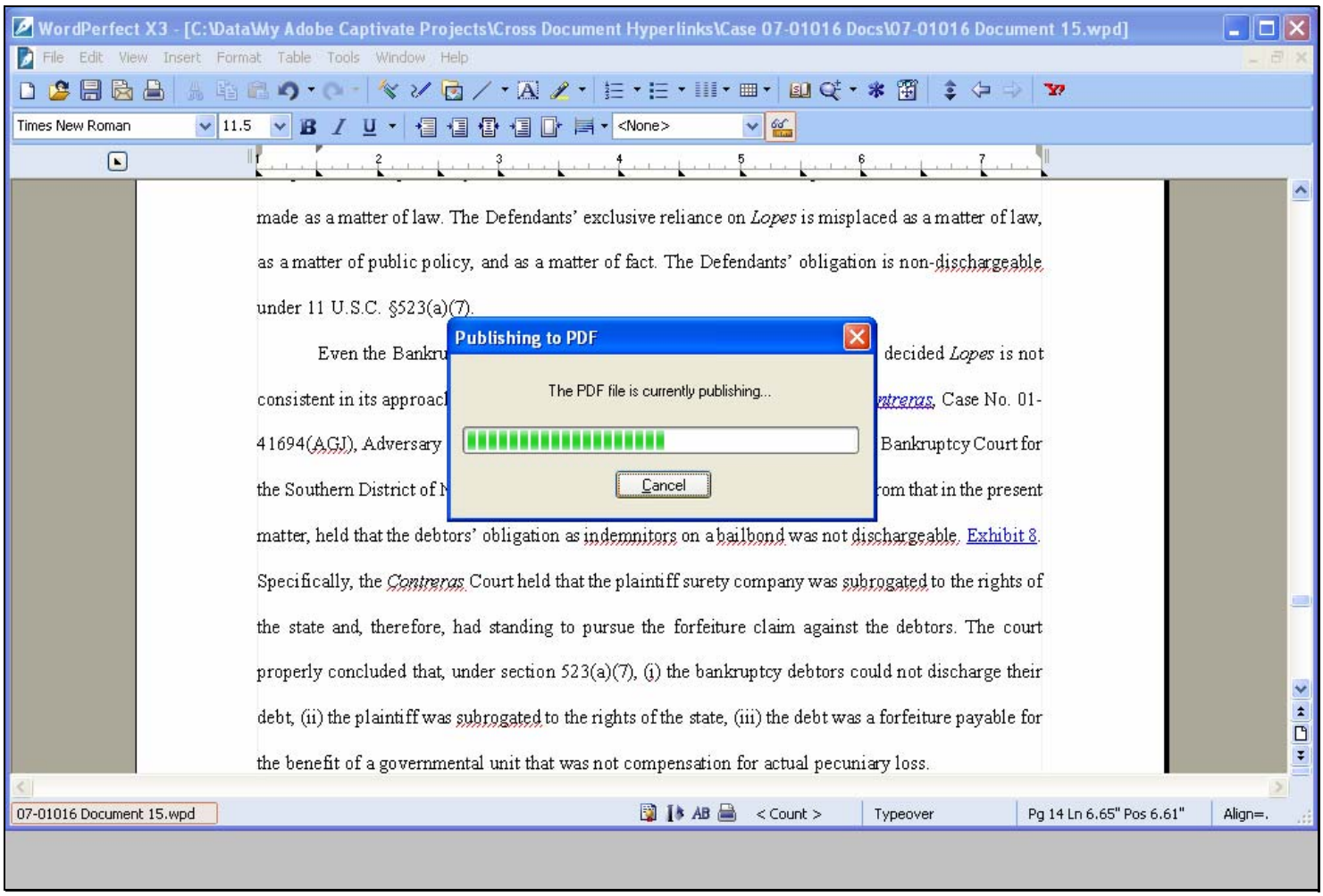
Slide 48 - Slide 48



Slide notes

(Note: This is a transition slide.)

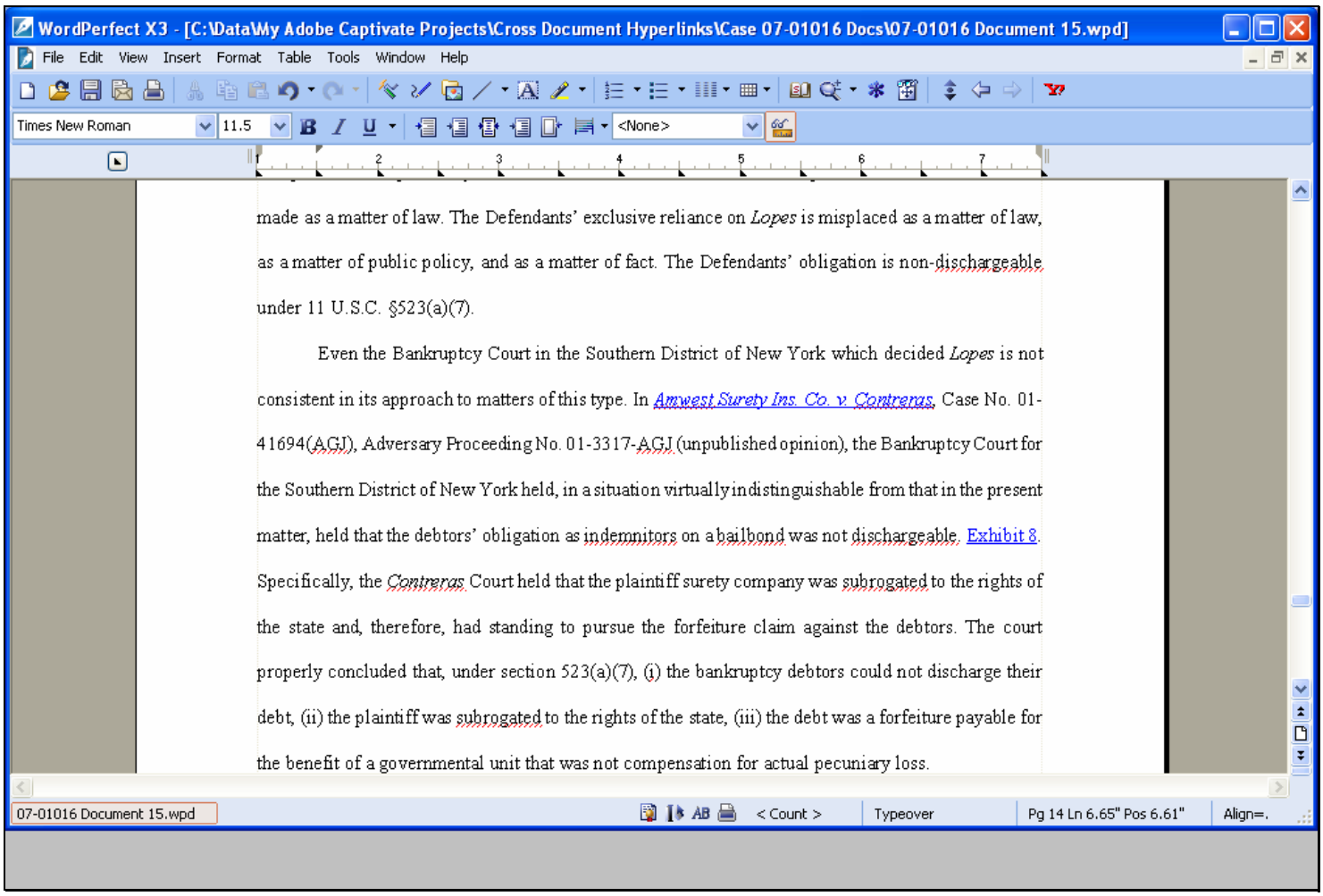
Slide 49 - Slide 49



Slide notes

(Note: This is a transition slide.)

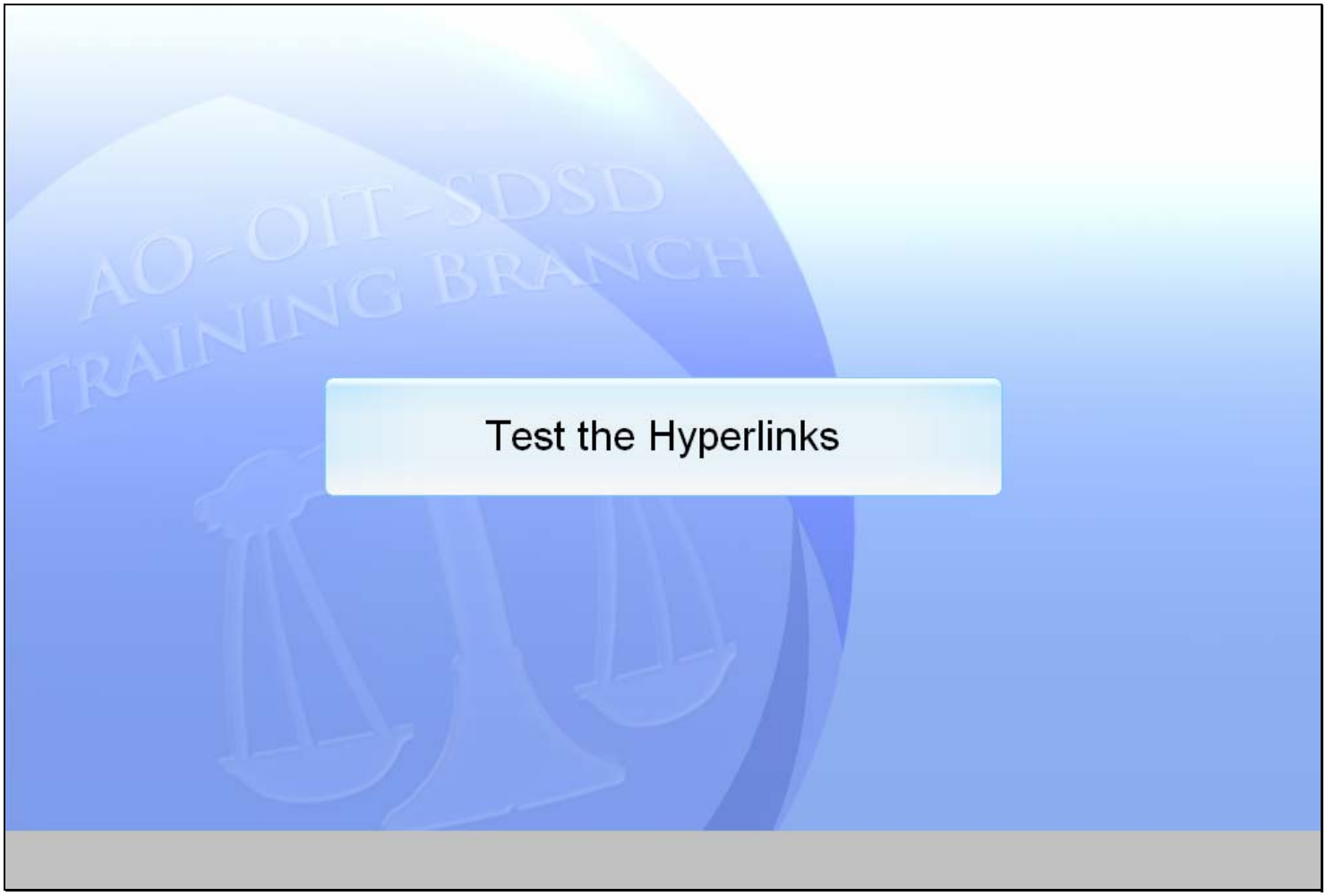
Slide 50 - Slide 50



Slide notes

And the document has been published 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.

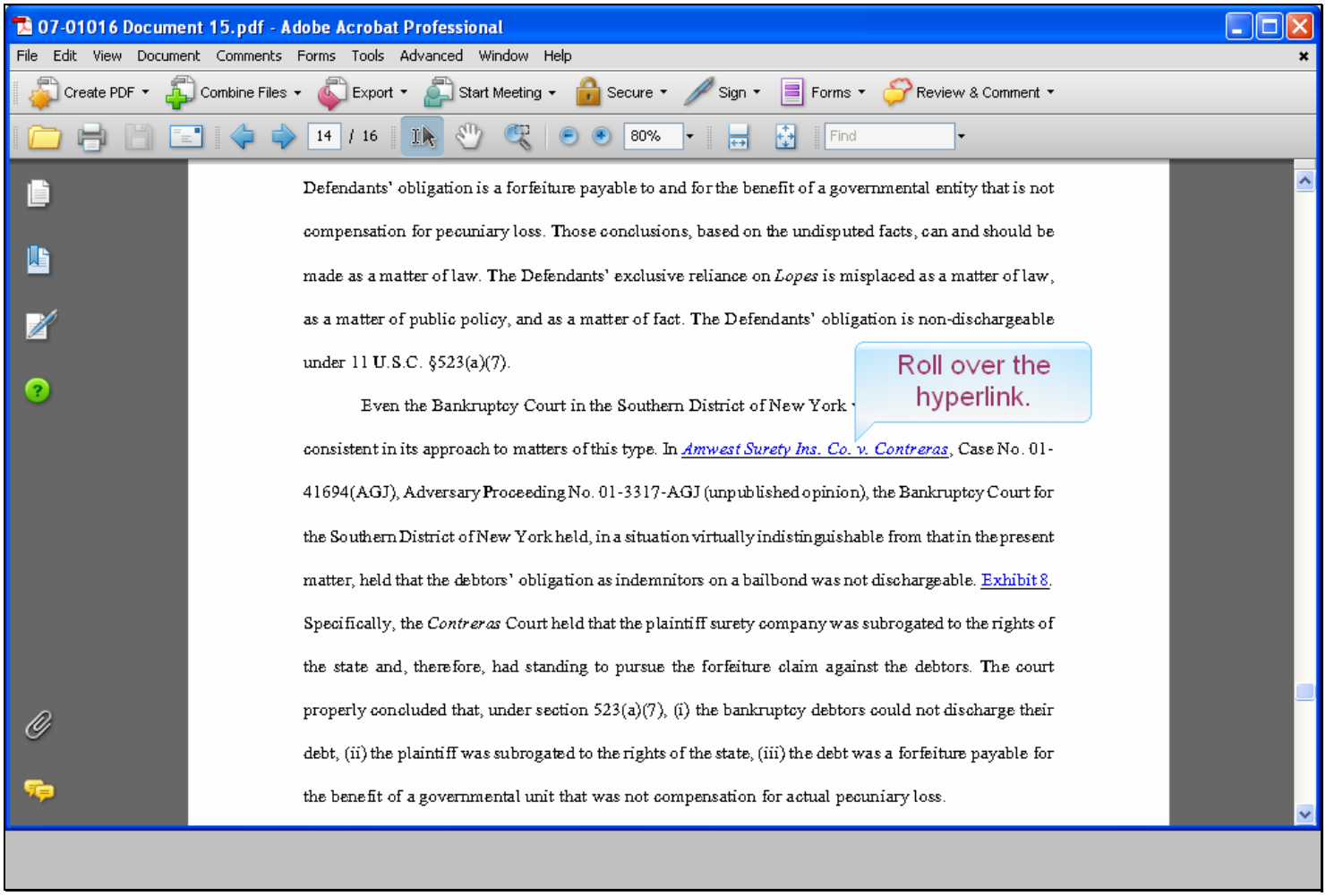
Slide 51 - Test the Hyperlinks



Slide notes

(Note: This is a transition slide.)

Slide 52 - Slide 52

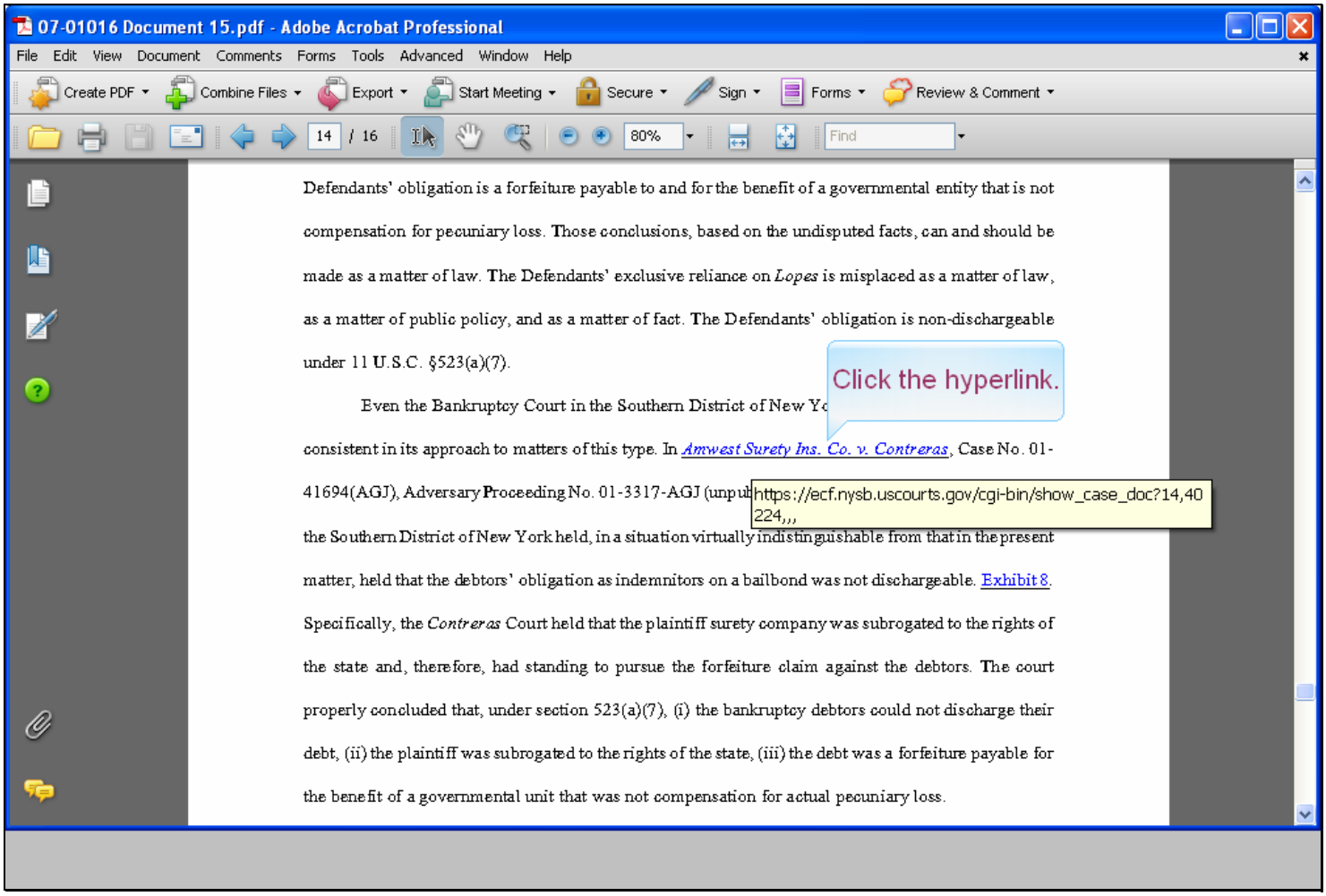


Slide notes

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 document 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.

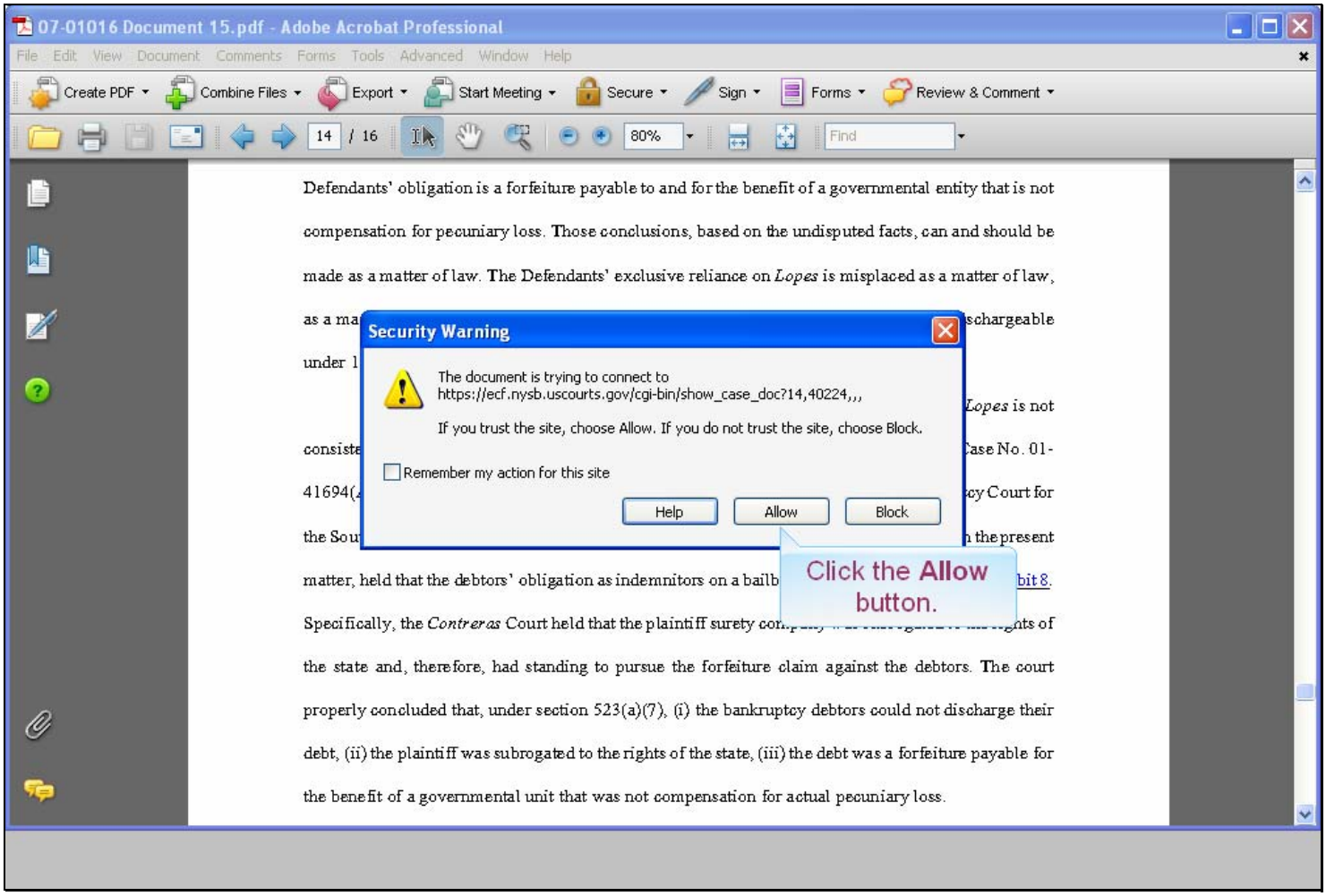
Slide 53 - Slide 53



Slide notes

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

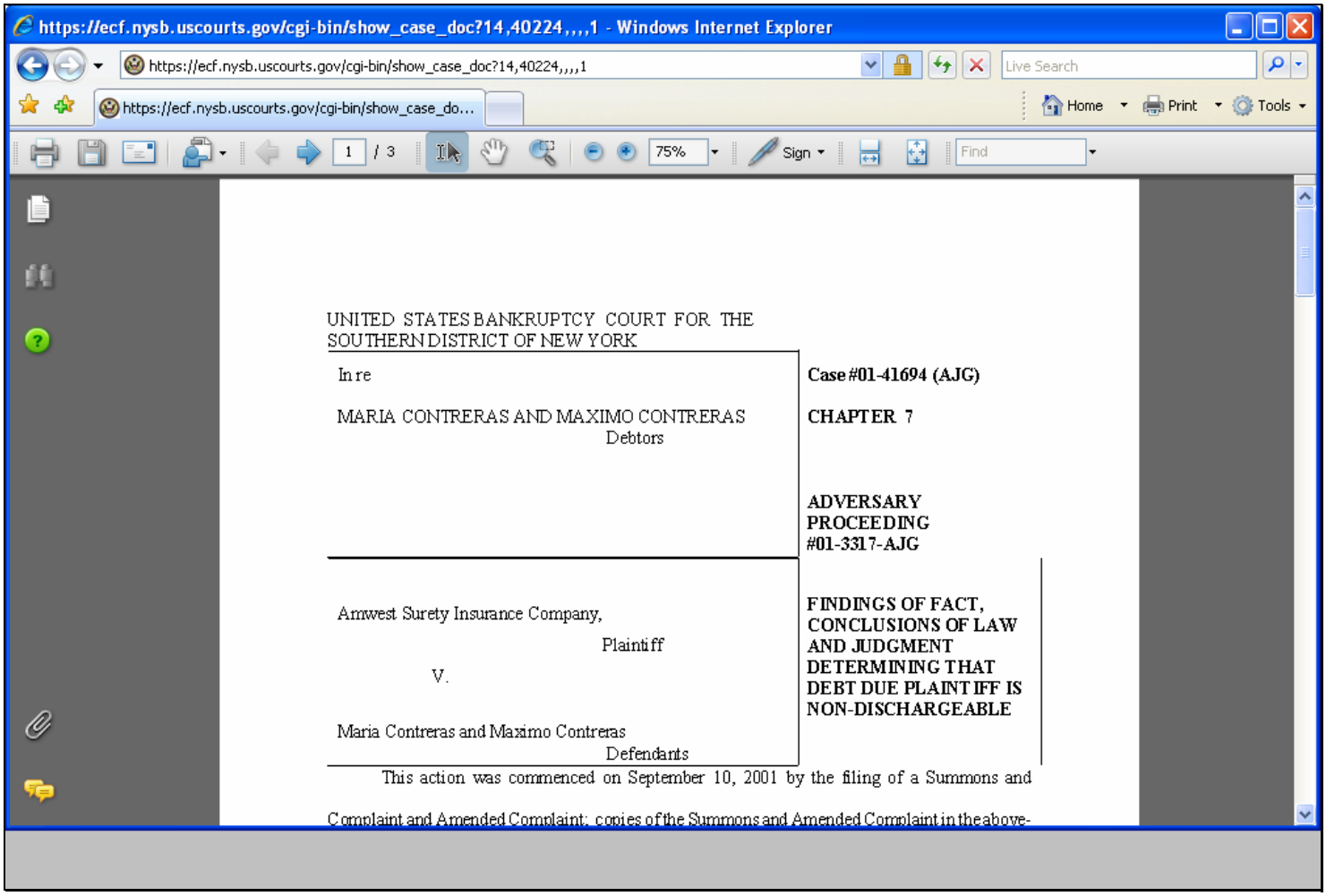
Slide 54 - Slide 54



Slide notes

A Security Warning message apears. Since we trust the Bankruptcy Court web site, click the Allow button.

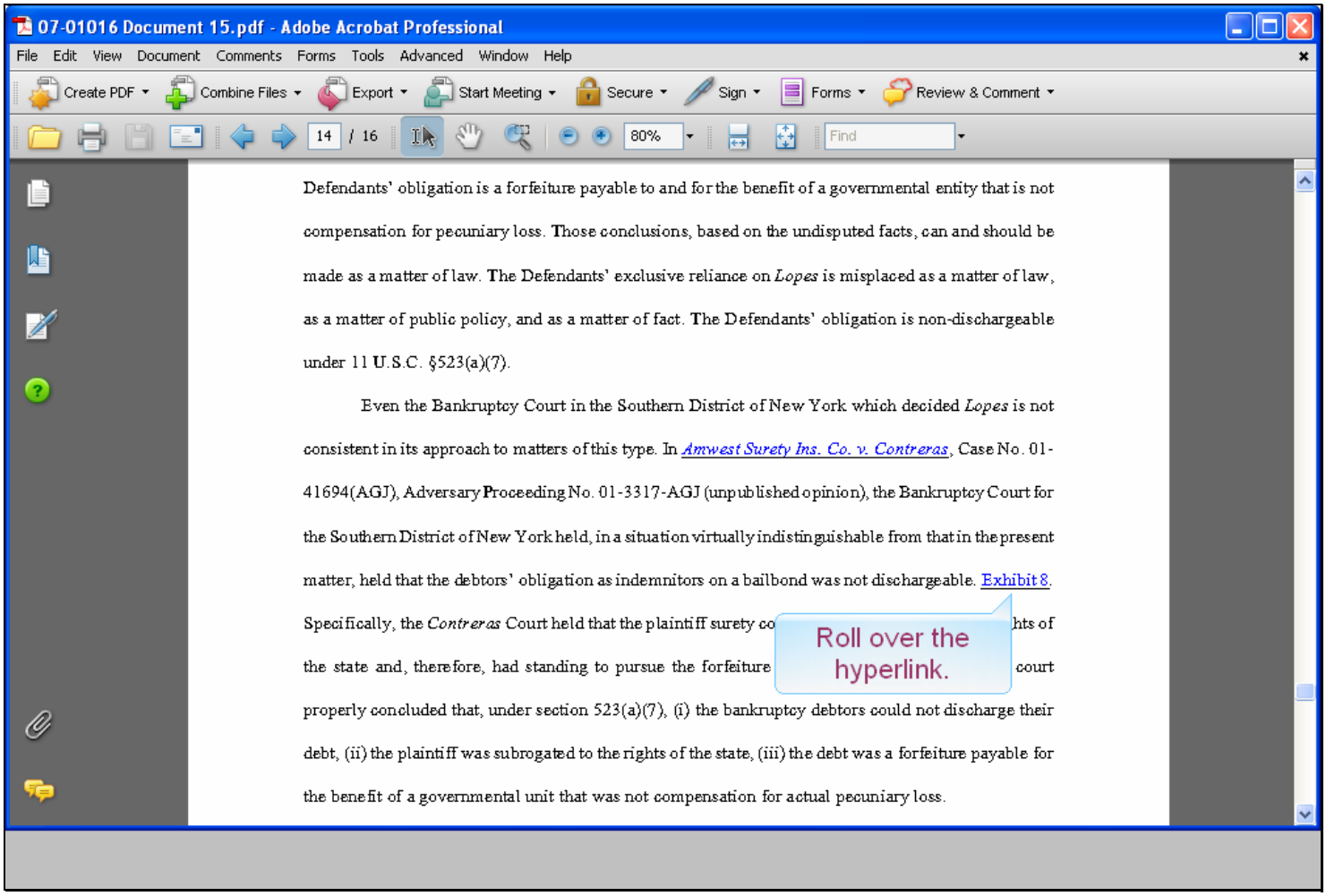
Slide 55 - Slide 55



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.

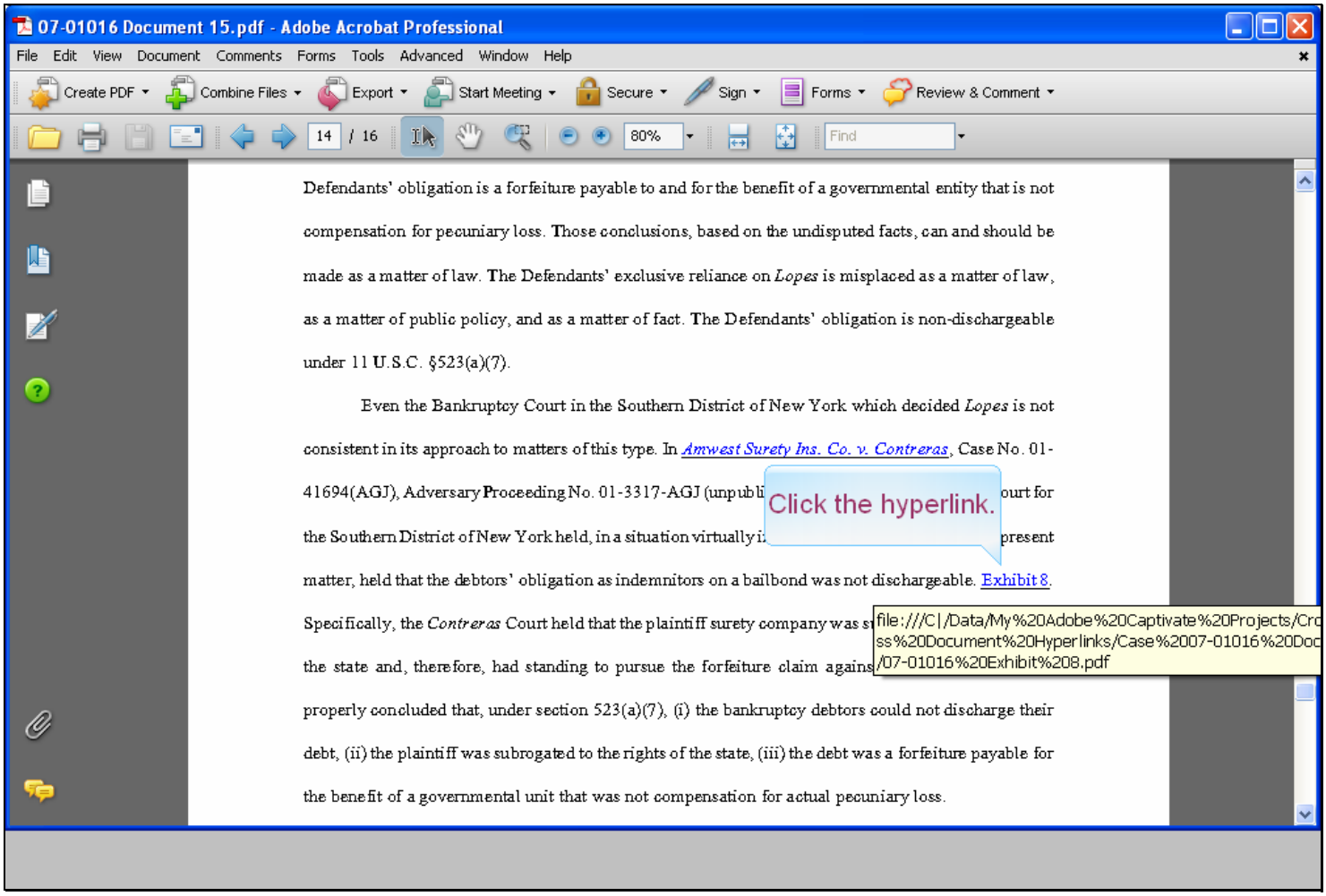
Slide 56 - Slide 56



Slide notes

We have again opened the PDF version of the brief and moved to the page that has our hyperlinks. First, move your mouse pointer to the Exhibit 8 hyperlink.

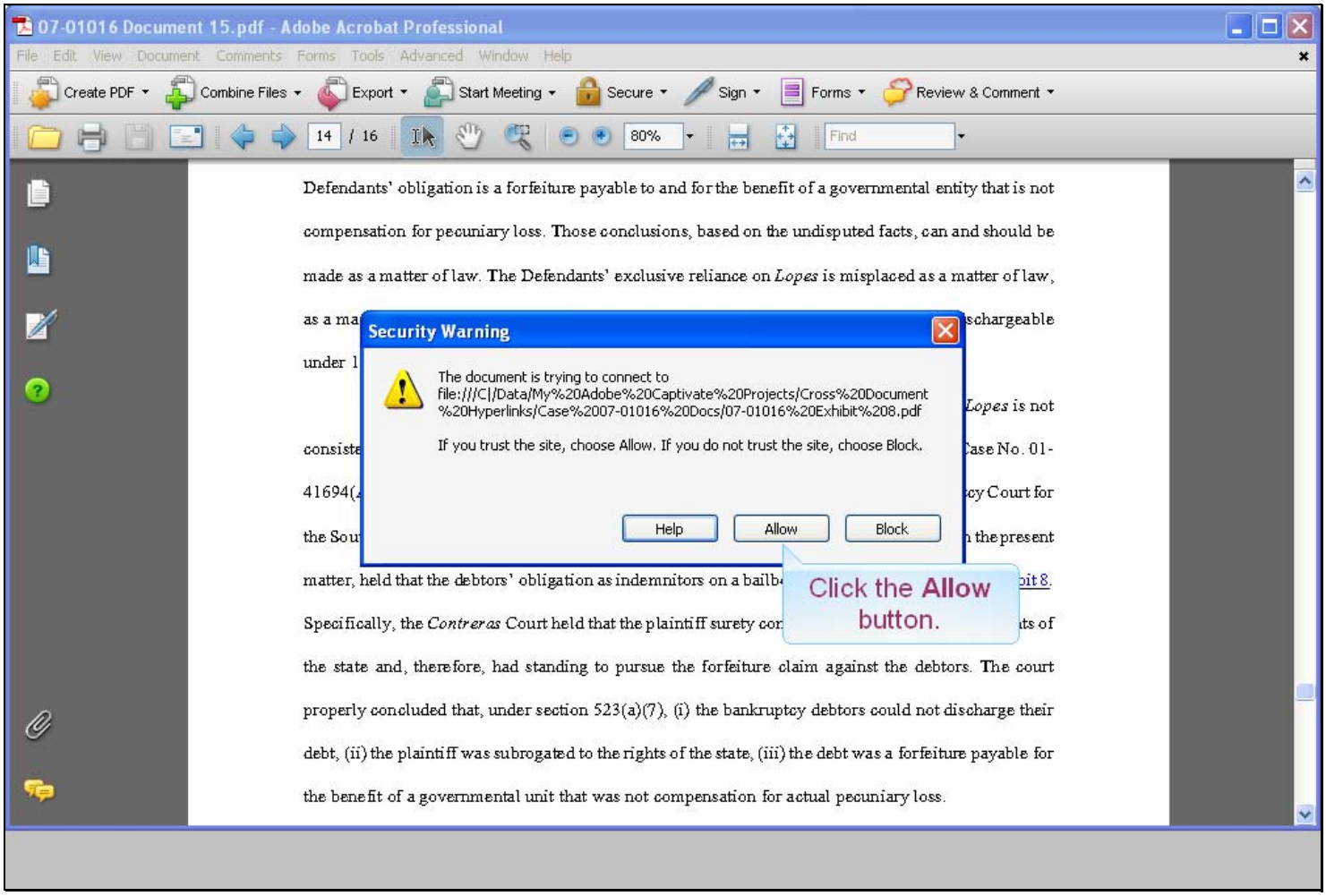
Slide 57 - Slide 57



Slide notes

As your mouse hovers over the hyperlink, Adobe Acrobat displays the address of the document on your PC. Now click the hyperlink.

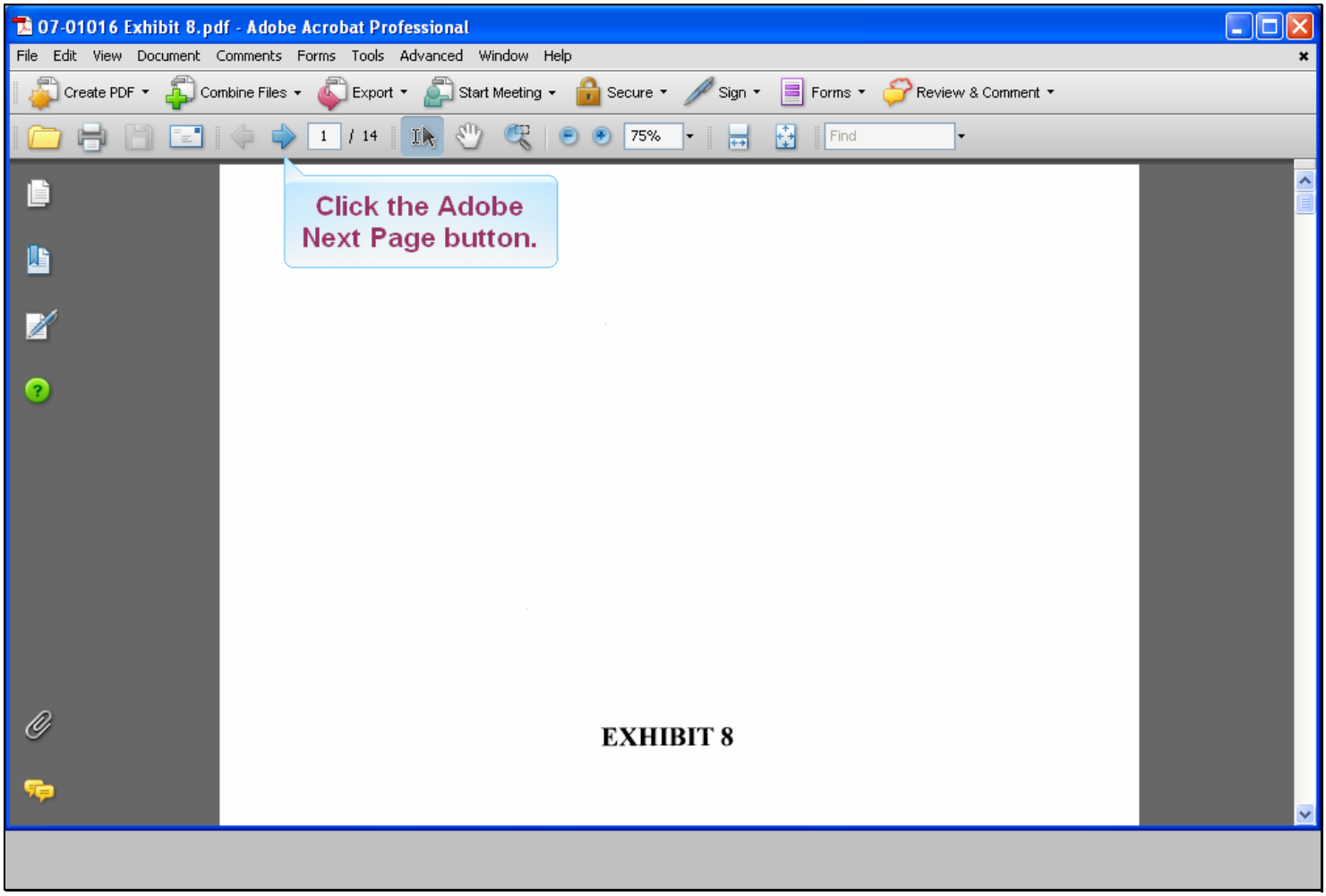
Slide 58 - Slide 58



Slide notes

A Security Warning appears. Since we trust the location of this PDF, click the Allow button.

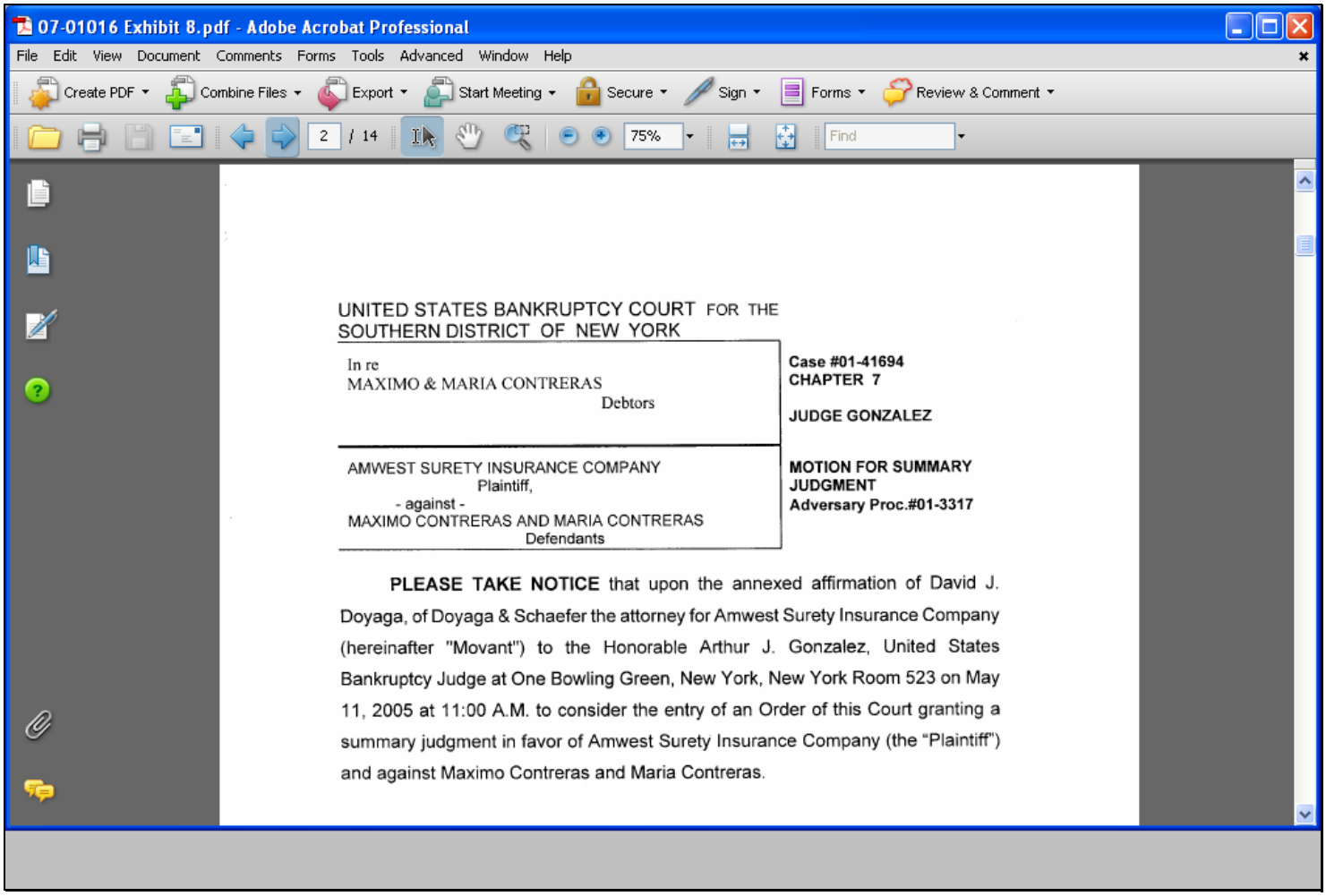
Slide 59 - Slide 59



Slide notes

The PDF document, EXHIBIT 8, opens. Let's verify that this is in fact the document. On the Adobe icon selections, click the blue Next Page button to move to page two of the document.

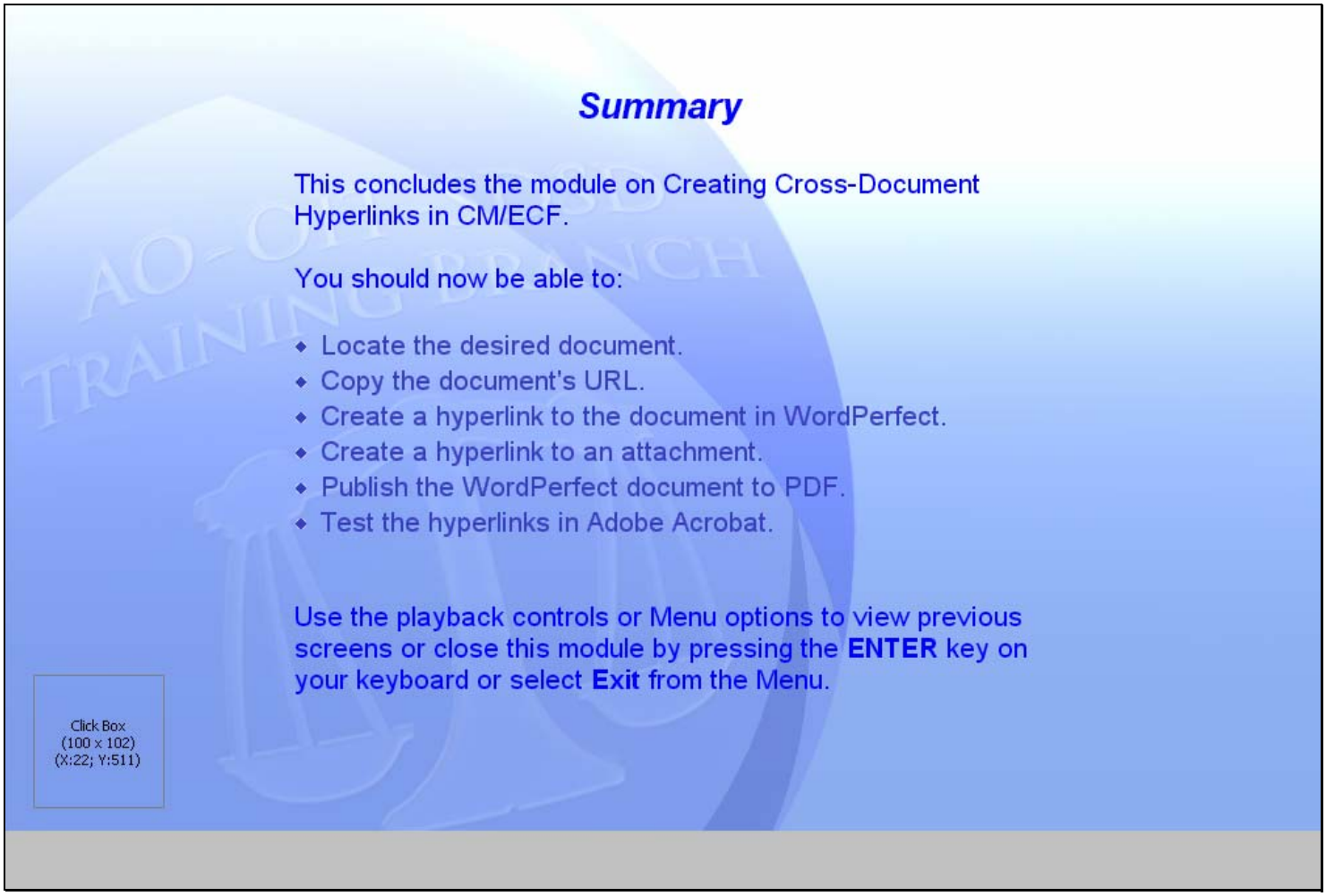
Slide 60 - Slide 60



Slide notes

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

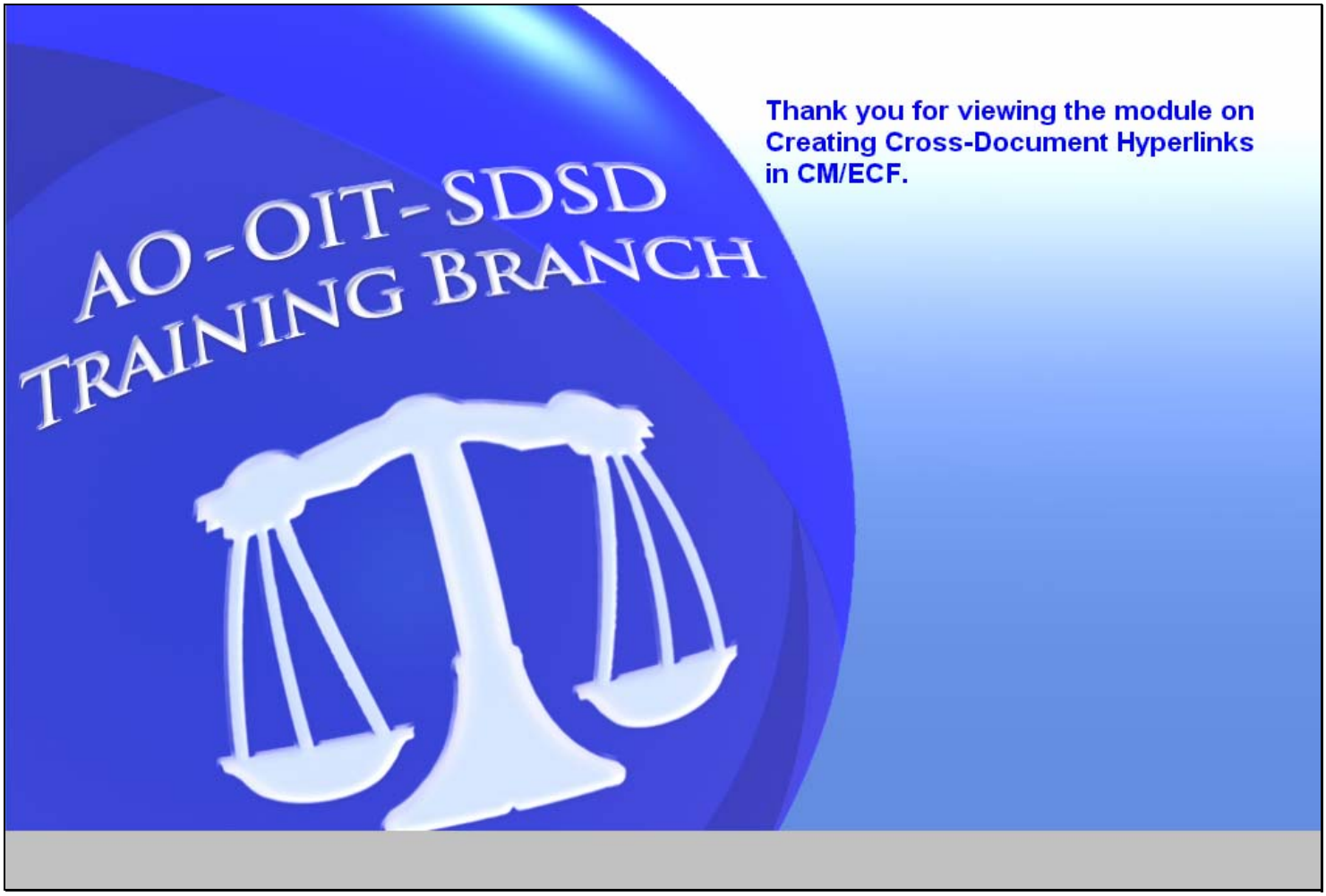
Slide 61 - Summary



Slide notes

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

Slide 62 - Exit



Slide notes

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