Guide to Creating Electronic Documents/Filings

I. Briefs/ Original Proceedings

II. Record on Appeal/ Exhibits

III. Hyperlinking

California Courts of Appeal

11/01/2017

Introduction

This guide was created to help filers provide working electronic documents to the Courts of Appeal and the Supreme Court in California. While there are other products that can produce the same result, this guide focuses on Word (2007, 2010 and 2013) and Adobe Acrobat Pro XI. Some of these steps may be similar in other programs.

Be sure to check all rules with the court you are filing with to make sure you have met all their requirements and local rules for electronic documents.

I. Creating Electronic Appellate Briefs, Original Proceedings, etc.

A. Format

Check with the court's website that you are filing your document(s) with to ensure that you meet their requirements or guidelines for formatting.

B. Tools

Word processor

The primary tool for creating an electronic brief or original proceeding is your word processor. Microsoft Word provides some helpful features that make creating an electronic document easier. In particular, Word's Styles feature (see *Generating Bookmarks* below) allows you to create headings in your brief that will automatically create bookmarks when you *convert* the document as a PDF.

Adobe Acrobat Pro

Adobe Acrobat sets the standard for creating, combining, editing, redacting and making PDFs searchable. Eventually you will need to do all of these things if you are working with electronic documents. There are other less expensive PDF software programs, but you will find a variety of resources to assist you with Adobe Acrobat. For example, Adobe hosts a free Acrobat for Legal Professionals Blog that provides tips and techniques for working with electronic legal documents.

C. Basic Steps

1. Save or convert your document from the original word processing document, such as Word, directly to PDF (do not scan the document to create a PDF).
2. Create bookmarks[1] from the Table of Contents.
3. Redact any information that must be redacted under the rules. (See *Redacting*.)
4. Make text-searchable.

You can skip step 3 above if your document does not contain any information that must be redacted.

[1] Bookmarks are a fast and easy way to quickly navigate to different parts of a document and are required by the California Supreme Court and all Courts of Appeal.

D. Pagination

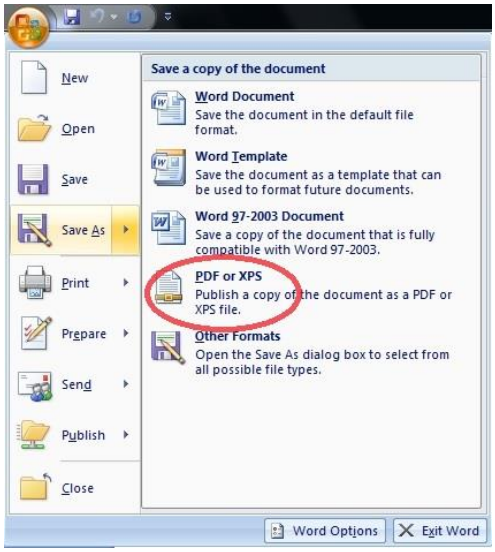
Before saving/converting the document as a PDF, make sure to number the pages consecutively *beginning with the cover page of the document*, using only the Arabic numbering system, as in 1, 2, 3, with a number on every page. Do *not* use a separate pagination system for tables within the document and the page number does not need to appear on the cover page and can be suppressed.

1. Saving/Converting directly to PDF

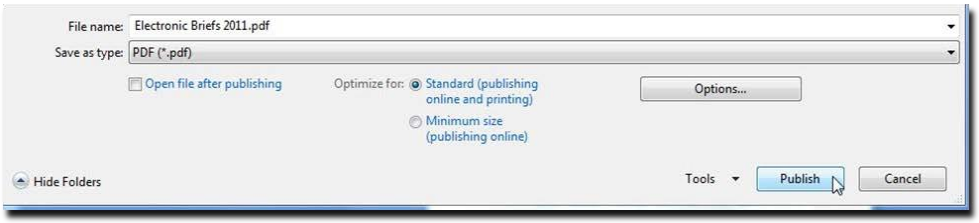
Word 2007 (without Adobe Acrobat Pro installed)

Click the Microsoft Office Button in the top left hand corner of Word.

Choose **Save As** and **PDF or XPS** (see below).

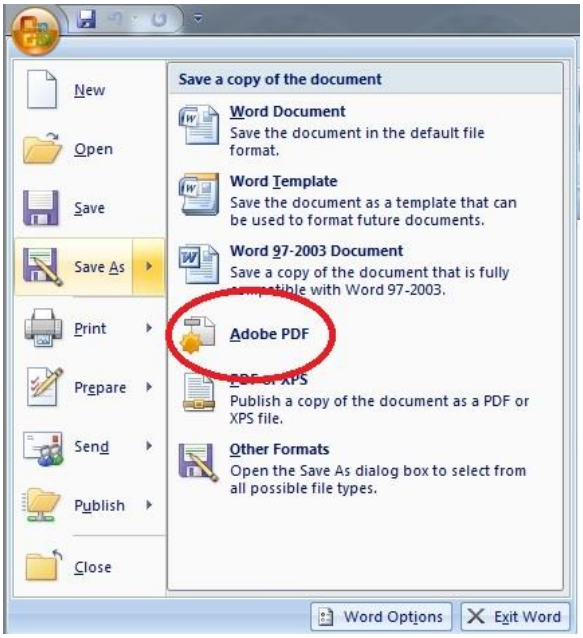


In the dialog box that appears, click the button in the lower right hand corner that says **Publish**.

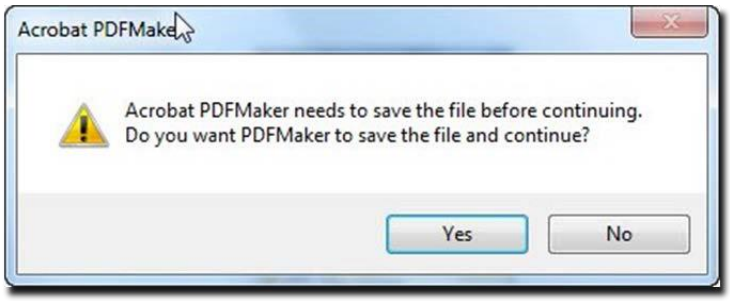


Word 2007 (with Adobe Acrobat Pro installed)

Choose **Save As** and **Adobe PDF** (see below).

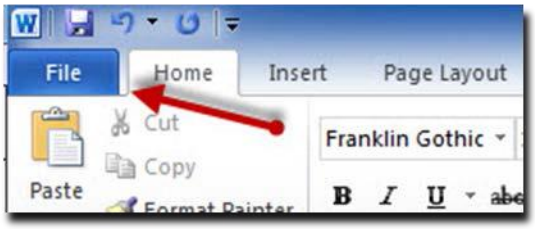


When the box below appears, choose **Yes**.

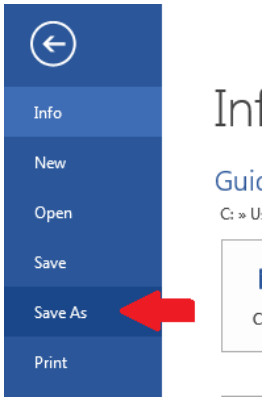


Word 2010 and 2013

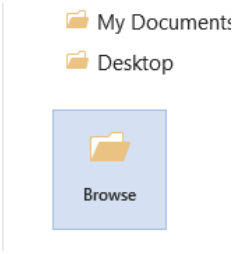
Click on the **File** tab.



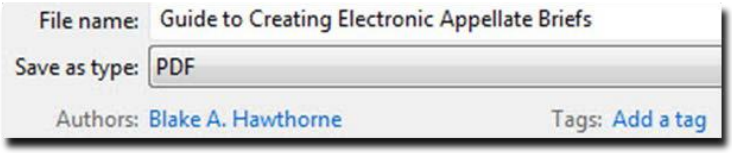
Choose **Save As**.



Click **Browse**



In the dialog box that appears, choose the Save as type = PDF.



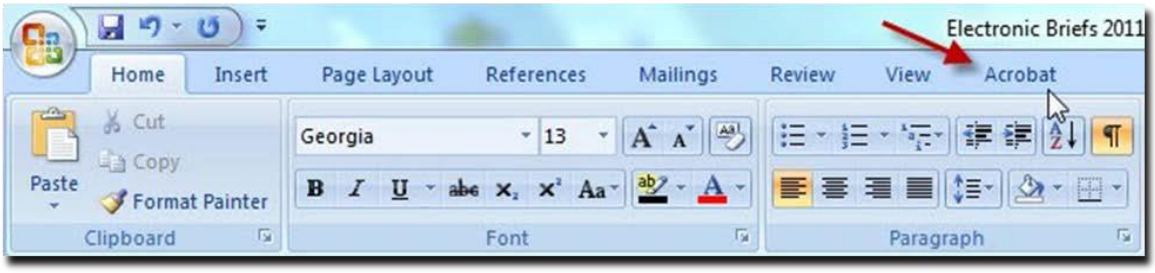
Click **Save**.

Adobe Acrobat Ribbon in Word

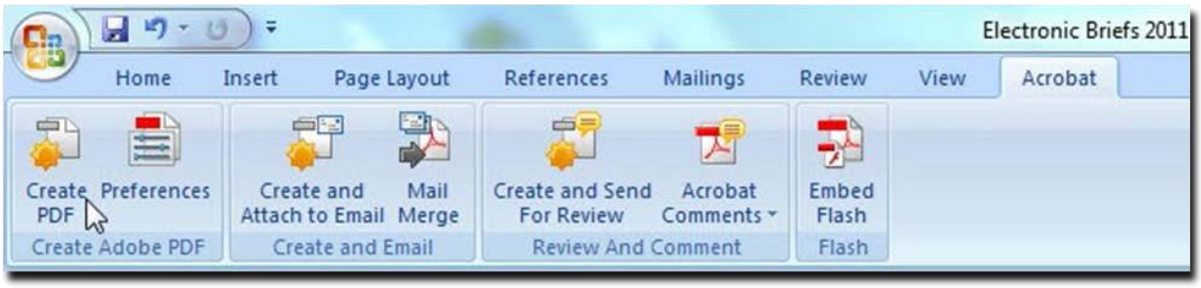
When you install Adobe Acrobat, the installer may add Acrobat buttons or menu commands to Microsoft Office applications (e.g., Word, Excel, PowerPoint).

The advantage of using the Acrobat Ribbon to create PDF from Word is that it will automatically create bookmarks for your document if you have used Word's Styles feature.

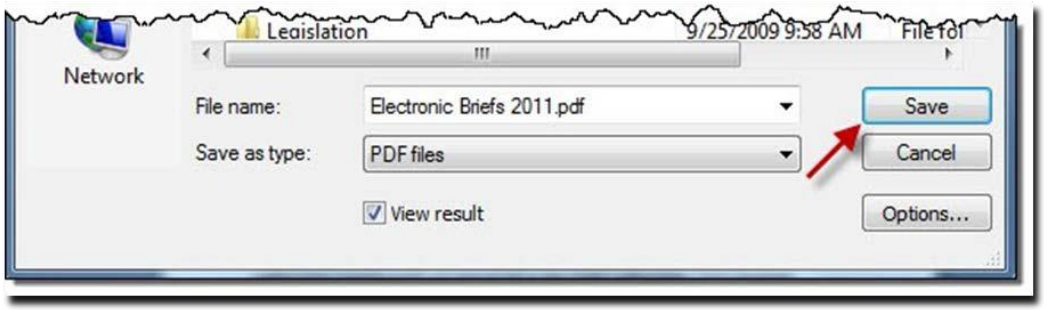
Choose **Acrobat** at the top of the screen (to the right of **View**).



Click **Create PDF** in the menu.



In the dialog box that appears, click **Save**.

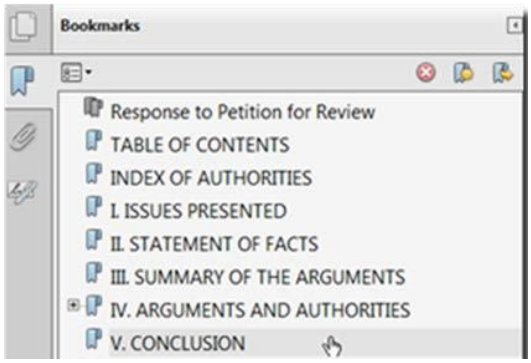


When printing a hard-copy of a document, be sure to use the PDF file to insure that the print exactly replicates the e-file version. Pagination and sentence structure may change when converting a document to a PDF.

2. Create bookmarks

A bookmark is a text link that appears in the **Bookmarks Panel** of Adobe Reader and Adobe Acrobat. Readers can use the bookmarks to quickly navigate to different sections of a document. Make sure to include bookmarks in all electronic documents and be sure to use descriptive labels for your bookmarks (e.g. Trial Court Judgment, Court of Appeals Opinion) as illustrated below.

Clicking on the **Bookmarks Icon** (left side of screen) opens the **Bookmarks Panel** revealing the list of bookmarks, as in this illustration.



Bookmark settings

To maximize the impact of your document, set the bookmarks to open automatically.

While the document is open, click **File > Properties > Initial View tab**
Click the Navigation tab dropdown and select **Bookmarks Panel and Page**
Click **OK**

Also, make sure to set the zoom settings in the bookmarks to make sure the bookmark view is always the same. See Adobe PDF Bookmark Zoom Settings.

Generating bookmarks

If you use the paragraph styles available in Word to label the headings in your document, when you use the built-in Acrobat ribbon to generate your PDF, your document will already include bookmarks to the headings in your document.

A tutorial on Word's Styles feature is beyond the scope of these instructions, but Microsoft provides a tutorial on the web. Word's Styles feature is a tremendous time saver for generating bookmarks, the table of contents, and formatting your document.

Manually adding bookmarks

To manually add a bookmark, in Adobe Acrobat, follow these steps:

1. Click on the page where you want to create a bookmark
2. Click the **New Bookmark** Icon in the Bookmarks Panel or select **CTRL** and **B** keys on your keyboard at the same time.
3. In the text of the new bookmark, type the name or label that you want to give the bookmark.

OR

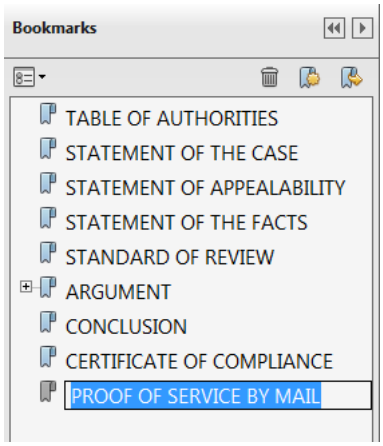
Highlight the text on the page you want to bookmark, then press the **CTRL** and **B** keys on your keyboard at the same time (or right click and select add bookmark). The bookmark will appear in the panel and the name will be the same as the text you highlighted.

Editing bookmarks

To delete a bookmark, **select the bookmark** and press the **delete key**.

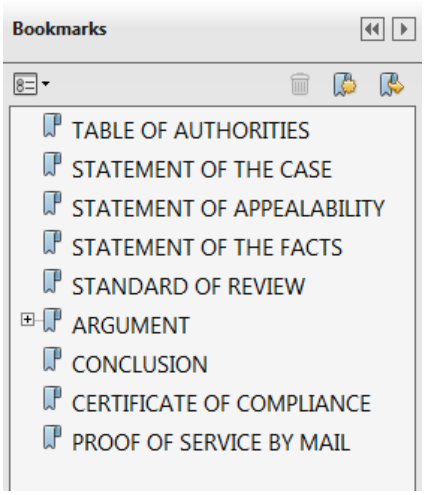
To edit the name of a bookmark, **double click** on the **bookmark**. Once the bookmark text is highlighted, you can edit the text of the bookmark. **Press enter** when you are satisfied with the results.

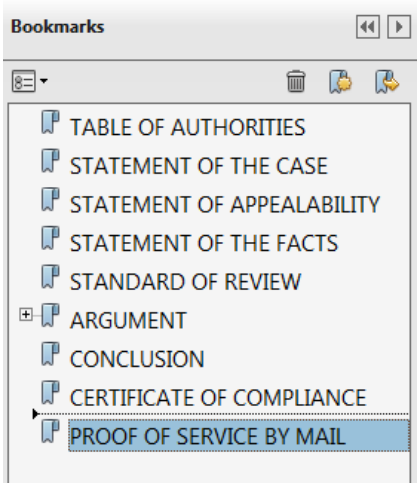
Avoid using names like Header A, Header B, etc. Instead, try something like Statement of the Case, Conclusion.



Moving bookmarks

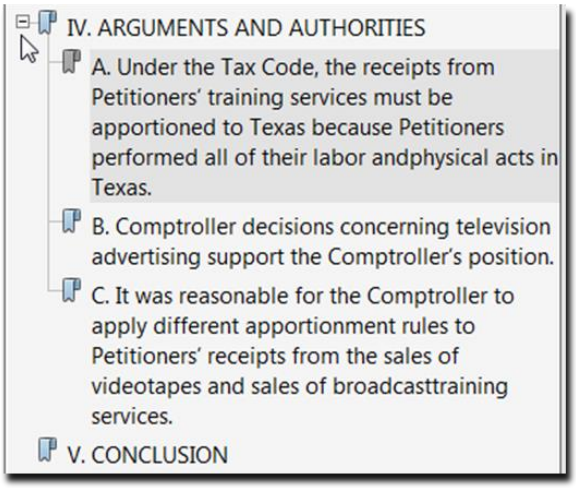
To move bookmarks up and down in the Bookmarks Panel, left click and hold the text and drag the bookmark to the desired location in the Bookmarks panel. Once the arrow and dotted line are in the new location, release the left mouse button to drop the bookmark in its new location.





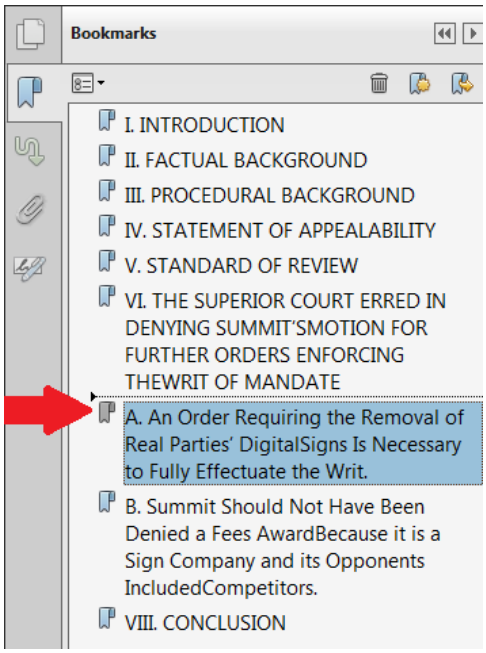
Nesting bookmarks

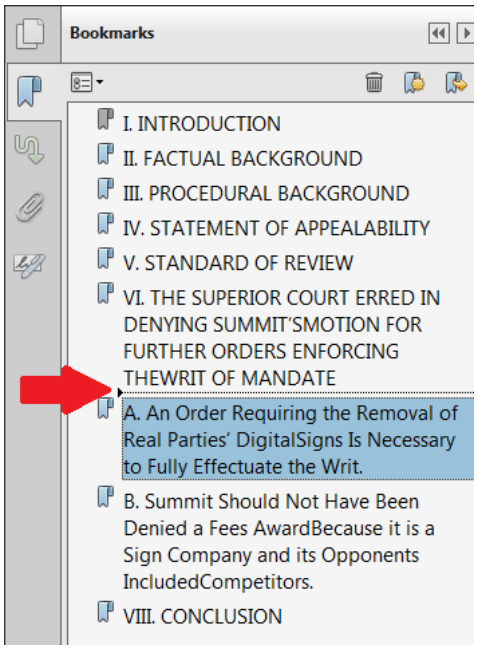
Bookmarks can also be nested underneath other bookmarks to create a tiered structure of bookmarks, as in the illustration. Clicking on the minus sign next to the Argument and Authorities bookmarks collapses these bookmarks so that they are not visible. A plus sign then appears next to the Arguments and Authorities bookmark, which will expand the nested bookmarks and make them visible again when selected.



To nest a bookmark underneath another bookmark, move the bookmark as described above. But this time, move the bookmark up and over underneath the bookmark where you want it nested. In other words, select the bookmark by left clicking and holding the mouse button down. Then move it up and to the right without releasing the mouse button. Release the mouse button once the bookmark appears to be

indented. Once you have the bookmarks the way you want them, be sure to save your document in order to save your changes!





3. Redacting

Redaction should be done before creating bookmarks and making the appendices text searchable. The steps below will remove bookmarks and text recognition.

Pursuant to Cal. Rules of Court, rule 1.20, you must redact the following information from an appendix submitted to the court:

Social security numbers
Birth date
Home address
Name of any person who was a minor when the underlying suit was filed
Driver's license number
Passport number
Tax identification number
Any similar government-issued personal identification number
Bank account numbers
Credit card numbers
Any other financial account number.

The most important thing to remember about redacting documents is to **permanently remove the information from the document**. **Do not use a black highlighter in Adobe Acrobat to cover up the information!** Highlighter marks can be removed by anyone with Adobe Acrobat and anyone can search the text of the document to find the text that is beneath the highlighter mark.

If you have Adobe Acrobat Pro, you can use the redaction features of the program to redact documents electronically (see *Redacting Using Adobe Acrobat Pro* below). *Please note that Adobe Acrobat Standard does not have redaction features.*

Redacting using Word

If you do not have Adobe Acrobat Pro, then you should edit the text of any document that you have in the original file (e.g., a Word document) to remove the information. Replace any characters that you remove with the letter x and then save the edited document as a new document. Here is an example:

Original text document:

> Mike Brown's social security number is 357-57-7372. His home address is 1510 Maple Avenue, New York, 201292. His credit card number is 2138 2912 2938 2919.

Edited Text:

> Mike Brown's social security number is xxxxxxxxxx. His home address is xxxx xxxxx xxxxxxx xxx xxxxx xxxxxxx. His credit card number is xxxx xxxx xxxx xxxx.

As you can see, depending on the font you are using, editing the document in this way may slightly alter the layout of your document. Be sure to check the page layout to see if your page numbering has been altered. If you do not have Adobe Acrobat Pro and you only have the documents in paper format, you will need to copy the documents, redact them manually, and then scan the redacted documents.

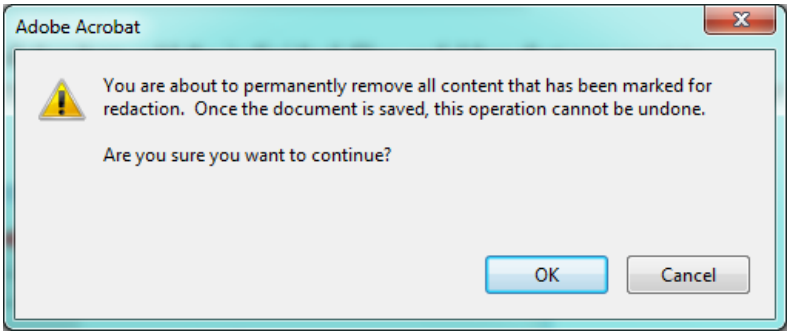
Redacting Using Adobe Acrobat Pro

Click the **Tools** panel > **Protection** > **Mark for Redaction**.

Select the text you want to redact. To select text, click the left button on the mouse and drag it across the text using the redaction tool. You can also double click a word to mark it for redaction.

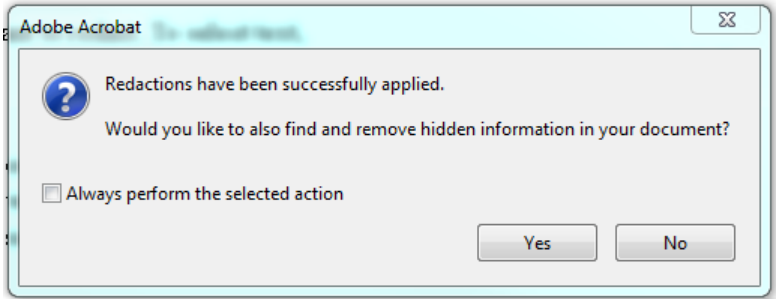
1. Place the cursor over the word marked for redaction to preview what the text will look like when redacted.
2. Once you are satisfied with the appearance, choose **Apply Redactions**.

This window will appear



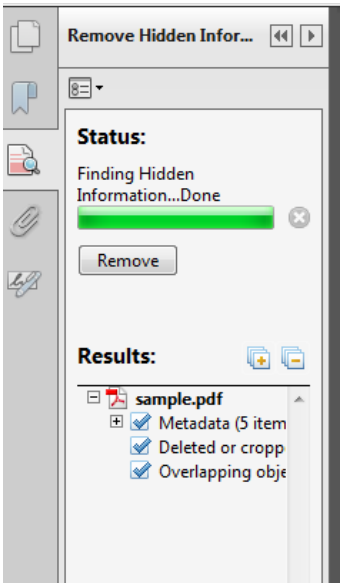
Click **OK**

When this window appears



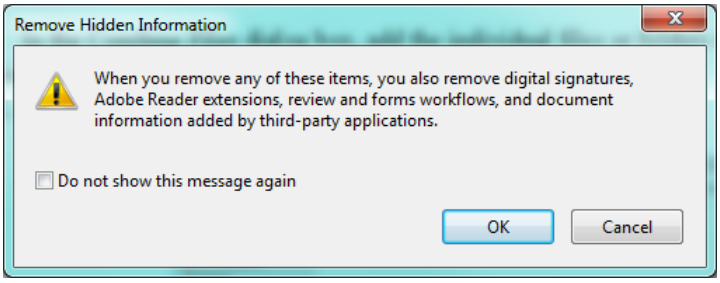
Click **Yes**

Adobe will open the panel below and find hidden information



Click **Remove**

When this window appears



Click **OK**

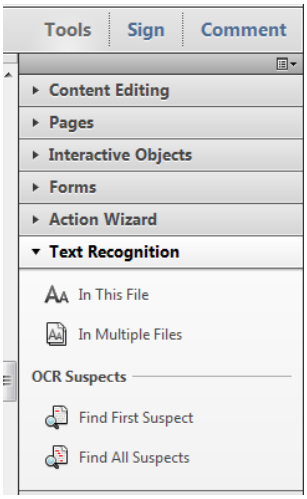
Save the document.

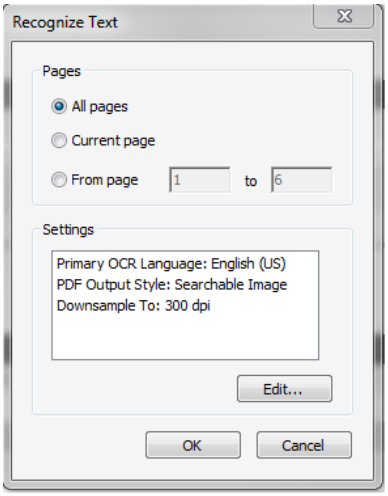
4. Text-searchable

All electronic documents must be text-searchable, in PDF (portable document format) while maintaining the original document formatting. If you find your PDF is not text-searchable, follow the instructions below.

Open the document in Adobe Acrobat Pro.

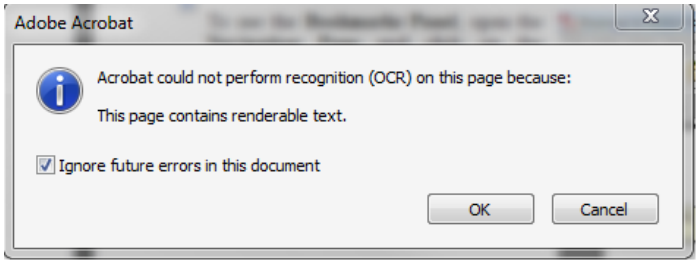
Click **Tools > Text Recognition > In This File > OK**





If some text has already been rendered searchable, check the box Ignore future errors in document and click on OK. When the Text Recognition process is complete, remember to save the document.

NOTE: If a header, e-filing stamp or bates no. has been added to a non-searchable document, Acrobat will not OCR that page and you will receive the message below.



E. Fixing Mistakes in Adobe Acrobat Pro

It is not unusual to get to the end of the process of creating an electronic brief and discover that you have made a typographical error. You may be able to fix some simple typographical errors using Adobe Acrobat. The **Edit Text** tool allows you to erase and type in a PDF as though it were a word processing document. Adobe Acrobat automatically recognizes the font type and size, and you can backspace to remove text and then retype.

> Select **Tools > Content Editing > Edit Text & Images**. Then place your cursor where you want to edit and type as you would with a word processor.

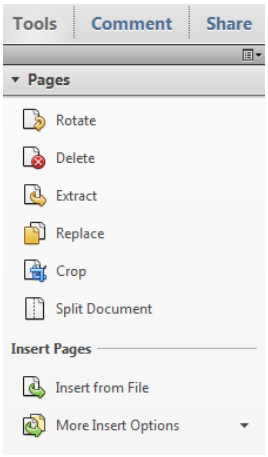
The tool has some limitations and not all fonts are available in Adobe Acrobat. If you used an unusual font you may get the following message.

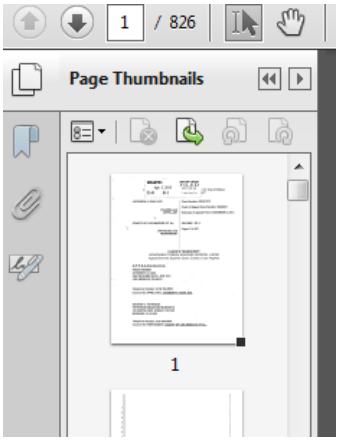
Also, the **Edit Text** tool cannot reflow all of the text in your document like a word processor, so this tool cannot be used to retype sizeable portions of your brief.

F. Replacing Pages

If the mistake cannot be fixed with the **Edit Text** tool, you may be able to fix the error by deleting the offending page and replacing it with a corrected page. To replace a page, first fix the mistake in your word processing program. Then convert the corrected word processing document to PDF. Now **Extract** the corrected page from your corrected PDF and save it as a separate PDF document. Then **Delete** the page with the error from your original PDF and **Insert** the corrected page into the proper place in the original PDF.

> Click **Tools > Pages > Extract** or click the Page Thumbnail icon on the left, right click on the page(s), select extract Pages





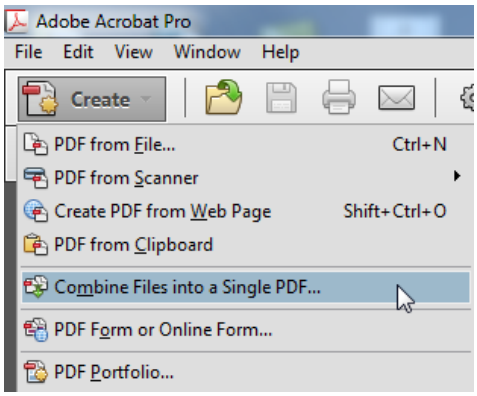
Depending on the mistake, it may just be easier to start over and recombine all your files after fixing the error in your brief. But if you have done a lot of manual bookmarking and hyperlinking, replacing the page using Adobe Acrobat may be easier than starting all over again.

G. Combine individual files into one PDF file

To combine individual files into a single PDF document, follow these steps:

Within a document in Adobe Acrobat

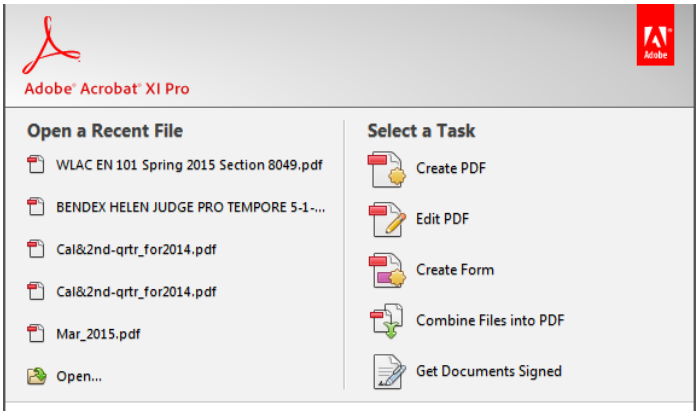
Choose **Create > Combine Files in to a Single PDF**



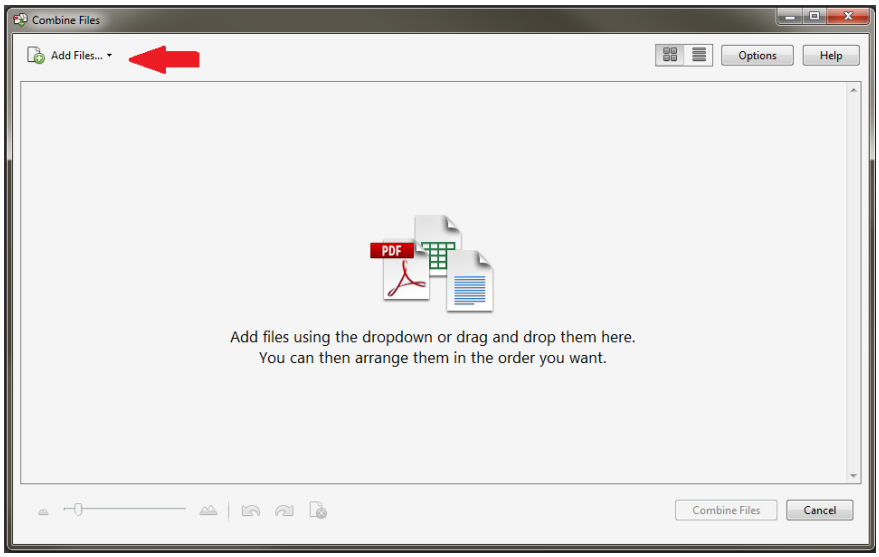
Or

From the Main Menu in Adobe Acrobat

Choose **Combine Files into PDF**



In the dialog box, add the individual files or folders that you want to combine into a single PDF. The files can be of any format supported by Adobe Acrobat (Word, PDF, Excel, etc.).



Arrange the files in the order that you want to combine them.
Select **Combine Files**.
Save and name the combined document.

H. File Size

A single PDF file may not exceed a total of 25 megabytes in size. If a filing exceeds this file size limitation, the TrueFiling system will not accept the document and the user must either (a) submit the filing in multiple parts or (b) provide the court with the filing in electronic format on a CD (compact disc), DVD or flash drive. Please note that audio files must be submitted in .wav or mp3 format and any video files must be submitted in .avi or mp4 format.

Be sure to check all rules with the court you are filing with to make sure you have met all their requirements and local rules for electronic documents

II. Creating Electronic Appellate Record on Appeal/Exhibits

Appendices must comply with California Rules of Court, rule 8.124, including chronological and alphabetical indices. For Exhibits, see rule 8.486(b). When possible, use PDF files that are converted from native formats, rather than scanned documents. (See *Saving/Converting directly to PDF*.) Counsel or parties should cooperate in providing electronic copies of documents when requested and should check the local rules of the court where they will be filing to make sure all requirements for electronic documents have been met.

A. Chronological Index

The chronological and alphabetical index should be converted from the word processing program used to create them.

B. Pagination

Make sure to number the pages consecutively *beginning with the cover page of the document*, using only the Arabic numbering system, as in 1, 2, 3. Every page must have a number. Do *not* use a separate pagination system for chronological or alphabetical index within the document. The page number does not need to appear on the cover page.

C. Scanning Documents

Although you are prohibited from scanning your documents that are available in electronic format (e.g. cases, statutes, etc.), there are occasions where you will need to scan a document in order to include it in your appendix. For example, a trial court may not have electronic filing so you may have to scan a trial court order. Or maybe you really want to include a contract in your appendix and it is only available in paper form. In those situations the only solution is to scan the document.

You can create a PDF file directly from your scanner using Adobe Acrobat or other software. When scanning, make sure that the scanner settings are:

- 300 dots per inch (dpi)
- Black and white (not gray scale or color, unless scanning an image)
- OCR (optical character recognition)

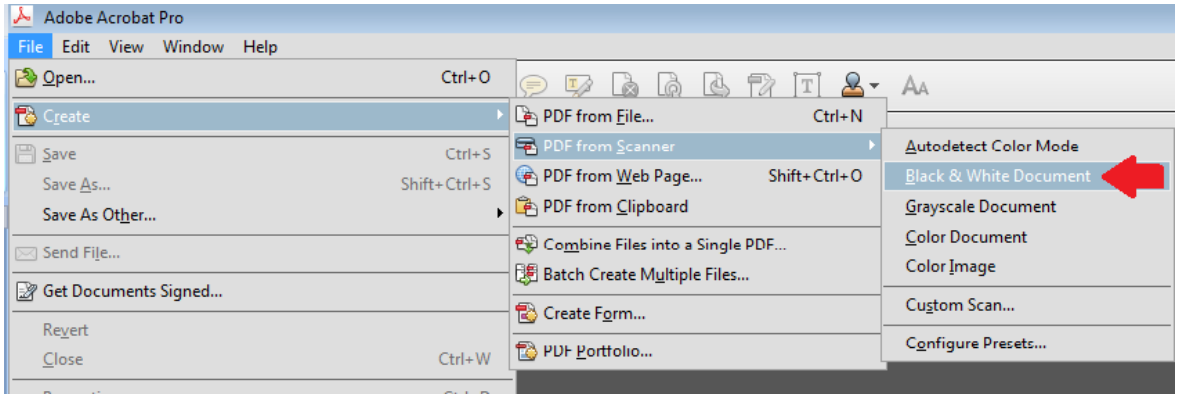
A one hundred page scanned document (that does not include images) with these settings should be about 3.5 megabytes in size. (NOTE: File size may vary with certain documents.) If scanning is creating files that are too large, check the settings on your scanner. Most office copiers, have a menu that allows the scanner settings to be adjusted.

If you have already adjusted the scanner settings, and the file size is still too large, some computer programs have the capability to reduce the file size. Adobe Acrobat Pro can do that (see instructions below). Make sure to do this before bookmarking the appendix. There are also a number of online resources that explain how to reduce the file size of scanned documents.

Scanning with Adobe Acrobat

If you have a scanner connected to your computer that Adobe Acrobat recognizes, you can scan documents using Adobe Acrobat. Follow these steps:

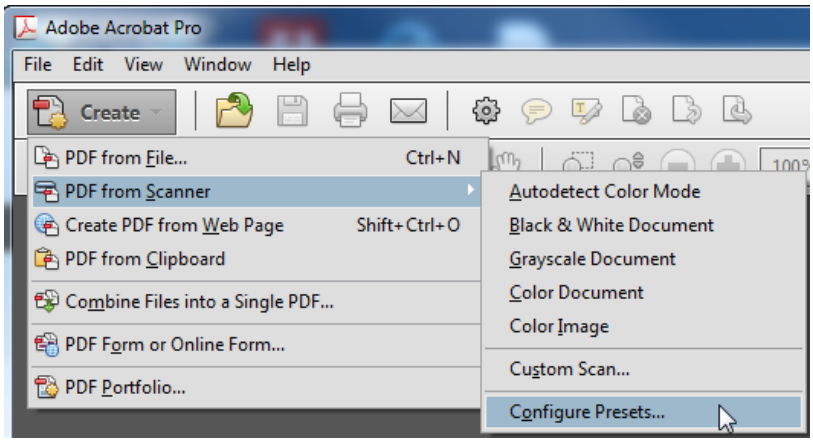
1. Insert the document into your scanner
2. Open Adobe Acrobat
3. In Acrobat, choose **Create> PDF From Scanner**
4. Choose Black and White



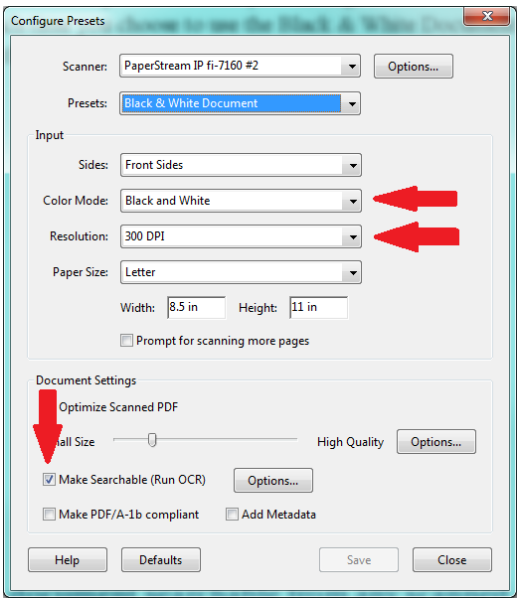
Preset scanning settings for Adobe Acrobat

Adobe allows you to preset settings for scanning a document.

Select **Create> PDF from Scanner> Configure Presets**



Configure your presets to scan at 300 dpi. Be sure to check **Make Searchable (Run OCR)**. For standard black and white documents you do not need to move the slider to create a high quality scan—smaller file size is preferred. Save your settings before scanning. The default settings are now set and each time you choose to use the Black & White Document preset the document will be scanned using these settings.



D. Combine individual files into one PDF file

See *Combine individual files into one PDF file* above.

E. Create bookmarks for all documents contained in the appendix

A bookmark is a text link that appears in the Bookmarks Panel of Adobe Acrobat. Some courts require bookmarks for each document that is listed in the index. Be sure to check the local rules of the court you are filing with to make sure you have met all requirements for electronic appendices.

For documents without titles, be sure to use descriptive labels for your bookmarks.

See *Create Bookmarks* in Section I. above.

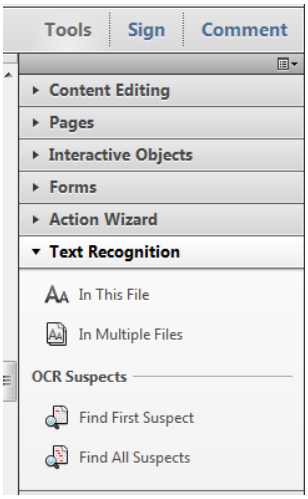
F. Redacting

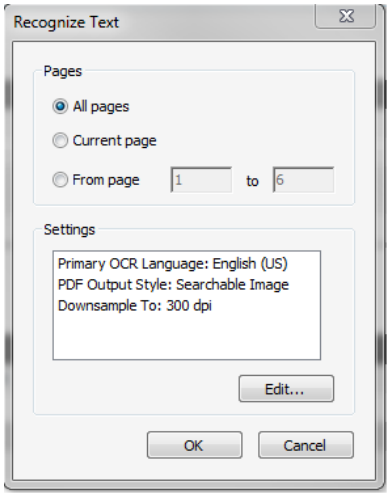
See *Redacting* in Section I. above

G. Make a document searchable from any scanned or otherwise non-searchable material searchable by using Text Recognition

Open the document in Adobe Acrobat Pro.

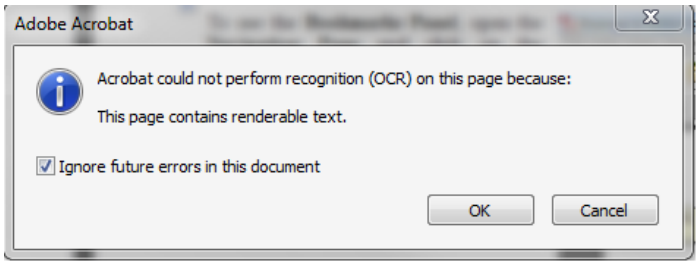
Click **Tools >Recognize Text> In This File > OK**





If some text has already been rendered searchable, check the box Ignore future errors in document and click on OK. When the OCR process is complete, remember to save the text searchable version of the document.

NOTE: If a header, e-filing stamp or bates no. has been added to a non-searchable document, Acrobat will not OCR that page and you will receive the message below.



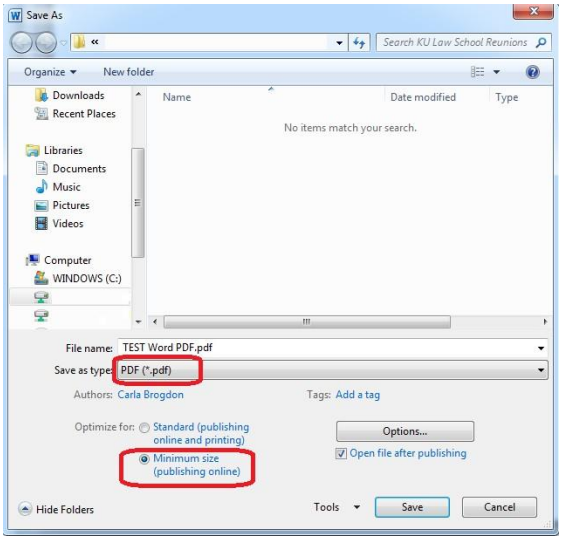
H. Optimize PDFs to reduce file size

Large documents or documents containing forms, photos or graphics should be saved as an optimized PDF to reduce file storage size.

Select **File** and click **Save As**.

From the **Save as type** dropdown menu, select **PDF**.

From the **Optimize for** radio buttons, select **Minimum size (publishing online)**.



Click **Save**.

III. Hyperlinking

Overview of Hyperlinking

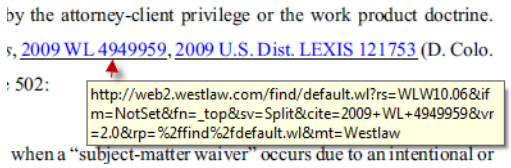
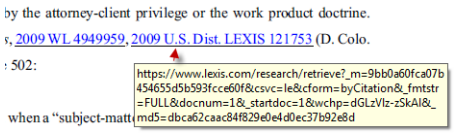
In the internet research world, hyperlinks are a standard way of "drilling down" for more detail or specific information. Just as all web pages contain links to other pages, cases downloaded from legal research services such as Westlaw or Lexis contain links to the cases, statutes, articles, or other sources cited within the opinion. The links allow immediate access by the reader to these referenced materials.

Attorneys can include links to cited law and their Appendix or Clerk's Transcript and Reporter's transcript, adding another level of persuasion to their writing. Hyperlinks in briefs and other court filings provide quick, easy, and pinpoint access to particular sections of a case, or to specific filings in the court's record. The attorney can thereby highlight the precise issue presented, and the specific evidence and controlling or persuasive law the court should consider.

Though it is not required, rather preferred, hyperlinks in court filings are very beneficial for court chambers. Court submissions which include links to relevant case law and case filings are easy for chambers staff to review. The attorneys' arguments can be immediately verified in the context of the relevant law. The justice or judicial clerk is able to read the text of the cited case law on one screen while reading the attorney's brief on the other. And if a brief contains links to referenced exhibits, and even to specific pages within those exhibits, the judge or judicial clerk can access the relevant evidence without having to navigate through the paper record. Particularly when dealing with large and complex cases, links save chambers considerable time and effort. Links make it easy for the court to verify – and adopt – the positions taken by an advocate.

Types of Permissible Hyperlinks

Subject to the court's local rules, the following types of hyperlinks are typically allowed in court documents.

Internal Links	For example, the Table of Contents located at the beginning of this Guide.
Links to attachments and exhibits being filed with your brief	**Note**: Evidence ***must*** be filed of record. A hyperlink to a public website where evidence can be found is not a substitute for filing evidence in support of a motion.
Links to case and statute citations **Note:** Unless a cited case cannot reasonably be found from a public source, it is not necessary to attach copies of cases or statutes to your brief.	For example: **Westlaw**,  **Lexis**,  **or court websites**.

Creating a Hyperlinked Table of Contents

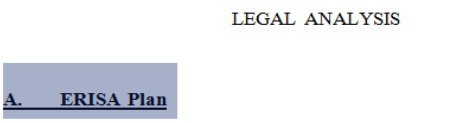
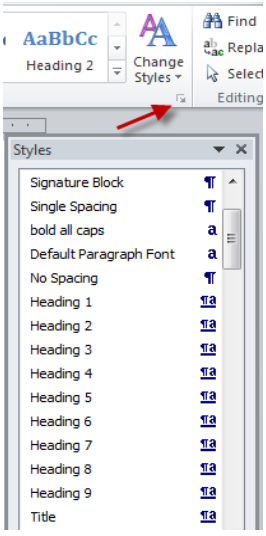
A table of contents in a Word document can include internal hyperlinks for navigating the document. When the document is converted to PDF format, these links will become bookmarks in the PDF document. Note that the Table of Contents is different from the Bookmarks that are required in the PDF version.

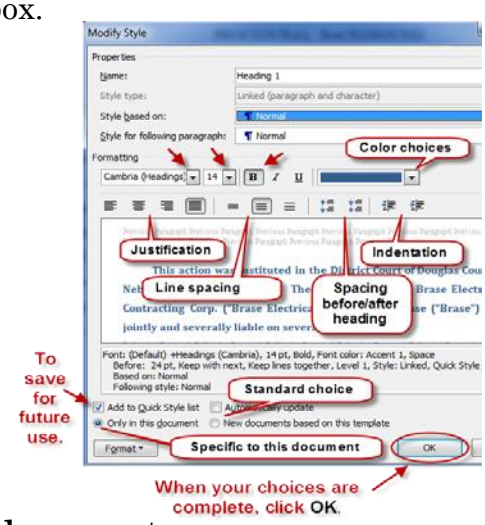
Although there are several methods for creating a table of contents in Word, the one most useful to attorneys (and discussed below), is to create the document, include any headings as you write, and then:

- Mark and format the headings to be included in the table of contents;
- Generate and insert the table of contents; and
- Edit as needed.

Marking and Formatting Table of Contents Entries

To mark and format entries to be included in the table of contents using Microsoft Word:

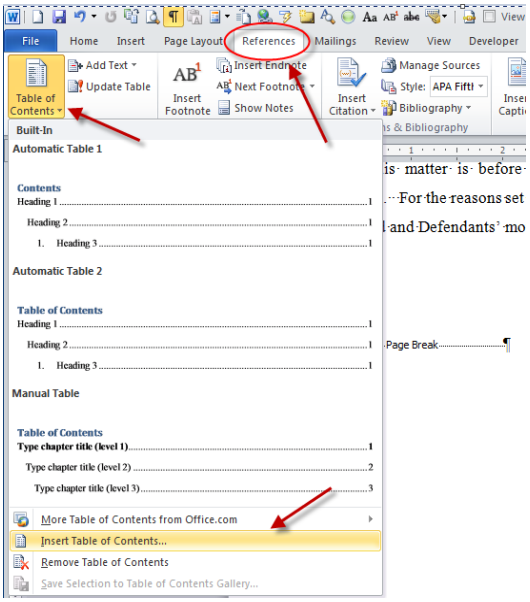
STEP	ACTION
1	Create your document, inserting all headings with the format of your choice.
2	Using your cursor, scroll over and select the heading you want to include in the table of contents. 
3	From the **Styles** section on your **Home** tab, Click the down arrow in the right lower corner. A drop down list will appear.  **Note:** There are pre-formatted Heading Styles available in MS Word, but only 2 may be visible in your styles drop-down menu. Additional heading options will appear, as you make your selections.

If…	Then…
You want the text of the table of contents entries to **match the headings already created** within your document:	Use your cursor to select the heading to be included in the table of contents. From the Styles list**, Right-click** the heading level you wish to apply. In the box that appears, select: **Update Heading [x] to Match Selection.** Continue until a heading style has been applied to all heading levels within your brief.
You want to: **Set a standard format** (e.g. font, font color, bold, etc.), for all headings and table of contents entries created with your Word program Or **Change the heading format** in the brief already created:	From the Styles list: **Right-Click** the heading level you wish to modify. In the box that appears, select **Modify** to open the Modify Style box. Choose text: • font • font size • appearance • color • justification • line spacing  Save settings for: • **only in this document**, or • all documents created using your standard **template** • **Add to Quick Style List.** Click **OK.**

Scroll through your document. For each heading, select the heading text with the cursor, then click the heading style to be applied.

Generating and Inserting the Table of Contents

To add the Table of Contents to your document:

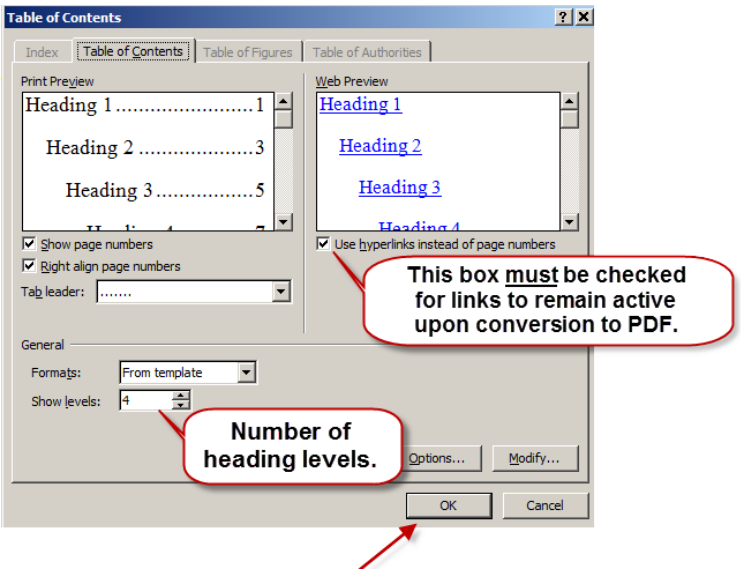
STEP	ACTION
Place your cursor in the document at the location you want to insert the table of contents. Add a title for the **Table of Contents**. Enter a few hard returns. **Control + Enter** to insert a page break.	→ vs.¶ ¶ BRASE·ELECTRICAL·CONTRACTING·CORPORATION,·A·Nebraska·Corporation;·and·STEVEN·H.·BRASE,¶ ¶ Defendants.¤ ¶ ¶ **MEMOR** → This·matter·is·before·the·court·on·the·parties'·c judgment.···For·the·reasons·set·forth·below,·Plaintiff's·motior be·denied·and·Defendants'·motion·for·summary·judgment·w ¶ **Table·of·Contents¶** ¶ ¶ Page Break¶
Place your cursor where the table of contents entries should begin.	be·denied·and·Defendants'·motion·for·summary·judgment·will·be·granted.¶ ¶ **Table·of·Contents¶** ¶ Page Break¶
From the **References** tab of your Word ribbon, Select **Table of Contents**, and from the menu that appears, Select: **Insert Table of Contents**.	

Make selections for the appearance of the table of contents.

Click **OK**.

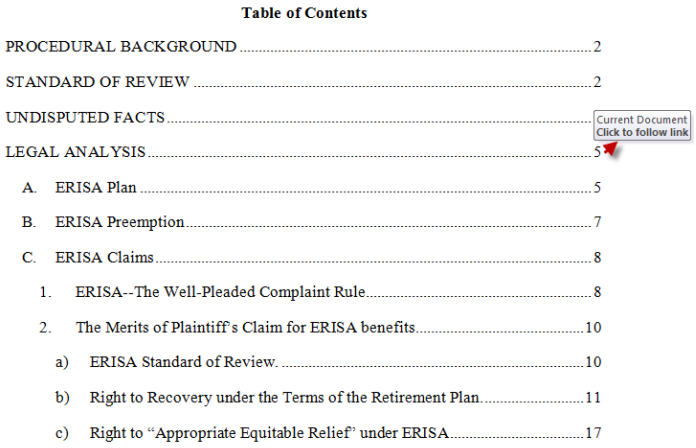
Note: If your table has more than three levels, you must set **Show levels** to the correct number.

Note: The "Use hyperlinks instead of page numbers" must be checked or the table of contents will not have active links upon conversion to PDF.



The Table of Contents, with active section links, will be inserted into your document.

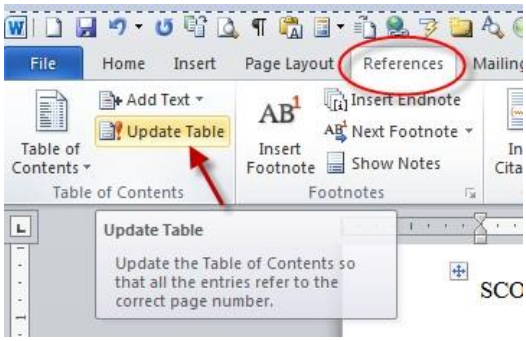
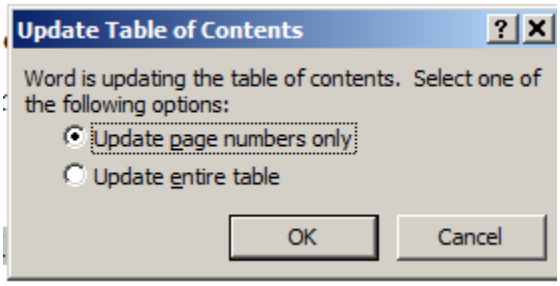
Note: You can manually modify the page numbers to appear as other links in your document, blue and underlined).



Editing the Table of Contents (if needed)

Inserting the Table of Contents may result in page break changes. For example, hard page breaks or extra lines that were added during drafting to adjust the overall look of the document may no longer be needed, or some may now need to be added.

If the brief was modified after the table of contents was inserted:

STEP	ACTION
From the reference tab on the Word ribbon, select **Update Table**.	
Select **Update page numbers only**. Click **OK**. **Note**: If you have added or changed a heading, choose **Update entire table**.	

When the entire document is complete, using MS Word, **Save** the document as a PDF or **Create PDF**.

> **Note: Do *not* Print to PDF. All active links in your Word document become inactive in PDFs created using Print to PDF.**

Formatting the Appearance of the Links Inserted

Before inserting links into a document, you may choose how those links will appear in the final document. For example, do you want them to appear:

blue and underlined,

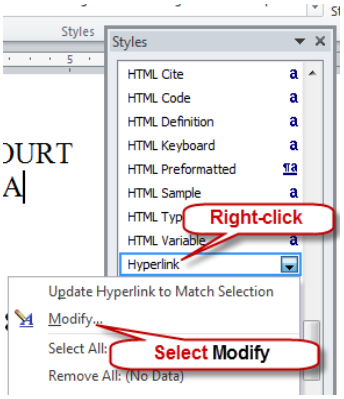
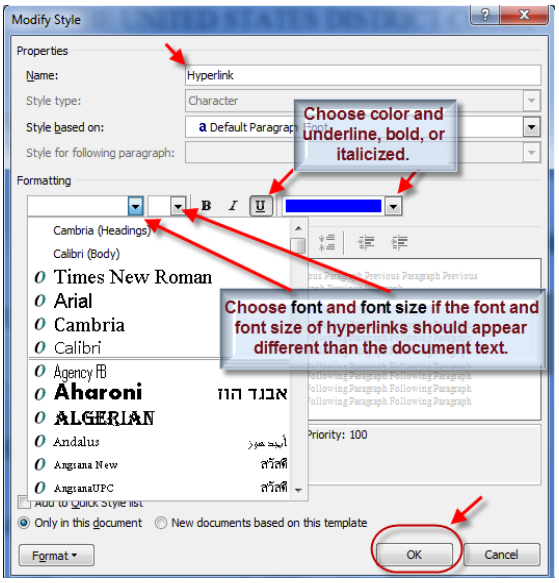
bold and black,

black and italicized,

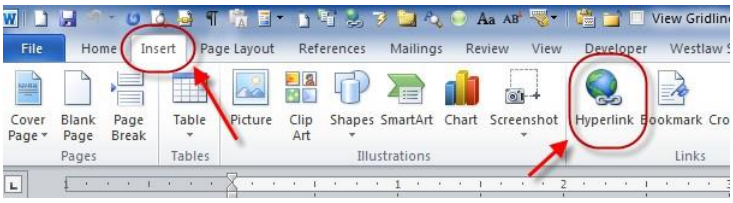
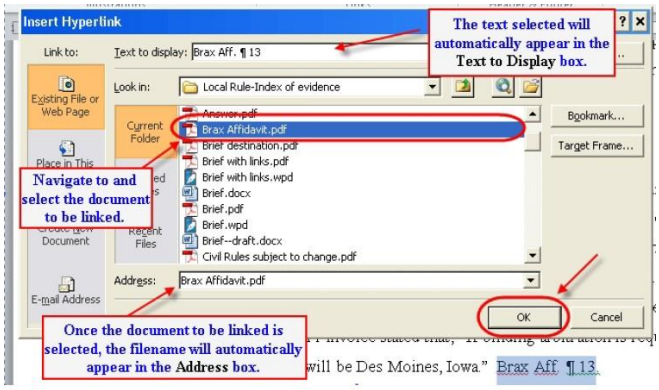
or

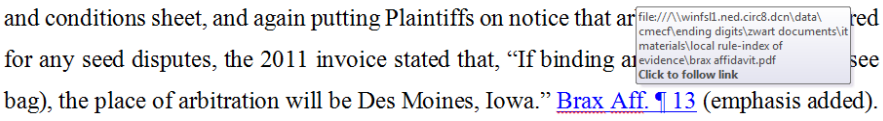
some other appearance?

To select the appearance of the links in your document:

STEP	ACTION	
1	On the **Home** tab, click on the tiny arrow under **Changes Styles**.	
2	A drop down menu will appear. Scroll down until you see **Hyperlink**. Right-click on **Hyperlink,** and from the choices that appear, select **Modify**.	
3	A **Modify Style** box will appear. Change the color, font, and underlining, etc. for hyperlinks. **Note:** Choose a specific font and font size for the linked text *only* if the linked text font and font size should appear different from that of the document text. Otherwise, leave the font and font size selections blank. Click **OK**.	

Adding Links to Attachments

STEP	ACTION
1	Save all the attachment documents you will cite in your brief into a single folder in your computer. The documents must be in PDF format. Be sure the names of the files do not contain special characters, such as apostrophes or ampersands, as these will break the hyperlinking process.
2	While drafting your brief, include the citations to the documents saved in your computer.
3	Using your cursor, select the text to which a link will be added. for any seed disputes, the 2011 invoice stated that, "If binding arbitration is required (see bag), the place of arbitration will be Des Moines, Iowa." Brax Aff. ¶ 13.
4	On the **Insert** ribbon, select **Hyperlink**. 
5	In the **Insert Hyperlink** dialog box: • Navigate to cited file saved on your computer; • **Select** the file; and • Click **OK**. 

6	A link to the file will be added to the text. If you hover over the link with your cursor, you will see the link address.  Add links to all the citations in your brief accordingly. **Note:** Specific page links can be added by following the directions in the previous section. Use the **PDF** page number, not a Bates number or footer page number, for the citation.

Automated Links to Legal Citations

Links to legal citations can be added manually or, assuming the software is compatible with your computer and word processing software, by using automated linking software available through Westlaw or Lexis.

Access to Linking Software

Tool	Cost	URL
Westlaw InsertLinks	Must purchase a West BriefTools subscription. Estimated cost: $100/month for small firms;	http://legalsolutions.thomsonre uters.com/law-products/solutions/brief-tools?searchterms=brief+tool
Lexis for Microsoft Office	This Lexis software product will add links for research and drafting purposes, but those links are lost upon conversion to PDF. Lexis is investigating the issue.	http://www.lexisnexis.com/en-us/products/lexis-for-microsoft- office.page

Linking Software—Compatibility Information

The following graph outlines the compatibility of Shepard's Links 2008, West InsertLinks, and Lexis Links for Microsoft Office for inserting links into MS Word and WordPerfect documents with a Windows XP (SP3) 2GB Memory, Windows Vista (SP2) 4GB Memory, or Windows 7 – 4GB Memory computer.*

	Shepard's Links 2008	Lexis for Microsoft Office	West InsertLinks
MS Word 2010		X**	X***
MS Word 2007		X**	X***
MS Word 2003	X		X***
MS Word 2000	X		
WordPerfect X6**			
WordPerfect X4 – X5			X
WordPerfect X3	X		X
WordPerfect 10 – 12	X		

* The West and Lexis linking software programs cannot be used on Apple computers. Moreover, although Shepard's Links was not designed to operate on Windows Vista and Windows 7 (as reflected in the Lexis literature), it is working on these computer systems.

** Lexis for Microsoft Office is being developed and tested. However, in its current stage of development, any links added by Lexis for Microsoft Office are being stripped out upon conversion to PDF. Lexis is investigating this issue.

*** Westlaw product information states InsertLinks is compatible with both 32- and 64-bit Microsoft Word. However, while it works well with 32-bit Word, InsertLinks is not fully compatible or useful with 64-bit Word.

**** West currently has no linking software compatible with WordPerfect X6. West indicates it may develop and release this product during the summer of 2013.

Westlaw InsertLinks

InsertLinks is a Westlaw computer software program which scans Microsoft Word or Corel WordPerfect[1] documents to locate legal citations, and then automatically inserts hyperlinks to the Westlaw internet address (url) for those citations into the word processing document.

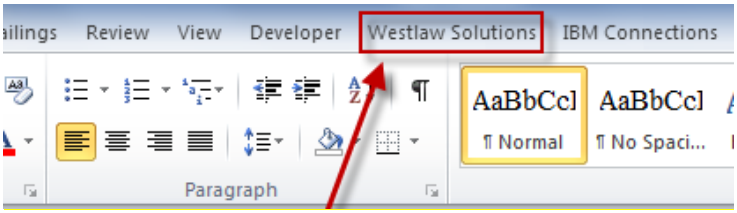
Installing West InsertLinks

InsertLinks is part of the West BriefTools suite, and a BriefTools subscription is required in order to use this software.

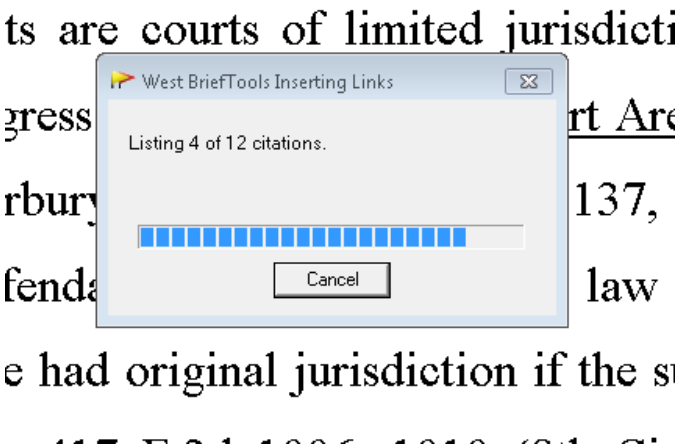
- The current West BriefTools product is Version 2.7.2039, which was updated on December 10, 2012.

Using West InsertLinks

Once InsertLinks software is installed, Westlaw links can be installed automatically in Microsoft Word documents using the following steps:

STEP	ACTION
1	With the Microsoft Word document to which you are adding links open on your screen:  Select the **Westlaw Solutions** tab on the Word ribbon.
2	The West BriefTools options will open. Select **InsertLinks**.

[1] Currently, InsertLinks is not compatible with, and cannot be used for, automatically inserting links into WordPerfect X6 documents. It does, however, work with prior versions of WordPerfect.

STEP	ACTION
3	The InsertLinks software will begin searching the document for citations and inserting the appropriate links.  The box depicted above will disappear when the process is complete and all links are installed.

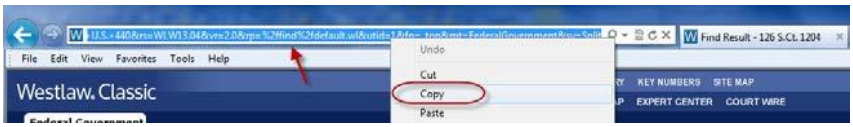
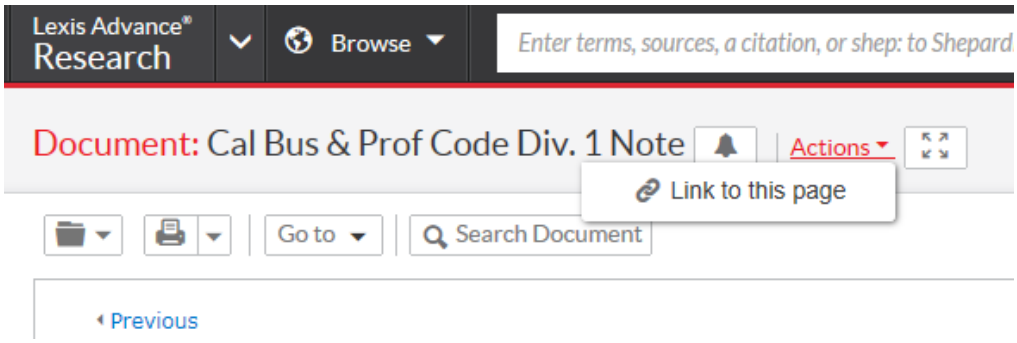
Manually Inserting Hyperlinks

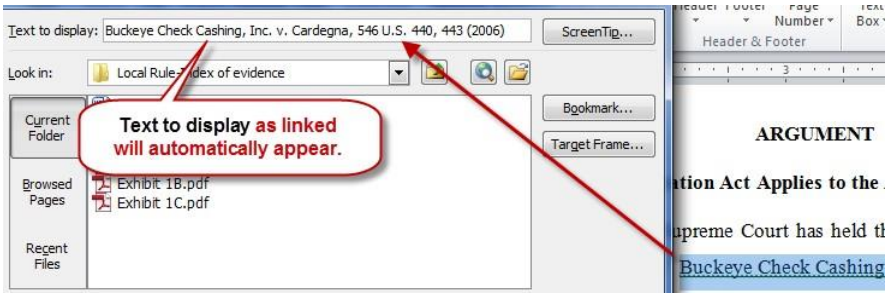
As previously described, hyperlinks to documents filed can be manually added to a document about to be filed. It is also possible to manually create links to documents available through commercial legal websites (e.g., Lexis or Westlaw), and those posted on the court's website (Local Rules).

Manually adding links can be labor intensive if the document is long, but the process is not difficult. And even if you are primarily using software to add links to a document, understanding the underlying mechanics of hyperlinking within WordPerfect and Word documents is helpful and may be necessary if, for example, you need to make corrections to the automatically created links.

Manually Creating Links to Online Research Resources

The process for manually adding links to Westlaw, Lexis, Google Scholar, or any other online research resource (LoisLaw, FastCase, etc.,) is the same.

STEP	ACTION
1	In the brief, use your cursor to select the citation to which you are adding a link. The United States Supreme Court has held that the FAA "embodies the national policy favoring arbitration." Buckeye Check Cashing, Inc. v. Cardegna, 546 U.S. 440, 443 (2006). See also Mastrobuono v. Shearson Lehman Hutton, Inc., 514 U.S. 52, 56 (1995);
2	Sign into the legal research website and open the cited document. Select the url address for the document. **Note:** When using this method, if the link on the website changes, the link in the document may not work. Right-click, and **Copy** the address. See below:  **OR** When using Lexis Advance, select Actions > Link to this page. This will use a static link, which should always work.  **Note**: Check your local rules for any authority or limitations on the legal research websites to which links are permitted. **Note:** Some attorneys have reported difficulty using this method to insert links to Lexis research.

STEP		ACTION
3	a	Select the **Insert** ribbon, then select **Hyperlink**. An **Insert Hyperlink** dialog box will appear.  **Note:** The text you selected will automatically appear in the "**Text to display**" line.
	b	Place your cursor in the **Address** box of the Insert Hyperlink dialog box. Right-click. From the drop-down that appears, select **Paste.** Click **OK**.
	c	The link to the citation will be added in your brief.

Special thanks is given to Blake A. Hawthorne, Clerk of the Texas Supreme Court and the Texas Supreme Court for sharing their *Guide to Creating Electronic Appellate Briefs*.