UNITED STATES DISTRICT COURT

for the

MIDDLE DISTRICT OF NORTH CAROLINA

GUIDE TO CREATING AND USING

CROSS-DOCUMENT HYPERLINKS IN CM/ECF

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Introduction

This Guide shows attorneys and their staff how to create hyperlinks in and between documents in CM/ECF. Filers can now file documents within CM/ECF that contain hyperlinks to a previously filed document in the same case, another case that resides on the CM/ECF system where the filing is being entered, or on any other court's CM/ECF system. In addition, filers can also link between documents that are filed simultaneously in the same event.

This Guide uses Word for illustrative purposes, but similar functionality is available for filers who use WordPerfect.

Benefits of Hyperlinking

Hyperlinking provides a number of benefits for both attorneys and the Court:

- For attorneys, hyperlinks can include links to legal authorities, and to other CM/ECF filings, adding an enhance level of persuasion, and quick, easy access to specific sections in the court record.
- For judges, hyperlinks allow the Court to more easily review case law and case findings, verify arguments and read the text of a cited case or relevant document within CM/ECF without navigating through multiple screens and sites.

Types of Permissible Hyperlinks

- Links to another location within the same document.
- Links to documents previously filed in CM/ECF cases in the NCMD or from any other federal court.
- Links to an attachment to the document being filed in the same event.
- Links to case and statute citations.

Types of Prohibited Hyperlinks

- Hyperlinks to personal websites, including law firm websites.
- Hyperlinks to a restricted document (e.g., a private entry, sealed document) can only be utilized by users with appropriate access permission.

Hyperlink Functionality

- After a document is filed in CM/ECF, that document will be available to be linked as a hyperlink in a subsequently filed document. This allows a filer to reference previously filed material to their newly filed document.
- Hyperlinks can also be added that link between documents in the same event, such as a brief and attachments, then filed simultaneously in CM/ECF.
- If a case or document within a CM/ECF filing 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 due to technical failures, an error message will be displayed.
- Users should not copy hyperlinks from Notices of Electronic Filing (NEF's). Users should run a report in CM/ECF, such as a docket sheet, and copy the document number hyperlink from the report. See instructions below.

Creating Hyperlinks to Documents Previously Filed in CM/ECF

Creating hyperlinks to previously filed documents requires copying the URL (Uniform Resource Locator) of a specific document or specific page and then creating a hyperlink within another document by pasting the URL into the text, thereby "linking" the two documents.

Overview of the Process for Creating a Hyperlink to a Previously Filed Document

- Open the document in Word that you want to create the hyperlink to.
- Create a hyperlink in Word by selecting and highlighting the text within the document you plan to file.
- Access CM/ECF and run the docket report for the case that contains the entry you want to link to.
- Locate the document among the docket entries and right click on the document link which is represented by a number with an underscore (e.g. 435).
- Copy the URL of the document to the Windows clipboard.
- Paste the URL into the document you are preparing to file.
- Test the hyperlink for functionality.
- Convert the document to PDF.
- File the document in CM/ECF.

Here are step by step instructions of the hyperlink process:

Step One: Highlight the Text in the Document

Create or open the document in Word you plan to file that has the text you want to add a hyperlink to. Highlight the text. In the example below, the reference to the exhibits filed with Duke's brief "indexed at Doc. 438-1" should be highlighted by dragging over the area or pointing to the beginning and end of the text.

"This brief makes use of the exhibits filed with the Court in support of Duke's Motion *in Limine* under the Federal Rules of Evidence (indexed at Doc 425-1), exhibits filed with Duke's Brief in Opposition to Plaintiffs' Motion for Summary Judgment (<u>indexed at Doc. 438-1</u>), and exhibits filed with Duke's Reply in Support of Motions *in Limine* and Motion for Summary Judgment (indexed at Doc. 440-1)."

Step Two: Copying URL of the Document

Sign onto CM/ECF and run the docket sheet for the case that contains the document you want to hyperlink to. Listed below is an example of a hyperlink created to the exhibit filed in the brief previously filed in CM/ECF. You will copy the URL from the document link to the Word clipboard, and then later paste it into the document you are preparing to file. To do this, hover your cursor over the attachment link in this case #438-1, and right click your mouse button on the document number for Attachment # 1.
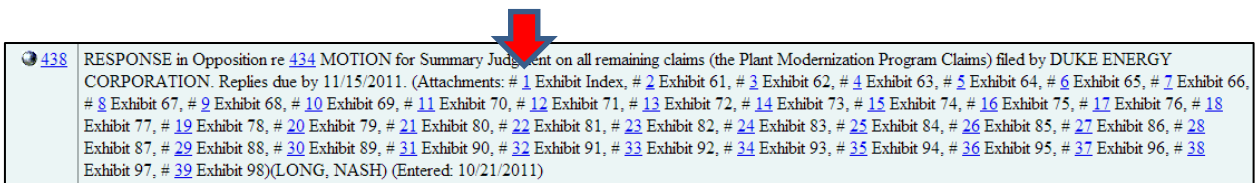

A menu will appear with the Copy Shortcut option.
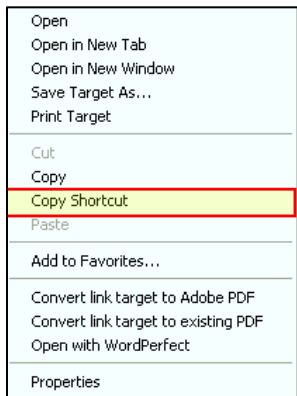
When you select Copy Shortcut, Windows will copy the URL for document 438-1 to the clipboard, storing it so you can paste it in at a later step.

Step Three: Open the Hyperlink Dialogue Box

Go to the document that you want to create the link to and make sure the citation text is still highlighted. To make this text into a hyperlink, select the INSERT tab from the Word Ribbon (or as an alternative, right click on the highlighted text and select the word Hyperlink).
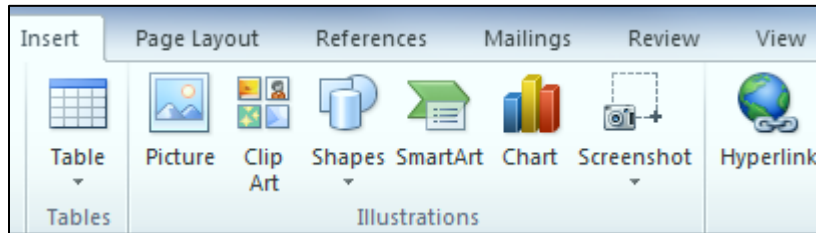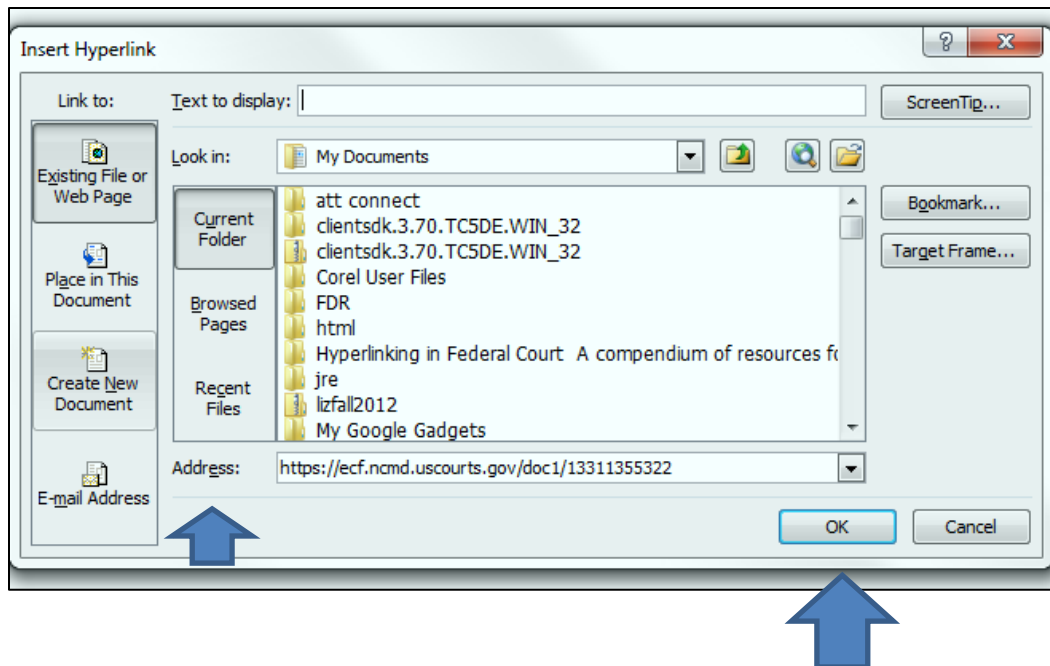
Select HYPERLINK from drop down menu:
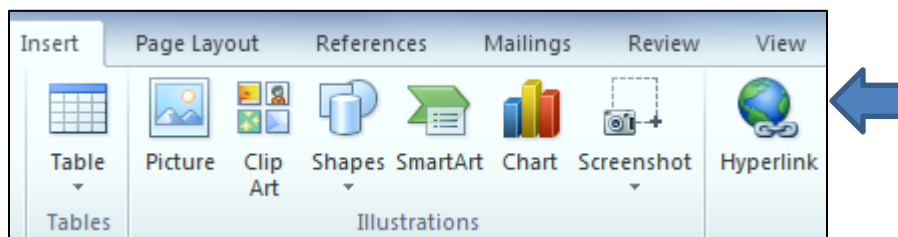
Step Four: Copying the URL into the Hyperlink Dialogue Box

Paste the URL that Windows copied earlier into the address field by moving to the address field in the bottom of the box and press CTRL+ V (or right click on the box and select paste) to paste the URL into the address field. Next, press OK to advance.

When you return to your document page, you will see the text highlighted in blue and underlined indicating that the hyperlink has been created. You can now save the document in Word, preserving the hyperlink.

Example:

> "This brief makes use of the exhibits filed with the Court in support of Duke's Motion *in Limine* under the Federal Rules of Evidence (indexed at Doc. 425-1, exhibits filed with Duke's Brief in Opposition to Plaintiffs' "Motion for Summary Judgment (indexed at Doc. 438-1), and exhibits filed with Duke's Reply in Support of Motions *in Limine* and Motion for Summary Judgment (indexed at Doc. 440-1)"

Step Five: Checking Hyperlink Functionality

To check the hyperlink's functionality, hover over the highlighted hyperlink and you will be prompted to press Control-Click on the highlighted hyperlink. You will be directed to the document you have linked to. Once you have reviewed the document, you should close it by selecting the X in the upper right corner.

Note: Do **NOT** use the back button.

Step Six: Converting the Document to PDF

All documents filed in CM/ECF are in PDF format, so all documents created for filing must be converted to a PDF document. To include hyperlinks in your filed documents, place all the links into the document using your word processing system <u>before</u> converting the document to PDF format. Click File on the tool bar and the following box will appear. Select: Save as Adobe PDF.
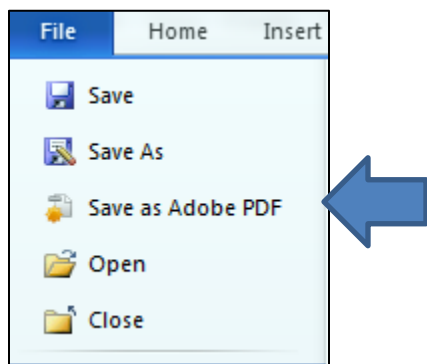
Note: Do **NOT** use **Print to PDF** to create a PDF of the document with hyperlinks - the hyperlinks will be lost. Do **NOT** print the document and scan it to PDF format.

Step Seven: Docket in CM/ECF

You are now ready to docket the document with hyperlinks in CM/ECF. Go to CM/ECF, select the appropriate event to file and docket as usual.

Creating Hyperlinks Between Documents in the Same Filing

It is possible to link two or more documents within 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. This functionality enables the filer to relate references in different documents during production, and then file all documents at the same time. For example, you can create hyperlinks between your main document and an attachment, and then file the separate documents simultaneously. The filer must initially store the secondary document in a folder on their hard drive or network drive before hyperlinking and filing.

When you create the link, it points to the referenced document where it exists on your local system or network and when the documents are filed in CM/ECF, the link is converted to an *"address"* in CM/ECF.

Overview of the Process for Creating a Hyperlink in the Same Filing

- Create the secondary Word document(s) (i.e., the attachment) to which the main document will be linked and ensure the secondary document(s) is in PDF format.
- Create the main document (i.e., the document that will have the hyperlink to the secondary document) in Word.
- Select the text in the main document that will be displayed as the hyperlink.
- Open the Insert Hyperlink dialogue box in Word.
- Navigate to the folder in which the secondary document you wish to link to is located.
- Select the PDF file to be linked.
- Test the hyperlink for functionality.
- Save the Word document.
- Convert the Word document to PDF.
- Perform CM/ECF docketing. Upload the main document with hyperlinks and the PDF attachments.

Step One: Ensure Each Secondary Document is in PDF Format

If a secondary document is not already in PDF format, convert the document to PDF format.

This is an example of text from an attachment marked as Exhibit 8 that will be linked when referenced in the main document (brief).

> Exhibit 8: Listed below are types and dates of service calls for PMP pumps:
>
> I. Cleaning: 1/2/99
> II. Motor repair: 2/3/99

Step Two: Open the Main Document and Select the Text

Open the main document (i.e. the document that will have the hyperlink to the secondary document) in Word.

Select the text in the main document that will be displayed as a hyperlink. Highlight the text by dragging over the area or pointing to the beginning and end of the text.
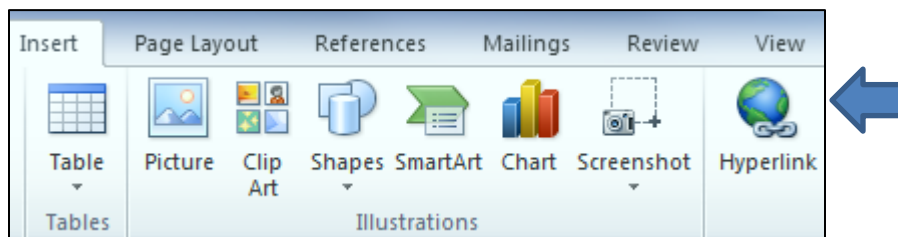
Example:

> "The service records are attached as **Exhibit 8:** Duke also provided the NCUC with specific details about the problems with the PMP units that rendered them inoperable. Allen 1 and 2 were unable to operate "at all" without "modifications and upgrading" to the boilers, turbines and generators."

Step Three: Open the Hyperlink Dialogue Box

To make this text into a hyperlink, select the INSERT tab from the Word Ribbon (or as an alternative, right click on the highlighted text and select the word Hyperlink).
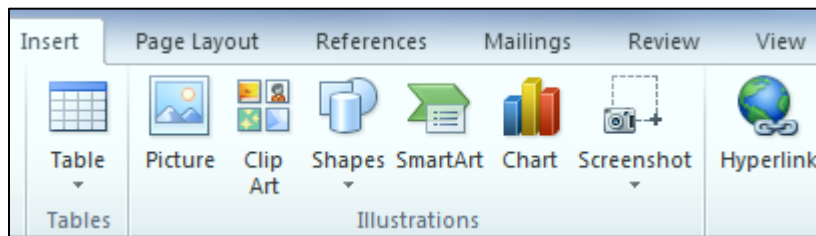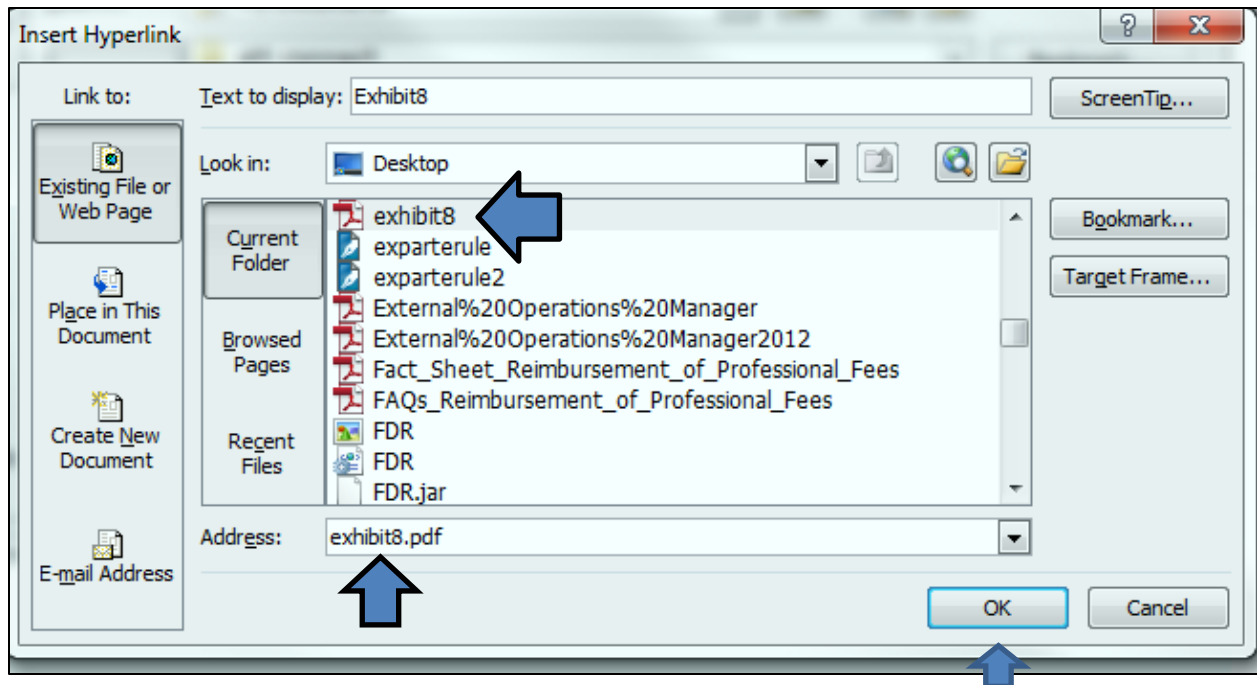

Select HYPERLINK from drop down menu:

Step Four: Locate and Select the PDF File in the Hyperlink Dialogue Box

Navigate to the folder in which the PDF document is located. Select the file and the name of the selected file will be displayed in the address field.

Click the OK button and the dialogue box will close.

The hyperlink will be underlined and in blue as shown in the example below:

"The service records are attached as Exhibit 8: Duke also provided the NCUC with specific details about the problems with the PMP units that rendered them inoperable. Allen 1 and 2 were unable to operate "at all" without "modifications and upgrading" to the boilers, turbines and generators.""

Step Five: Checking Hyperlink Functionality

To check the hyperlink's functionality, hover over the highlighted hyperlink and you will be prompted to press Control-Click on the highlighted hyperlink. You will be directed to the document you have linked. Once you have reviewed the document, you should close it by selecting the X in the upper right corner. **Note:** Do **NOT** use the back button.

You can now save the document in Word, preserving the hyperlink.

Step Six: Converting the Document to PDF

All documents filed in CM/ECF are in PDF format, so all documents created for filing must be converted to a PDF document. To include hyperlinks in your filed documents, place all the links into the document using your word processing system <u>before</u> converting the document to PDF format.
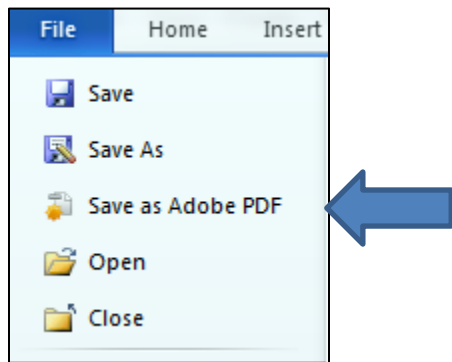
Note: Do **NOT** use **Print to PDF** to create a PDF of a document with hyperlinks- the hyperlinks will be lost. Do **NOT** print the document and scan it to PDF format.

Step Seven: Docket in CM/ECF

You are now ready to docket the main document and attachments in CM/ECF. Go to CM/ECF and select the appropriate event to file. For our example, go to Civil, Other Document and then Brief. Select the main document with hyperlinks as the main document. Locate and select your attachment(s). You should select a category (e.g. Exhibits) and enter a description. Complete the docketing process as usual.

Other Documents
1:09-at-01000 Plaintiff1 V Defendant1

Date document filed (mandatory)
| 6/23/2014 | Calendar |

Select the pdf document and any attachments.

Main Document
| \\VS-GBOFS1\Data\Users Data\Scott Cr | Browse... |

Attachments		**Category**	**Description**	
1. \\VS-GBOFS1\Data\Users Data\Scott Cr	Browse...	Exhibit ⌄	Service Records	Remove
2.	Browse...	⌄		

| Next | Clear |