CROSS-DOCUMENT HYPERLINKS

CM/ECF now permits court and attorney users to file documents that include hyperlinks to a previously filed document in the same case or another case that resides on the CM/ECF system where the filing is being entered, or on any other court's CM/ECF system, as well as to a document that is being filed in the same submission, such as exhibits to motions or memos of law. A document can be linked to another document in any federal court's database if the court is running the appropriate version of CM/ECF that includes the hyperlink function: District (Release 3.1); Bankruptcy (Release 3.2); and/or Appellate (available as of July 2006).

Details on the new functionality:

1. The hyperlink, as set by the filer, may link to the start of the document or to a specific page in the document.

2. A filer can file a document that includes a hyperlink to a document that is being filed simultaneously (in the same docketing transaction) with the primary document (e.g., a Memo in Support of Summary Judgment may have hyperlinks to the attached documents that are part of the same docketing transaction).

3. Immediately after a document is filed in CM/ECF, that document will be available to be linked as a hyperlink in a subsequently filed document.

4. A hyperlink to a CM/ECF document will be retained even if the case or document is moved to a different server.

5. If a user can access a CM/ECF server, but the document cannot be found (e.g., the case or document has been deleted), a message will be displayed to that effect. If a user clicks on a hyperlink to a CM/ECF document stored on a server that cannot be accessed (e.g., the system is down, network issues), an error message will be displayed.

6. A user cannot access a hyperlink to a restricted document (e.g., a private entry, sealed document) unless the user has appropriate permissions.

General assumptions about cross-document hyperlink usage:

1. Any document that includes a hyperlink must also include a description of the standard citation to the hyperlinked material. The hyperlink is a convenience, not a citation replacement.

2. The ability to file documents with hyperlinks to any external URL (e.g., Westlaw, Lexis) is not affected by the cross-document hyperlink functionality.

3. Editing a docket entry will not affect the unique location of the document.

4. The CM/ECF application will not verify the validity of URLs included as hyperlinks within documents filed in CM/ECF.

5. This hyperlink functionality has been tested and works properly with Corel WordPerfect 11 or higher and Microsoft Word 2002 or higher. Hyperlinks added to documents created in other word processing programs may not function properly once the documents are converted to PDF format.

CREATING HYPERLINKS TO PREVIOUSLY FILED CM/ECF DOCUMENTS

To create a link between a document being filed in CM/ECF and a previously filed CM/ECF document, follow the steps below:

> **NOTE**: Users should not copy hyperlinks from Notices of Electronic Filing (NEFs). NEFs contain special information that allows them to provide one "free look" to qualified recipients and should not be used for Cross-Document Hyperlinks. Instead of copying hyperlinks in NEFs, users should run a report in CM/ECF, such as the Docket Report, and copy the document number hyperlink from the report.

STEP 1   Access the appropriate CM/ECF system and run the Docket Report for the case that contains the document you want to link to.

STEP 2   Locate the document among the docket entries.

STEP 3   Copy the URL of the document to the clipboard. To do this, hover over the document link and click the right mouse button. Select **Copy Shortcut** (*Internet Explorer/Netscape*) (Figure 1) OR **Copy Link Location** (*Firefox*). *NOTE*: The document link is represented by a number with an underscore (e.g., 2).

> **NOTE**: If you want to link to an attachment to a primary document filed in CM/ECF, you must select the hyperlink to the attachment from the Document Selection Menu (Figure 2). For example, if you are linking to a memorandum of law filed with a motion, you must first select the motion from the docket sheet. When the Document Selection Menu appears, copy the URL of the attachment by following the procedure outlined above.
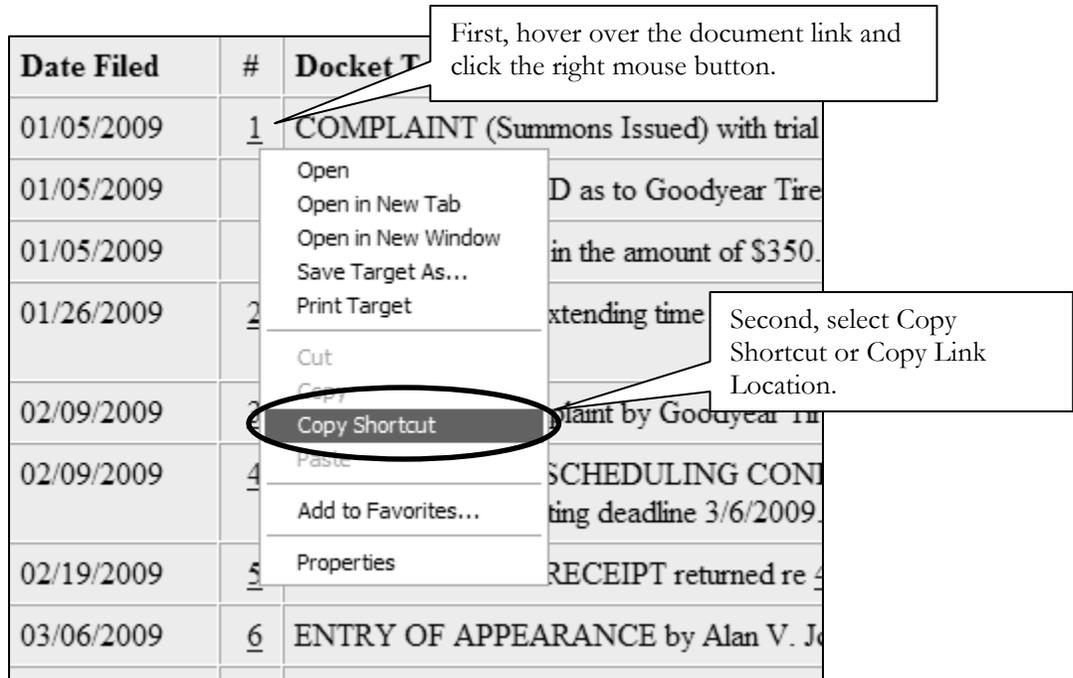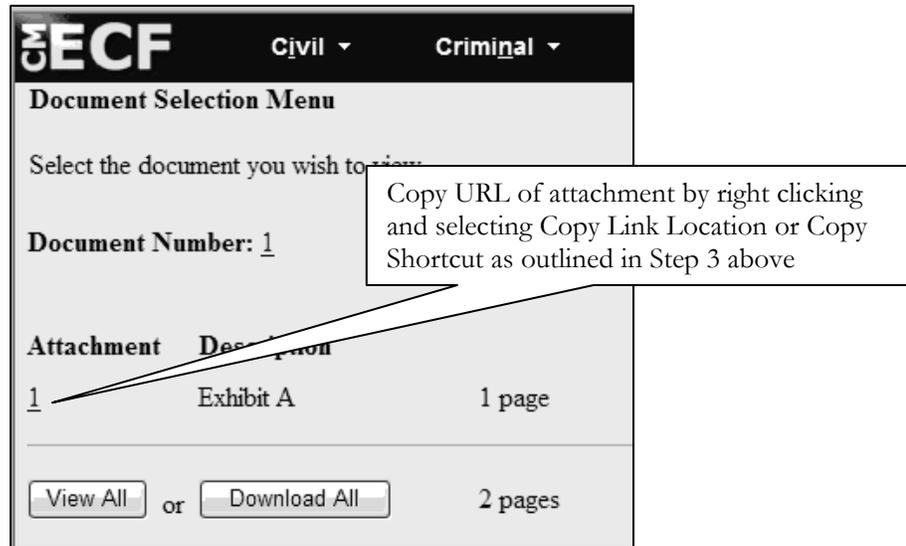

Figure 1: Internet Explorer

Figure 2: Copy URL of Attachment to Document

NOTE: From this point, the proper method for inserting the hyperlinks in your document depends on whether you are using WordPerfect or Word to create your document. Please refer to the appropriate section below depending on whether you use WordPerfect or Word.

WORDPERFECT

STEP 4   In WordPerfect, open the document you want to add the hyperlink to.

- In the document, select and highlight the appropriate text to be hyperlinked, such as "Memorandum of Law" shown in Figure 3.
- Click **Tools** on the menu toolbar.
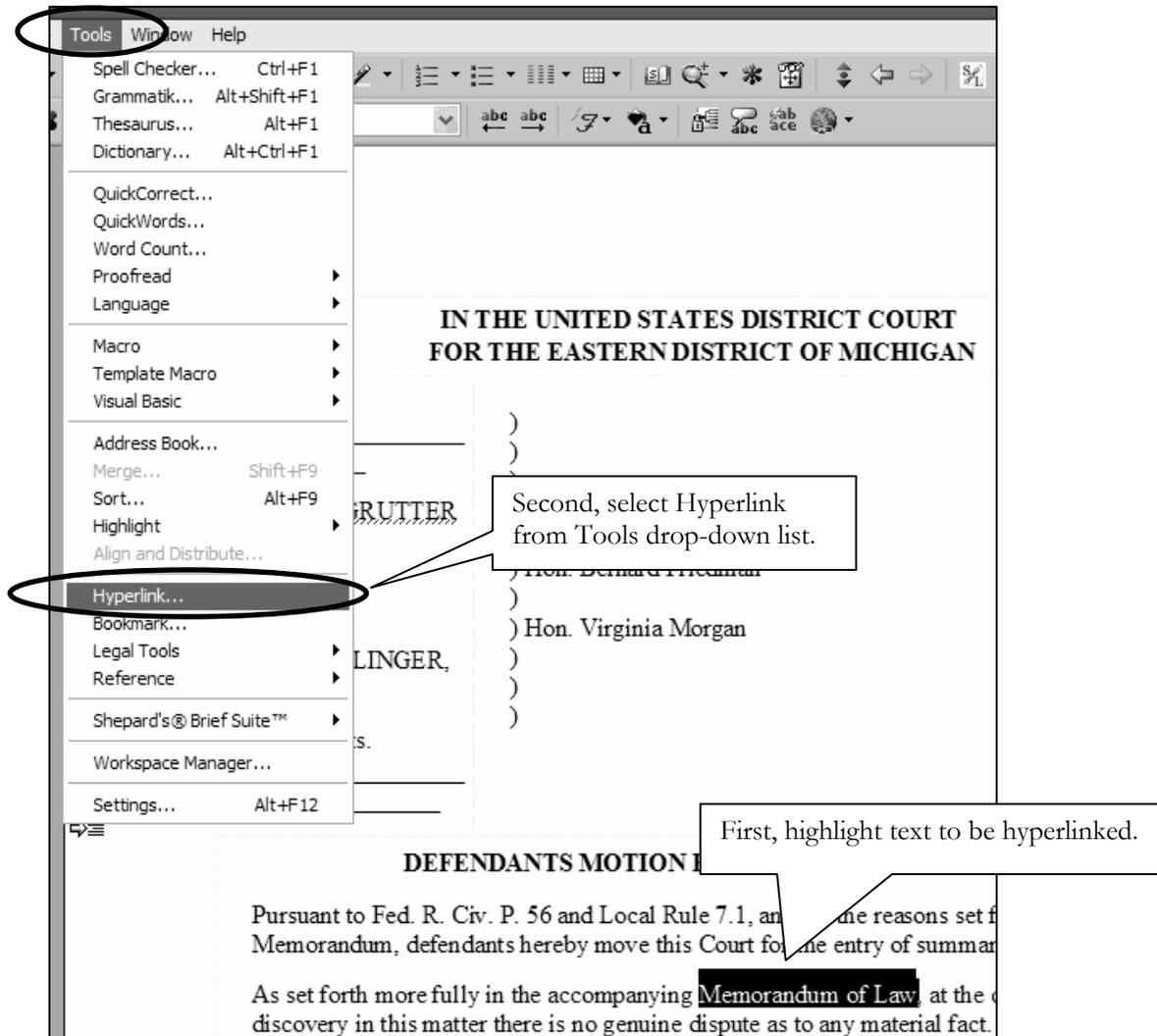- Select **Hyperlink** from the drop-down list.

Figure 3: Highlight Text to Create the Hyperlink

STEP 5   Next, the Hyperlink Properties dialog box appears (Figure 4).

- **Paste** the URL of the document copied in Step 3 into the **Document/Macro** field of the Hyperlink Properties window by clicking the right mouse button and selecting **Paste** or by using the **Ctrl + V** command.
- Click the **OK** button and the Hyperlink Properties dialog box will close.
- The hyperlink text is now underlined indicating a hyperlink has been created.

NOTE: Users may append to the URL a citation to a specific page number within the document, if necessary. To do this, enter **?page=<page number>** at the end of the URL, for example, **http://usdc.uscourts.gov/doc1/00103032?incHeader=y?page=23**.
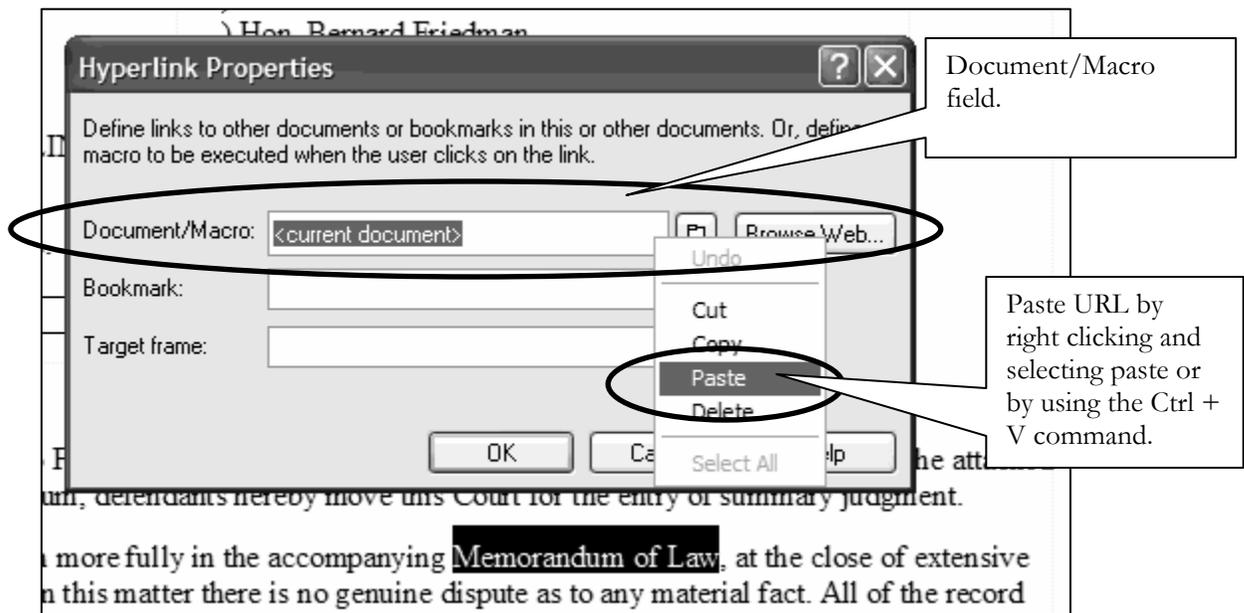

Figure 4: Paste URL

STEP 6   The next step is to convert the WordPerfect document to PDF format using the **Publish to...** or **Publish to PDF** function in WordPerfect (Figure 5). Converting to PDF using other methods will <u>not</u> retain the hyperlink.

- **Save** the document
- Click **File** on the menu toolbar.
- Select **Publish to...** then **PDF** or **Publish to PDF** from the drop-down list (this selection depends on the version of WordPerfect you are using).
- Navigate, if necessary, and store the PDF document in a local directory. Do not print a WordPerfect document to Adobe PDF Writer. You must use **Publish to...** or **Publish to PDF** if the document contains a hyperlink. Printing to PDF is permitted if the document does not contain hyperlinks.
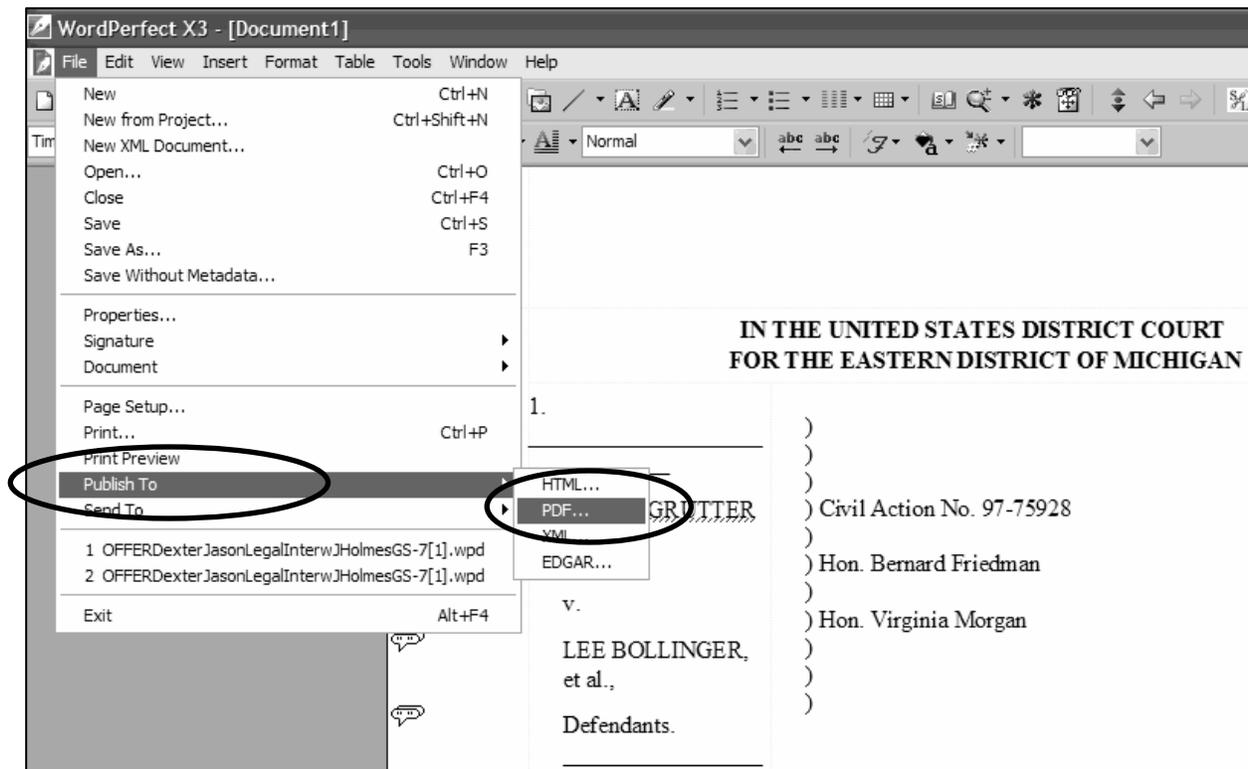

 Figure 5: Publish to PDF

STEP 7   **Save** the document.

STEP 8   Docket the appropriate CM/ECF event and attach the PDF document to the docket entry as usual.

<u>NOTE</u>: Do not convert a WordPerfect document to Adobe PDF Writer by selecting the print option for Cross-Document Hyperlinks functionality. <u>Publish to PDF must be used if a document contains a hyperlink.</u>

MICROSOFT WORD

STEP 4   In Microsoft Word, open the document you want to add the hyperlink to.

- In the document, select and highlight the appropriate text to be hyperlinked, such as "Memorandum of Law" shown in Figure 6.
- Click **Insert** on the menu toolbar.
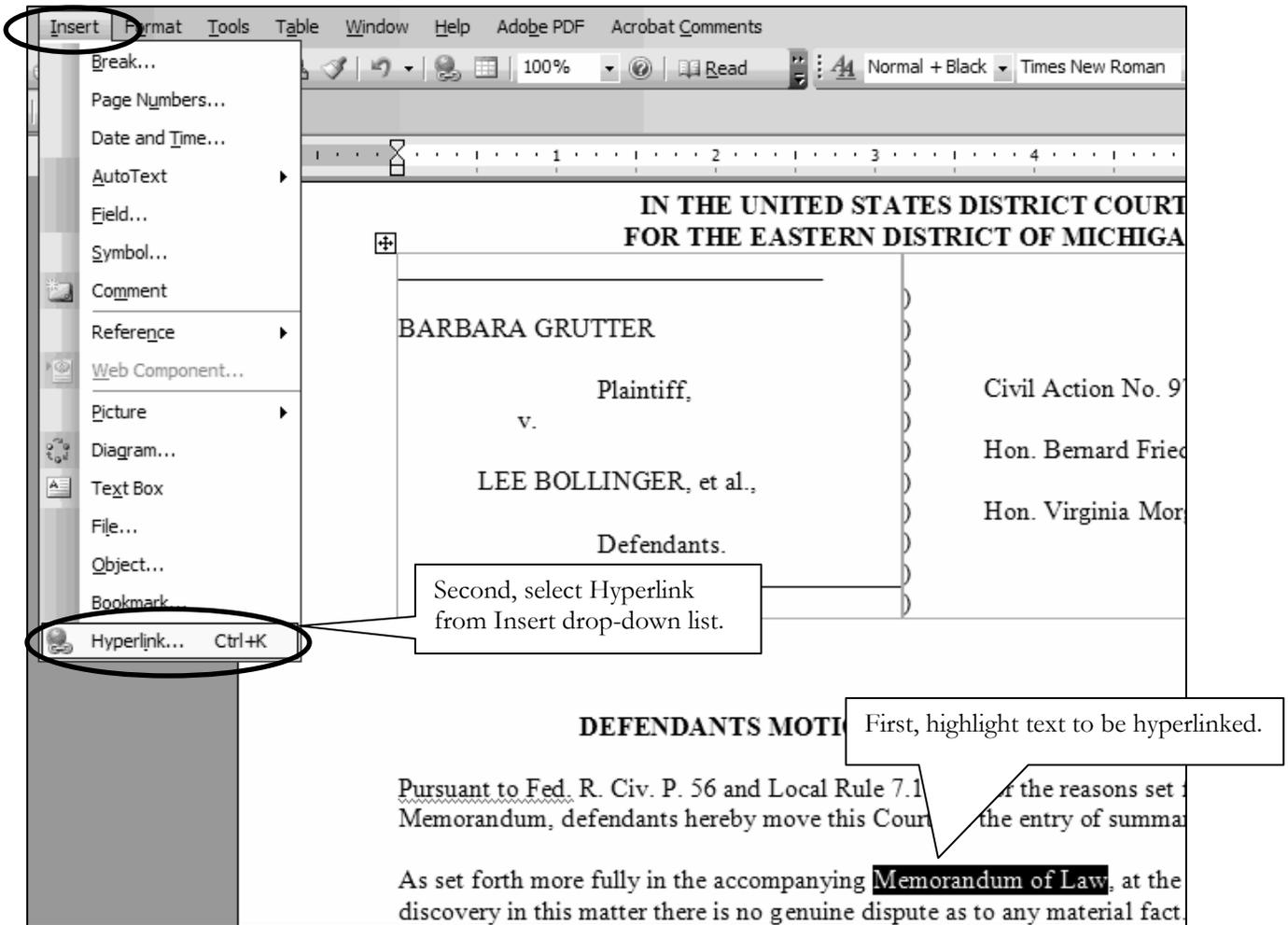- Select **Hyperlink** from the drop-down list.

Figure 6: Highlight Text to Create Hyperlink

STEP 5   Next, the Insert Hyperlink dialog box appears (Figure 7).

- **Paste** the URL of the document copied in Step 3 into the **Address** field of the Insert Hyperlink window by clicking the right mouse button and selecting **Paste** or by using the **Ctrl + V** command. The URL of the CM/ECF document is pasted (displays) in the address field.
- Click the **OK** button and the Insert Hyperlink dialog box will close.
- The hyperlink text is now underlined indicating a hyperlink has been created.

NOTE: Users may append to the URL a citation to a specific page number within the document, if necessary. To do this, enter **?page=<page number>** at the end of the URL, for example, **http://usdc.uscourts.gov/doc1/00103032?incHeader=y?page=23**.
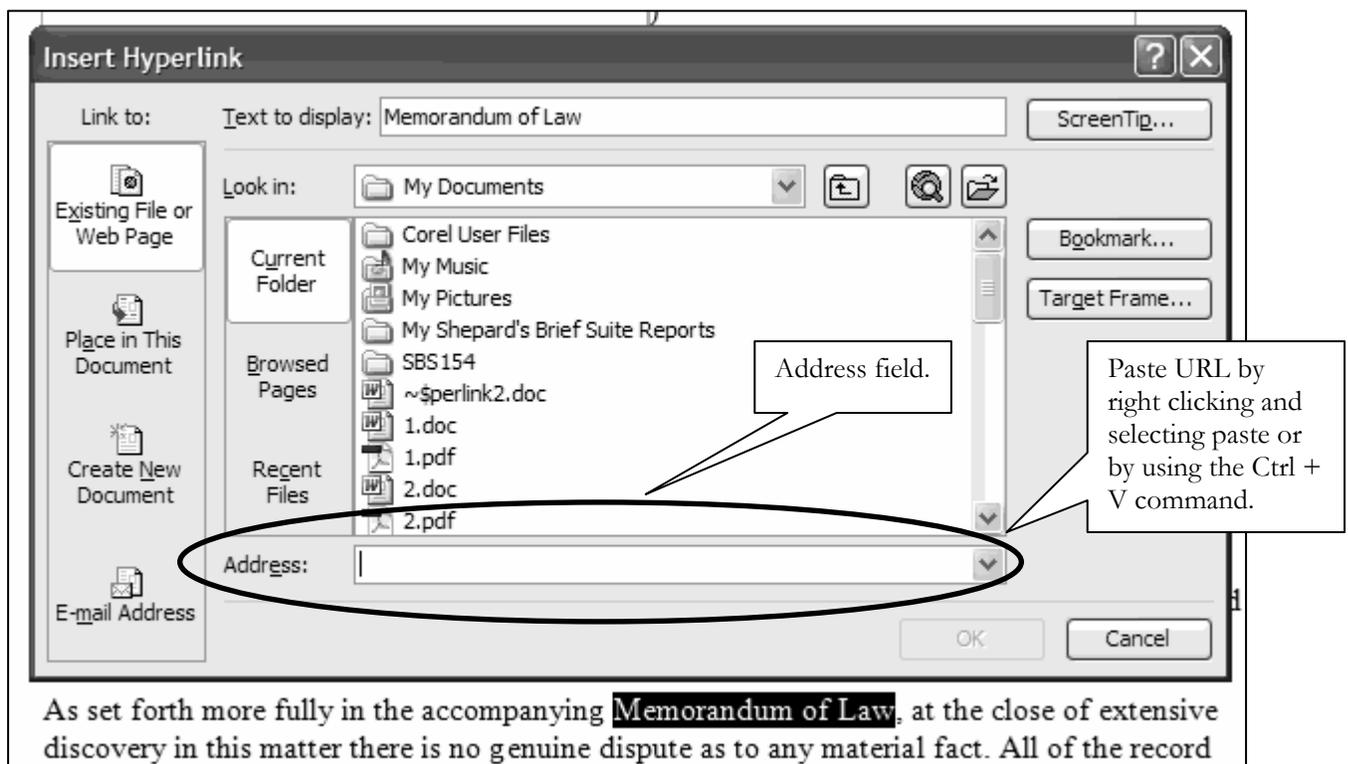

Figure 7: Paste URL

STEP 6   **Save** the document before converting to PDF.

STEP 7   Convert the document to PDF. To convert a Word document to be filed in the CM/ECF system to PDF that contains a hyperlink, the Adobe Acrobat application <u>must be</u> used. No other conversion software can be used.

- Click the Convert to Adobe PDF icon on your menu toolbar or Adobe PDF button depending on the version of Word you are using (Figure 8).
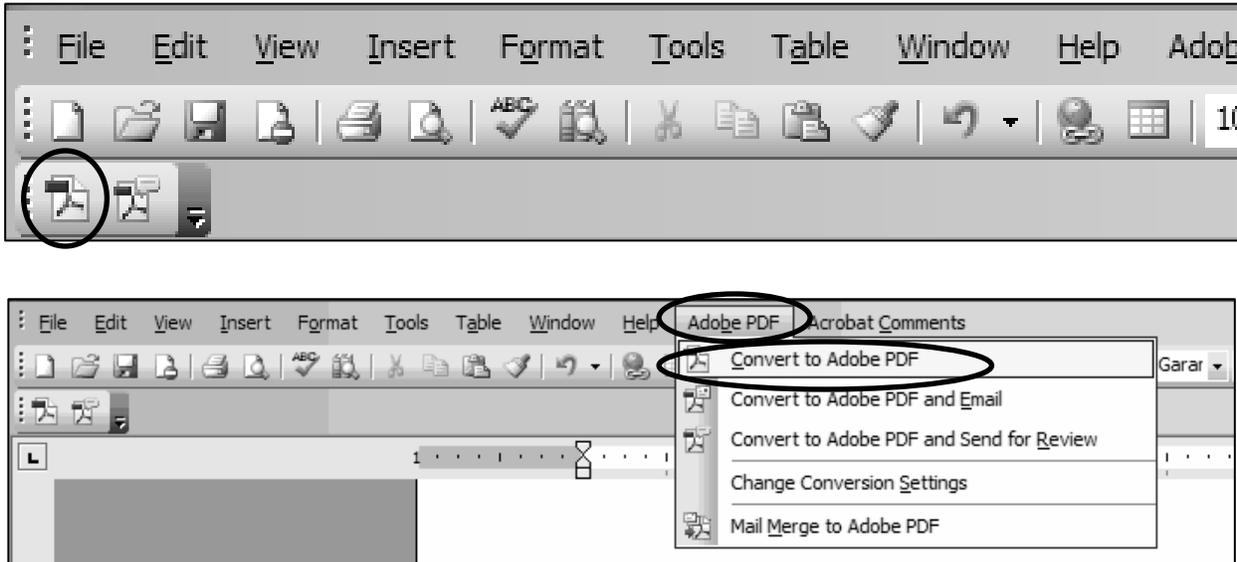

Figure 8: Microsoft Word menu toolbar

<u>OR</u>

- Close the Word document.
- Open Adobe Acrobat.
- Click **File** on the menu toolbar (Figure 9).
- Select **Create PDF** then **From File** (Figure 9).
- Navigate to the appropriate directory/folder where the Word document is stored. Select the document and click the **Open** button as shown in Figure 10. A series of windows will open as the document is converted.

STEP 8   When the conversion is completed, the document is displayed in the Adobe Acrobat window. Save and close the Adobe file.

STEP 9   Docket the appropriate CM/ECF event and attach the PDF document to the docket entry as usual.
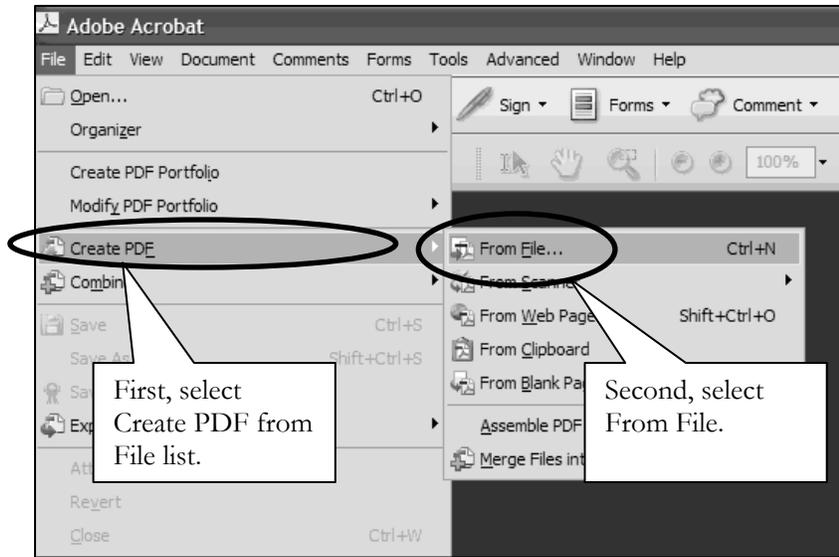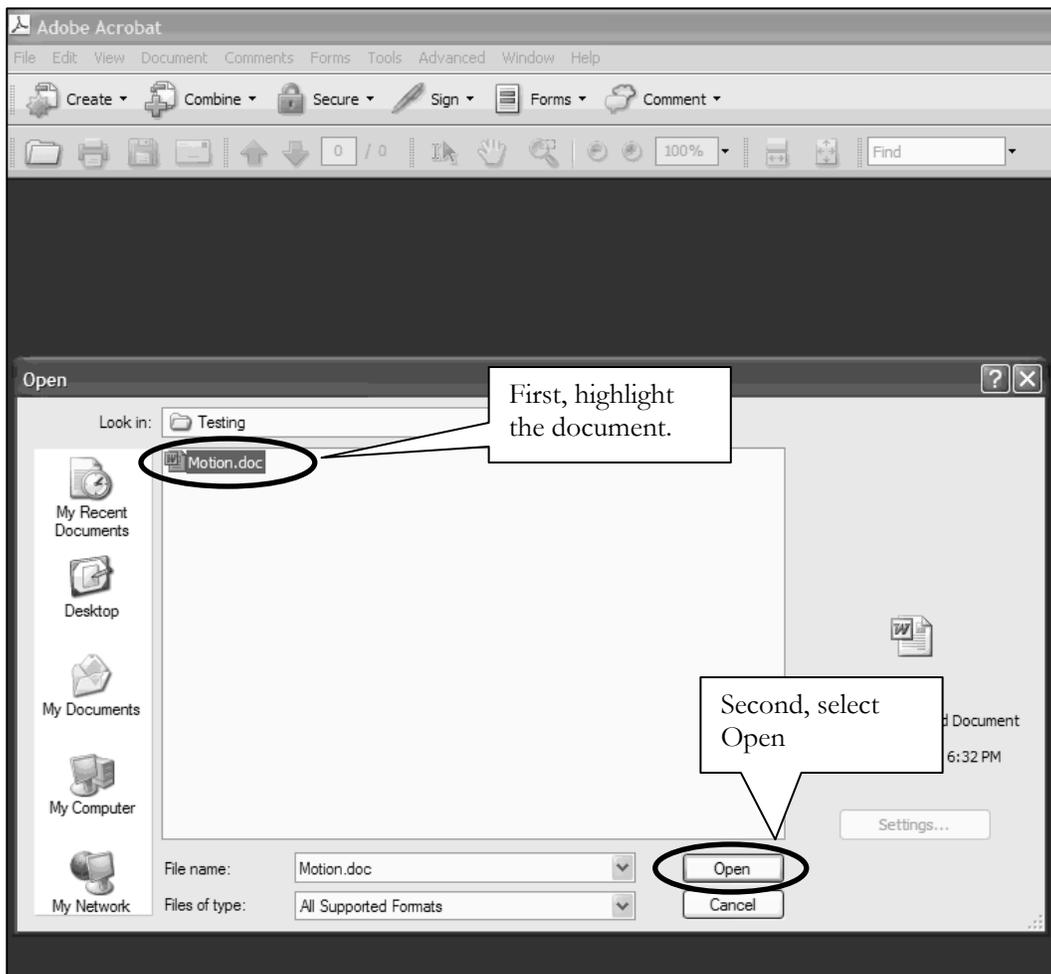
Figure 9: Create PDF

Figure 10: Converting to PDF

CREATING HYPERLINKS BETWEEN DOCUMENTS FILED IN THE SAME EVENT

It is also possible to link two or more documents to be filed in the same event (e.g., create a hyperlink in the main document to an attachment) even when those documents were not filed previously in CM/ECF. To create a hyperlink to a document filed in the same docket event, such as an exhibit in support of a motion or memo of law, follow the steps below. Again, the proper method for inserting these hyperlinks depends on whether you use WordPerfect or Word to create your document.

> **NOTE**: **Hyperlinks in a primary document to a secondary document filed in the same submission do not vitiate the requirement that each exhibit or attachment to a motion or pleading (i.e., primary document) must also be filed as a separate attachment and individually numbered/lettered.**

WORDPERFECT

In order to create a hyperlink in the primary WordPerfect document to a secondary document filed in the same event, the secondary document must be in PDF format.

STEP 1   Convert the secondary document (i.e., the attachment) to PDF format using the **Publish to...** or **Publish to PDF** function in WordPerfect. Converting to PDF using other methods will <u>not</u> retain the hyperlink (Figure 11). With the secondary document open in WordPerfect, do the following:

- Click **File** on the menu toolbar
- Select **Publish to...** then **PDF** or **Publish to PDF** (this selection depends on the version of WordPerfect you are using).
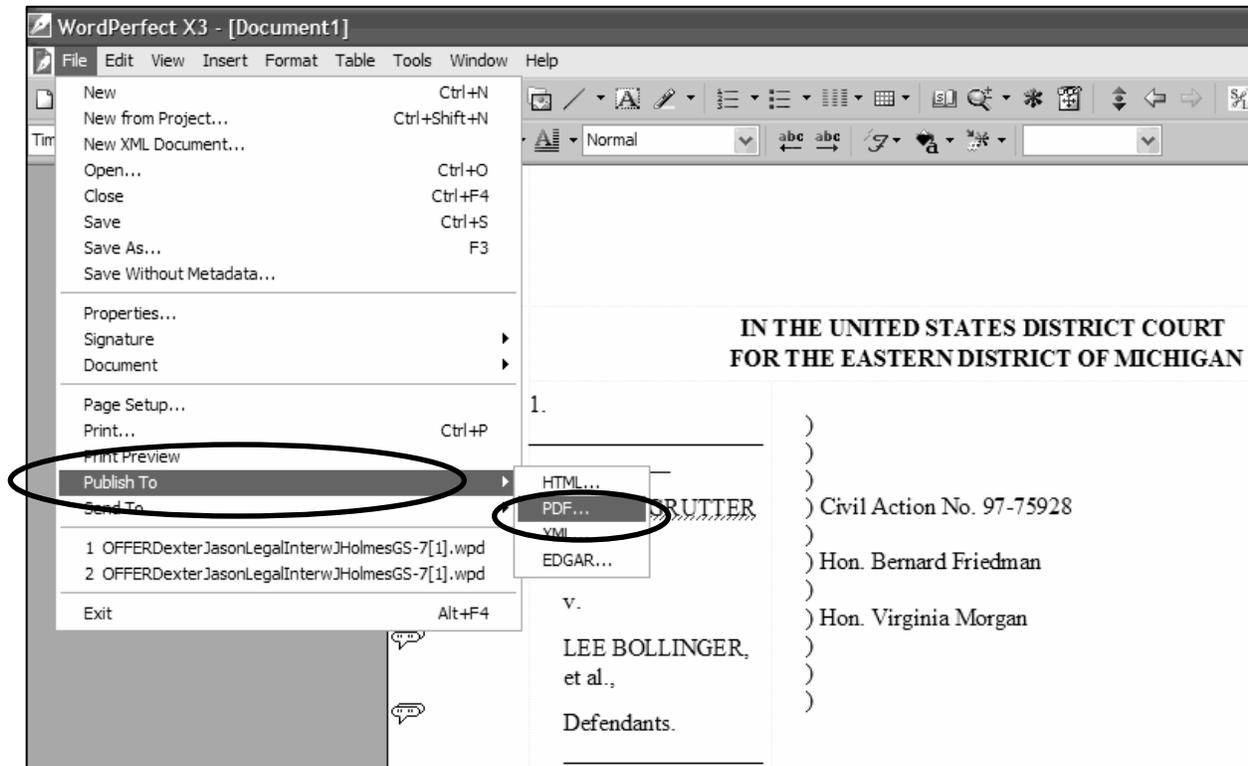

Figure 11: Publish to PDF

STEP 2   Open the primary WordPerfect document that will contain the hyperlink to the secondary document.

STEP 3   In the primary document, select and highlight the appropriate text that will be displayed as the hyperlink to the secondary document (Figure 12).

- **Select the text** to be displayed as a hyperlink.
- Click **Tools** on the menu toolbar.
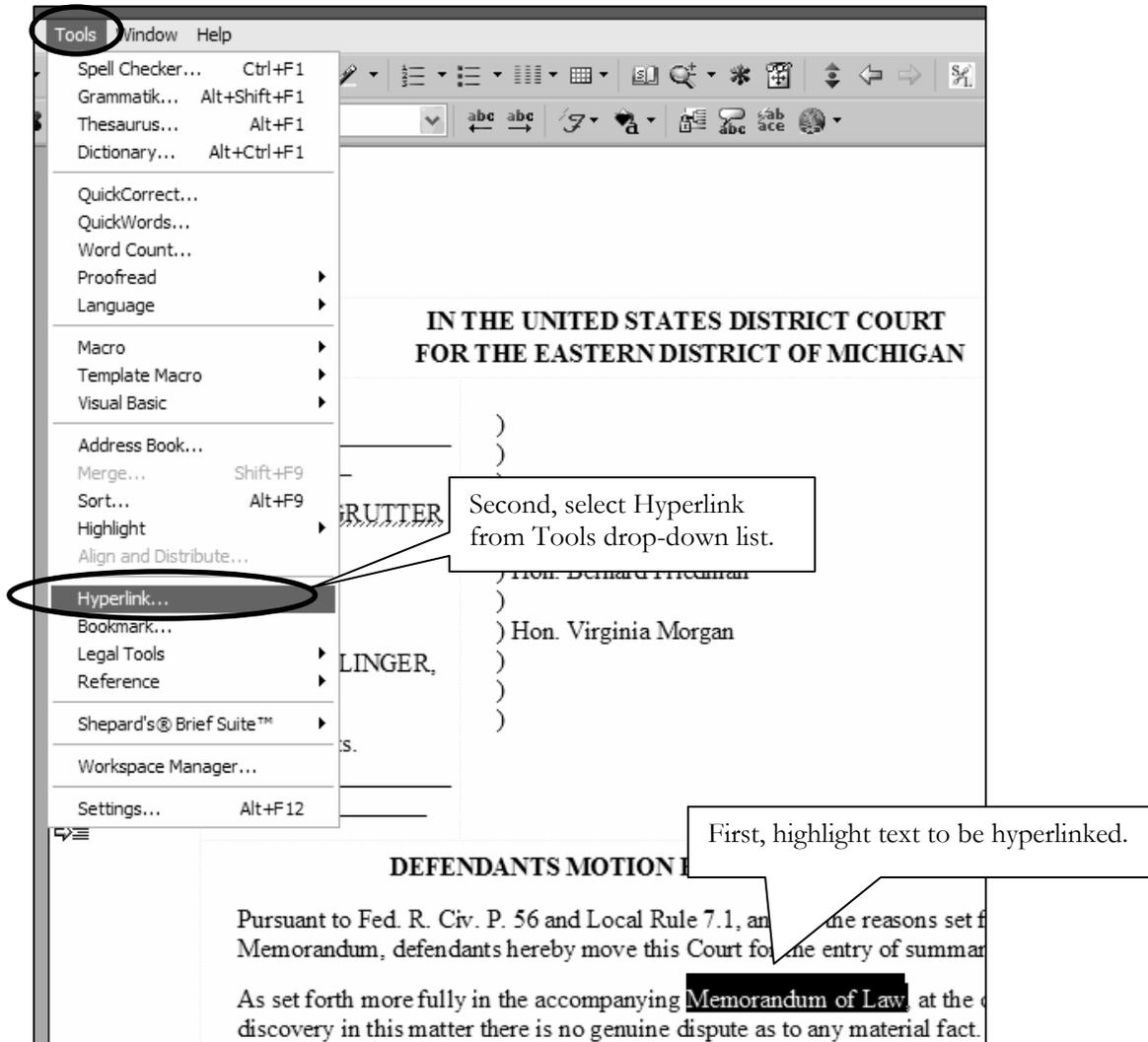- Select **Hyperlink** from the drop-down list.

Figure 12: Highlight Text to Create the Hyperlink

STEP 4   Displayed next is the Hyperlink Properties dialog box. Click the Folder icon located to the right of the Document/Macro field as shown in Figure 13.
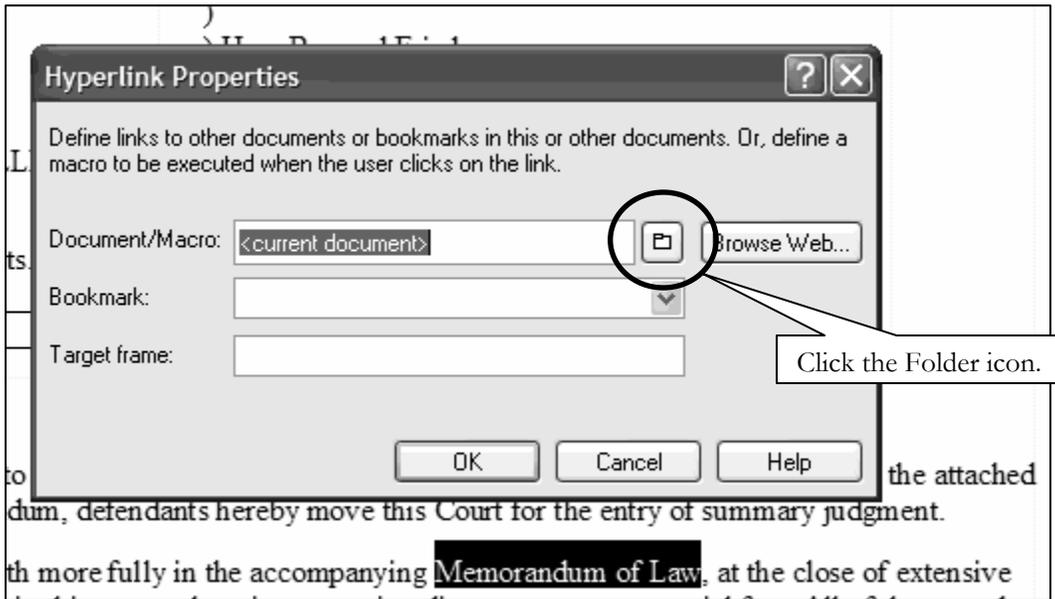

Figure 13: Creating Hyperlink to Secondary Document

STEP 5   Navigate to the directory/folder in which the secondary document you wish to link to is located (i.e., the local path name) (Figure 14). *NOTE*: The document selected as the link must be in PDF format.

- **Highlight** the **PDF document** (document must be in PDF format).
- Click the **Select** button
- Click **OK** on the **Hyperlink Properties** dialog box. The hyperlinked text will be underlined.

NOTE: Users may append to the URL a citation to a specific page number within the document, if necessary. To do this, enter **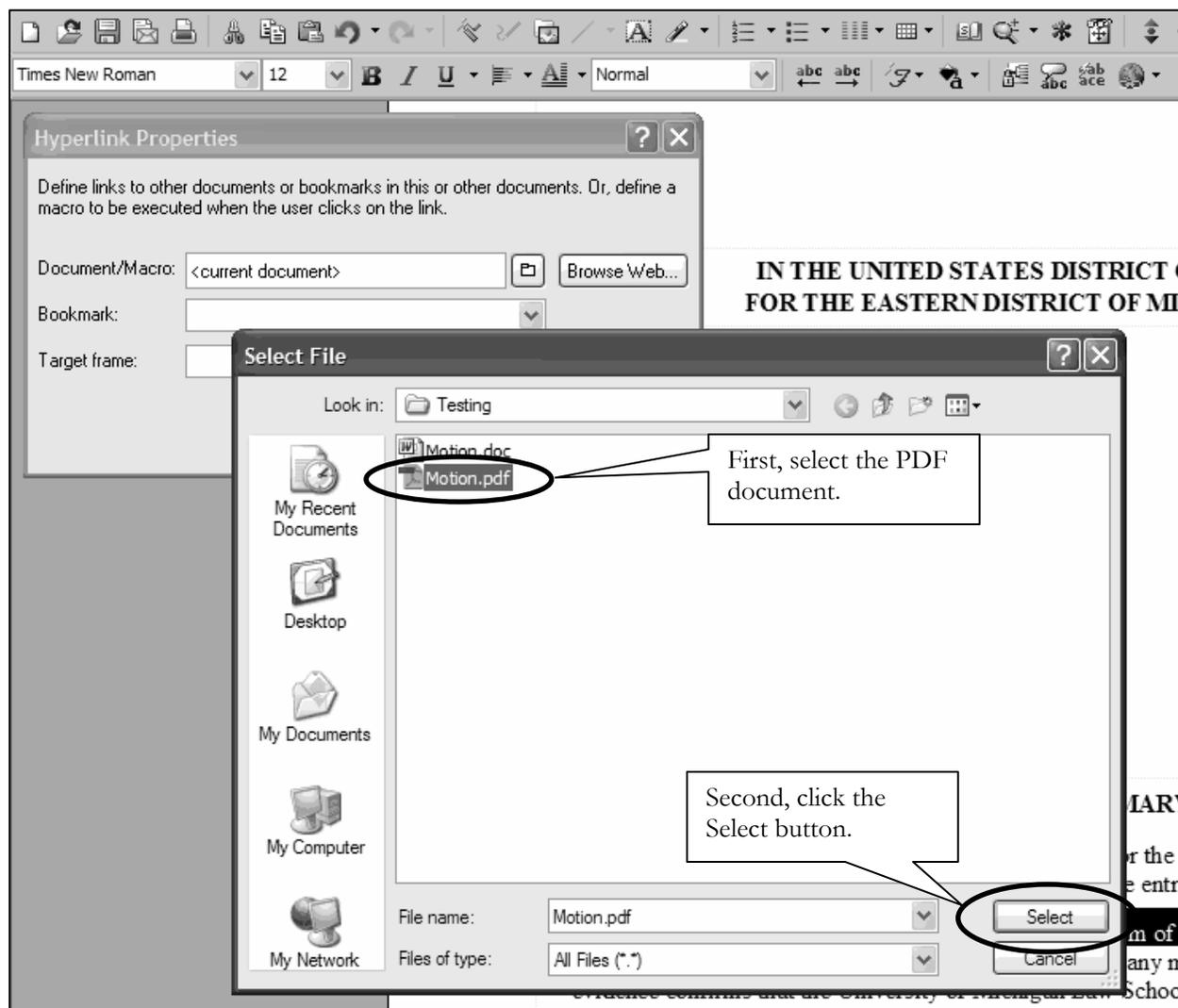?page=<page number>** at the end of the URL, for example, **http://usdc.uscourts.gov/doc1/00103032?incHeader=y?page=23**.

Figure 14: Linking Document

STEP 6   After you have created all of your document hyperlinks, save the primary WordPerfect document.

STEP 7   Convert the primary document to PDF format using the **Publish to...** or **Publish to PDF** function in WordPerfect. Converting to PDF using other methods will <u>not</u> retain the hyperlink (Figure 15).

- Click **File** on the menu toolbar
- Select **Publish to...** then **PDF** or **Publish to PDF** (this selection depends on the version of WordPerfect you are using).
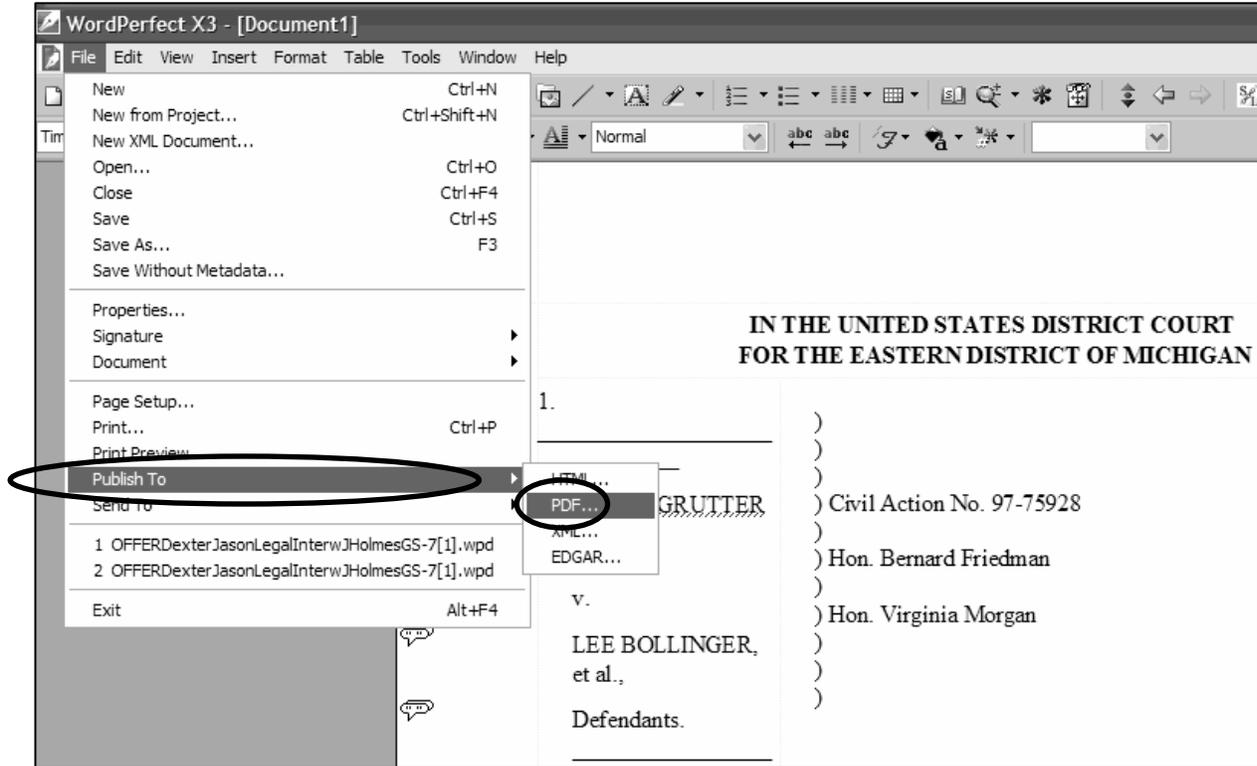

Figure 15: Publish to PDF

STEP 8   Docket the appropriate CM/ECF event and upload the primary PDF document and attachments as usual.

MICROSOFT WORD

In order to create a hyperlink in the primary Word document to a secondary document filed in the same submission, the secondary document must be in PDF format.

STEP 1   Convert the secondary document (i.e., the attachment) to PDF format. To convert a Word document to be filed in the CM/ECF system to PDF format that contains a hyperlink, the Adobe Acrobat application <u>must be</u> used. No other conversion software can be used.

- Click the Convert to Adobe PDF icon on your menu toolbar or Adobe PDF button depending on the version of Word you are using (Figure 16).
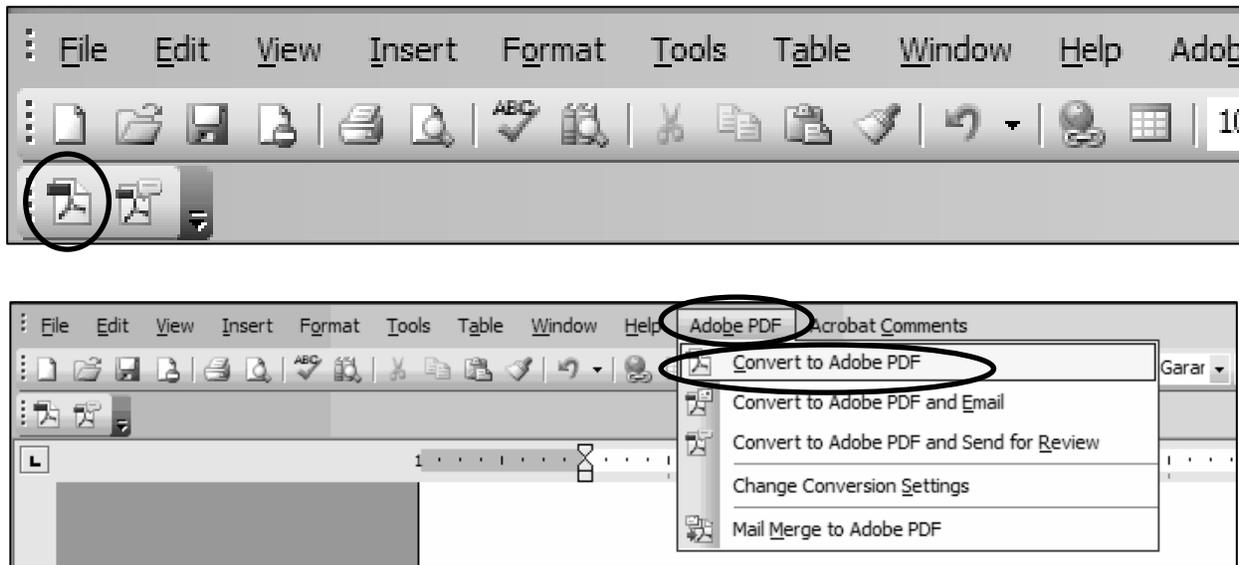

Figure 16: Microsoft Word menu toolbar

<u>OR</u>

- Close the Word document.
- Open Adobe Acrobat.
- Click **File** on the menu toolbar (Figure 17).
- Select **Create PDF** then **From File** (Figure 17).
- Navigate to the appropriate directory/folder where the Word document is stored. Select the document and click the **Open** button as shown in Figure 18. A series of windows will open as the document is converted.

STEP 2   When the conversion is completed, the document is displayed in the Adobe Acrobat window. Save and close the Adobe file.
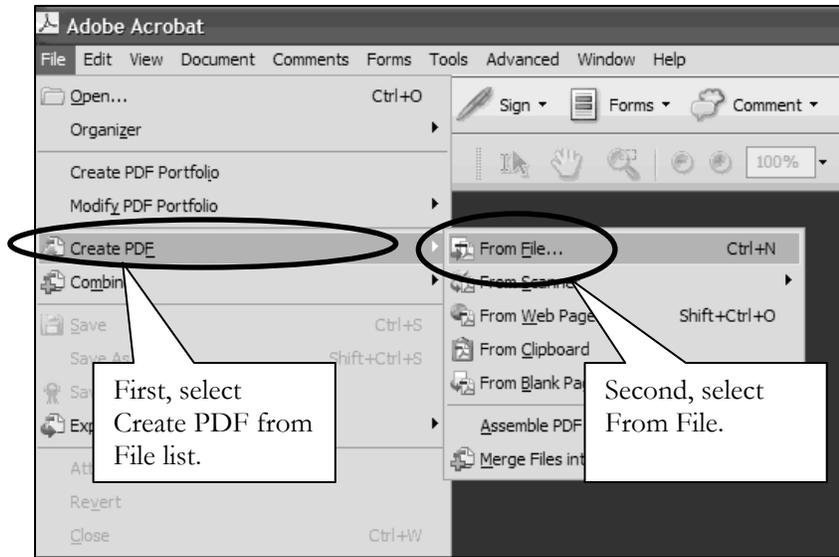
First, select Create PDF from File list.

Second, select From File.

Figure 17: Create PDF

First, highlight the document.

Second, select Open
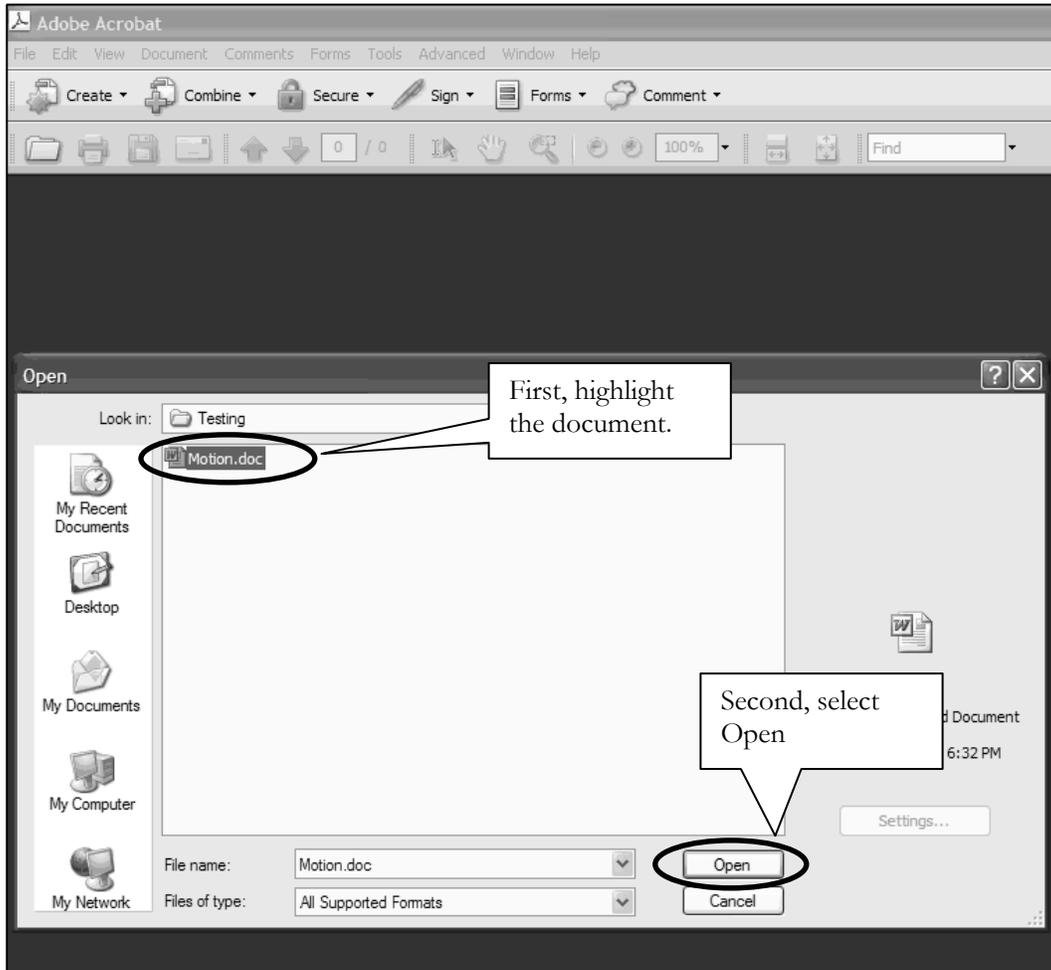
Figure 18: Converting to PDF

STEP 3   Open the primary Word document that will contain the hyperlink to the secondary
                  (attached) document.

STEP 4   In the primary document, select and highlight the appropriate text that will be displayed as
                  the hyperlink to the secondary document (Figure 19).

- Click **Insert** on the menu toolbar.
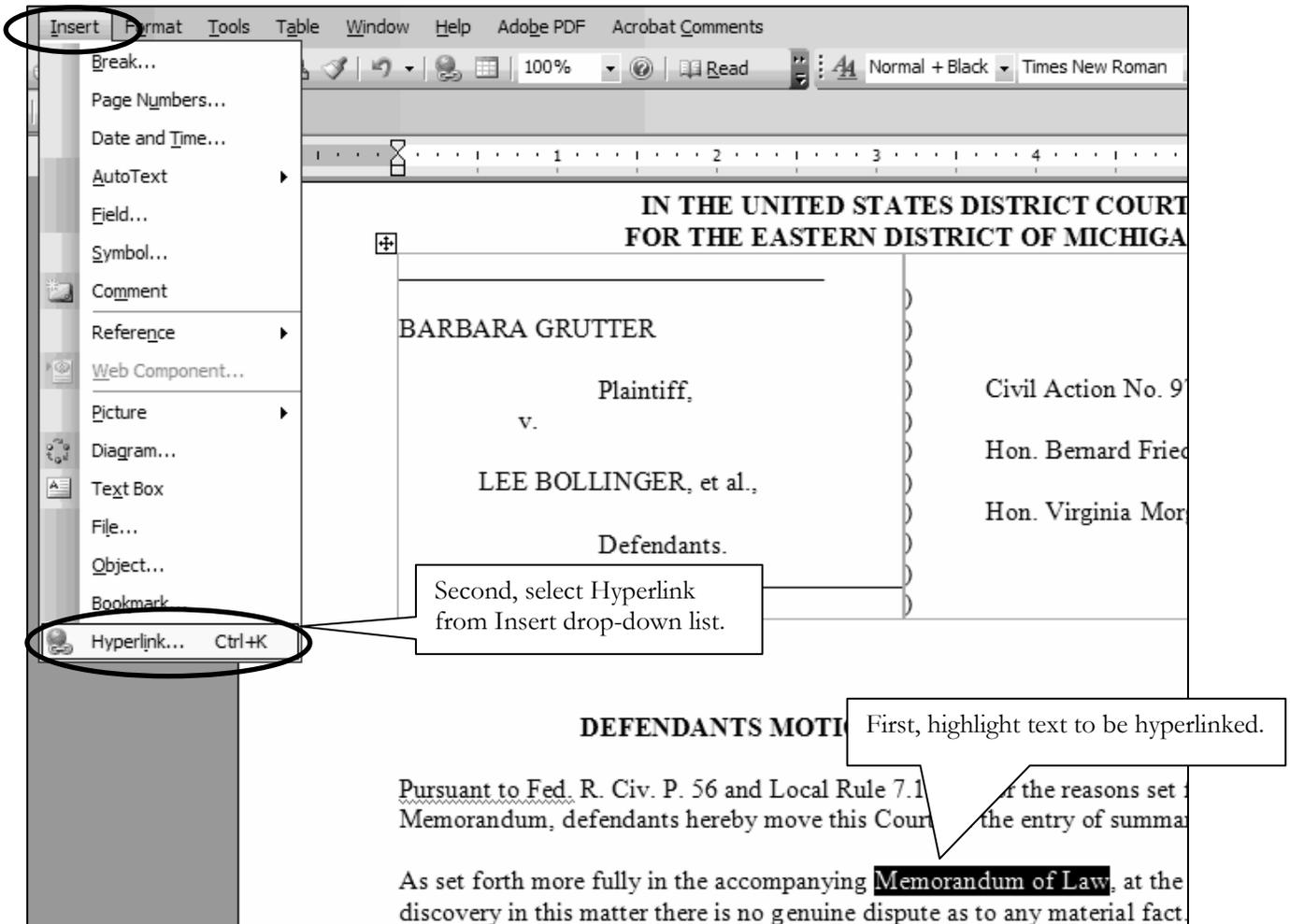- Select **Hyperlink** from the drop-down list.

Figure 19: Highlight Text to Create Hyperlink

STEP 5   Displayed next is the Insert Hyperlink dialog box as shown in Figure 20.
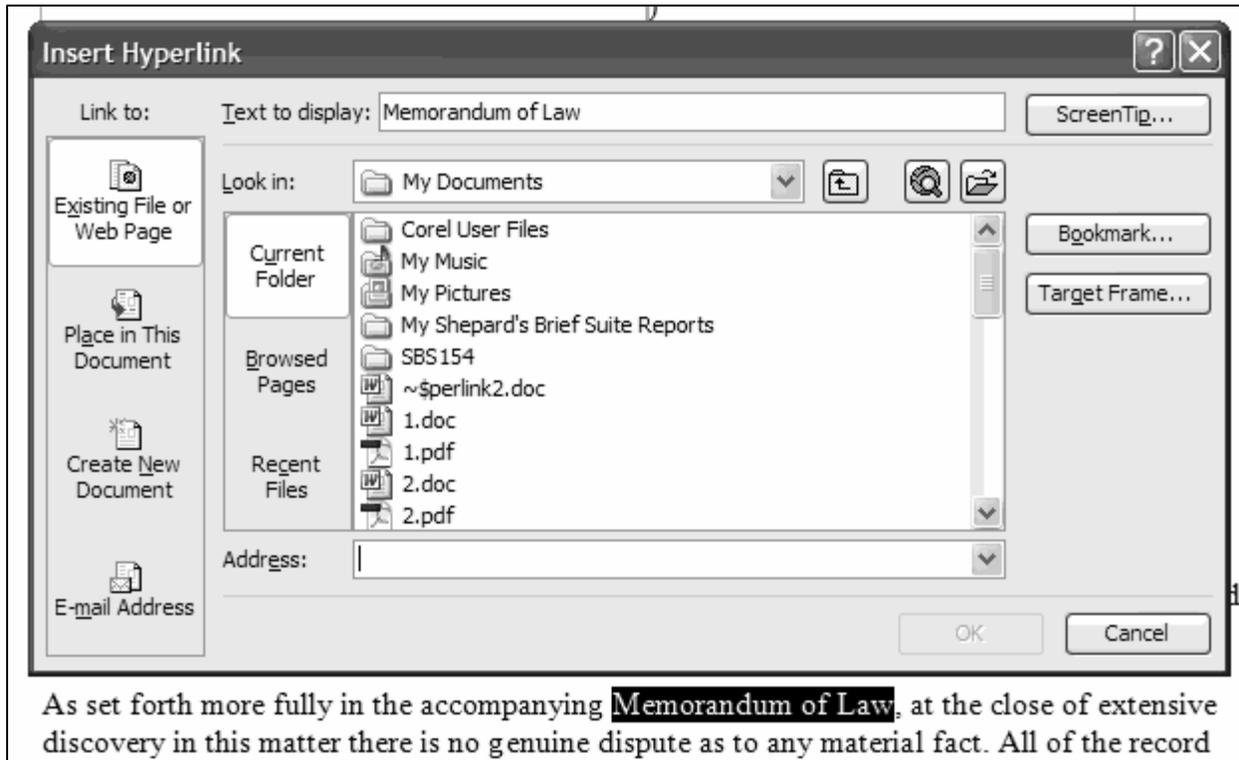

Figure 20: Creating Hyperlink to Secondary Document

STEP 6   Navigate to the directory/folder in which the secondary document you wish to link to is located (i.e., the local path name) (Figure 21). <u>*NOTE*</u>: The document selected as the link must be in PDF format.

- **Highlight** the **PDF document** (document must be in PDF format).
- Click **OK** on the **Insert Hyperlink** dialog box. The hyperlinked text will be underlined.

<u>**NOTE**</u>: Users may append to the URL a citation to a specific page number within the document, if necessary. To do this, enter **?page=<page number>** at the end of the URL, for example, **http://usdc.uscourts.gov/doc1/00103032?incHeader=y?page=23**.
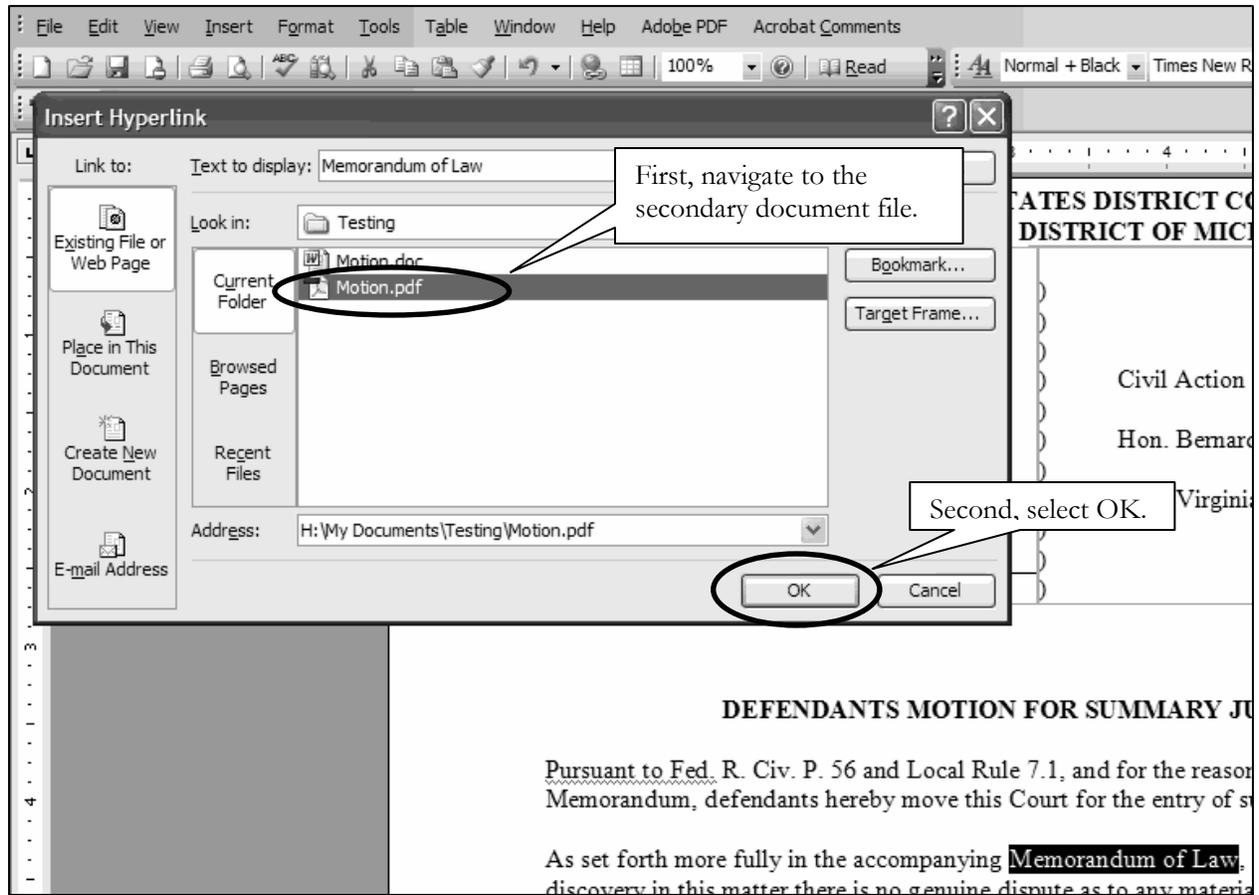

Figure 21: Linking Document

STEP 7   Save the primary Word document.

STEP 8   Convert the primary Word document to PDF format. To convert a Word document to be filed in the CM/ECF system to PDF format that contains a hyperlink, the Adobe Acrobat application <u>must be</u> used. No other conversion software can be used.

- Click the Convert to Adobe PDF icon on your menu toolbar or Adobe PDF button depending on the version of Word you are using (Figure 22).
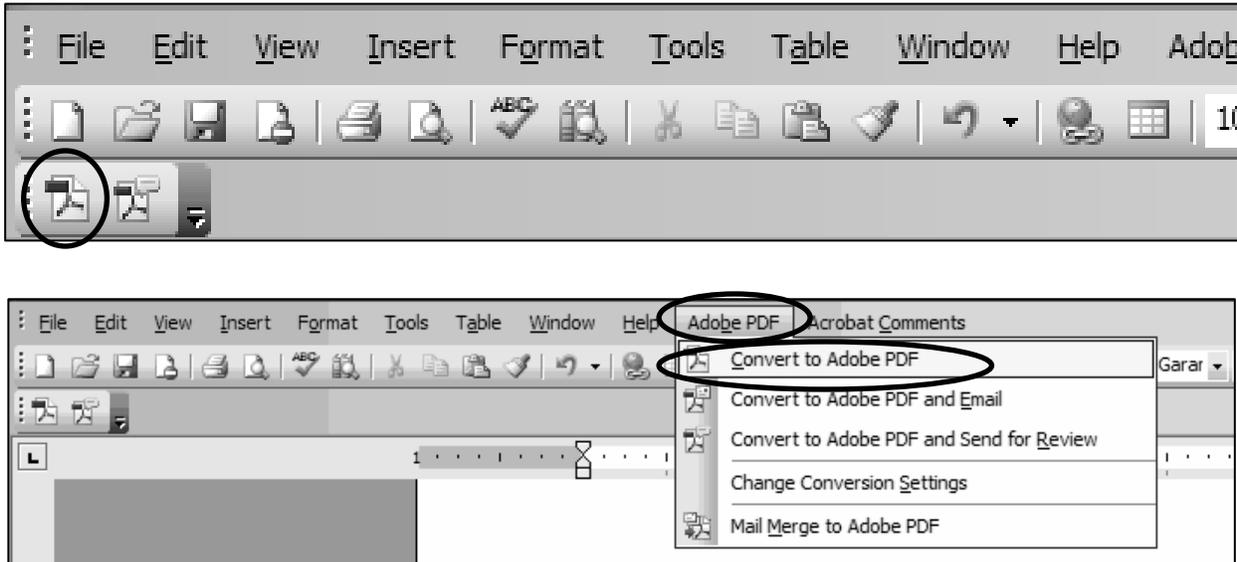

Figure 22: Microsoft Word menu toolbar

<u>OR</u>

- Close the Word document.
- Open Adobe Acrobat.
- Click **File** on the menu toolbar (Figure 23).
- Select **Create PDF** then **From File** (Figure 23).
- Navigate to the appropriate directory/folder where the Word document is stored. Select the document and click the **Open** button as shown in Figure 24. A series of windows will open as the document is converted.

STEP 9   When the conversion is completed, the document is displayed in the Adobe Acrobat window. Save and close the Adobe file.

STEP 10   Docket the appropriate CM/ECF event and upload the primary PDF document and attachments as usual.
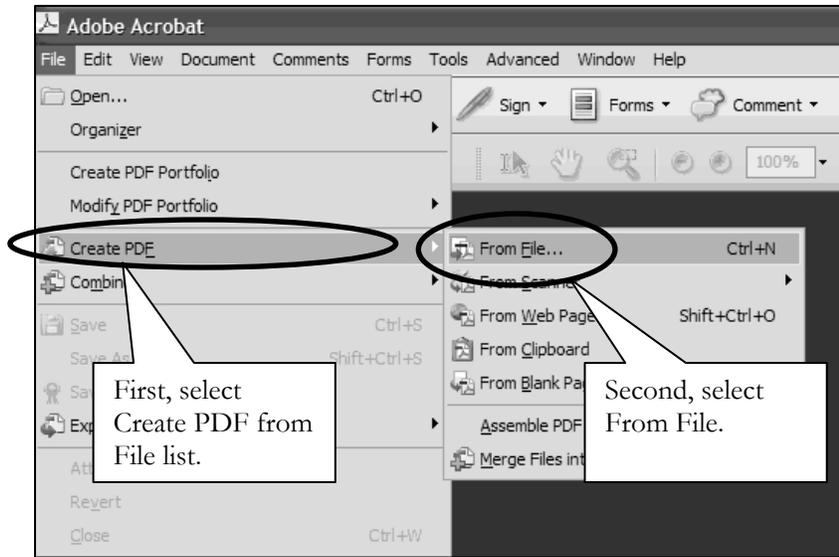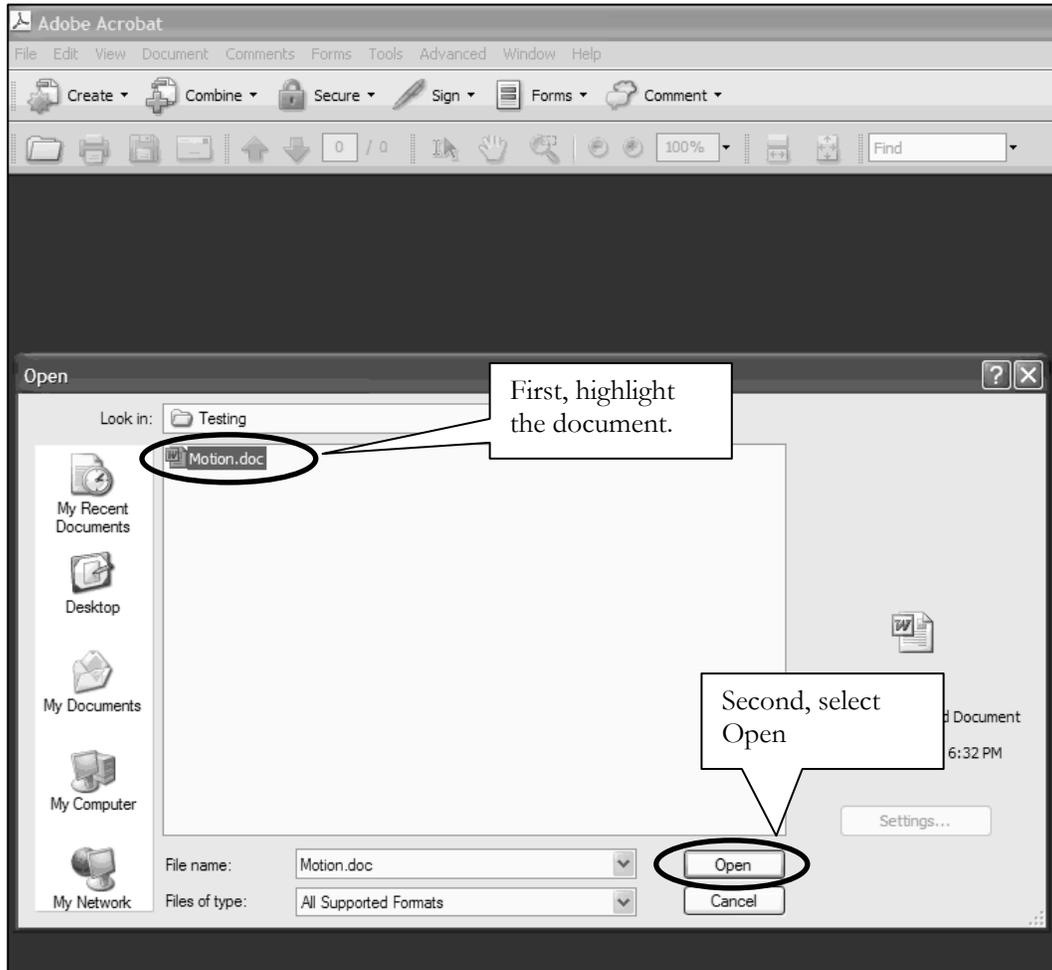
Figure 23: Create PDF

Figure 24: Converting to PDF

ACCESSING DOCUMENTS VIA HYPERLINKS

Accessing documents via a cross-document hyperlink works the same as when documents are accessed via a document number hyperlink in a report or query.

If a non-court user clicks on a hyperlink to a CM/ECF document but has not logged in to a CM/ECF server, a PACER log in screen is presented before the document can be displayed. Once a user has logged in to a CM/ECF server as a PACER user, this login ID will provide access to documents on other CM/ECF servers for the duration of the browser session or until the user logs out of the CM/ECF application. The billing receipt and confirmation will be displayed to users logged in with a PACER account before the document can be displayed.

Court users on the DCN can access unrestricted documents stored on an appellate court server via a hyperlink without logging in. Court users on the DCN must log in to a district or bankruptcy court server in order to access unrestricted documents via a hyperlink; a PACER log in screen will be presented to the court user if the document is stored on another court's server. The PACER login ID will provide access to documents on the other court's server for the duration of the browser session or until the user logs out of the application.

If a document is restricted for any reason, the user must log in to the server on which the document resides with a court or attorney login ID and have the appropriate access rights to the document. If a hyperlink to a restricted document is created in a document stored on anther server, the hyperlink will not access the document from the other server.

If the user does not have access rights to a document, or a document cannot be found, an applicable message will be displayed.

PACER BILLING SCENARIOS

When a PACER user accesses a document for the first time via the Notice of Electronic Filing, he/she will not incur fees for accessing the newly filed document, but access to any hyperlinked document from within the original document will incur a fee.

When a PACER user accesses a document after the first look, or accesses it from a docket sheet, he/she will be charged for the original document and any documents displayed when using a hyperlink.

If documents filed in the same transaction contain hyperlinks to each other, the free look will be available from the document number hyperlink displayed on the NEF document submenu, not from the hyperlinks in the document themselves. The following note was added to the document submenu screen: "*To view the main document and its attachments without incurring a PACER fee, click on the hyperlinks displayed on this menu. You will incur a PACER fee to view CM/ECF documents from hyperlinks within the documents.*"

If a PACER user does not have his/her PACER login already linked to his/her ECF login, he/she will be prompted for the PACER login for the first document he/she tries to view.