



Guide to Creating Electronic Briefs for the Connecticut Supreme and Appellate Courts



Introduction

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

Be sure to check the guidelines provided for the optional E-Briefing program to make sure you have met all the requirements and rules for appellate briefs.

I. Creating Electronic Appellate Briefs

A. Format

Check with the court's website to ensure that you meet the requirements or guidelines for formatting.

B. Tools

Word processor

The primary tool for creating an electronic brief 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 bookmarks¹ 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 for the optional E-Briefing program.

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.

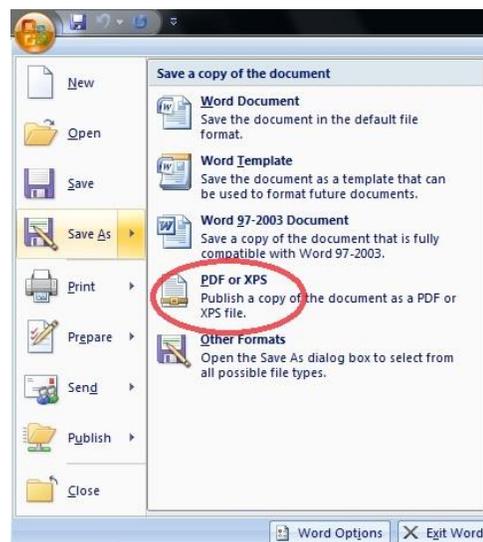
1. Saving/Converting directly to PDF

Word 2007 (without Adobe Acrobat Pro installed)

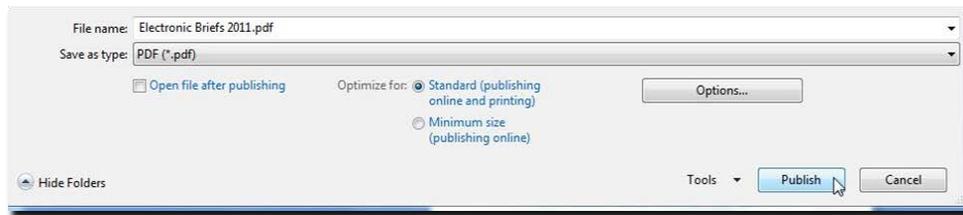
Click the Microsoft Office Button in the top left hand corner of Word.



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

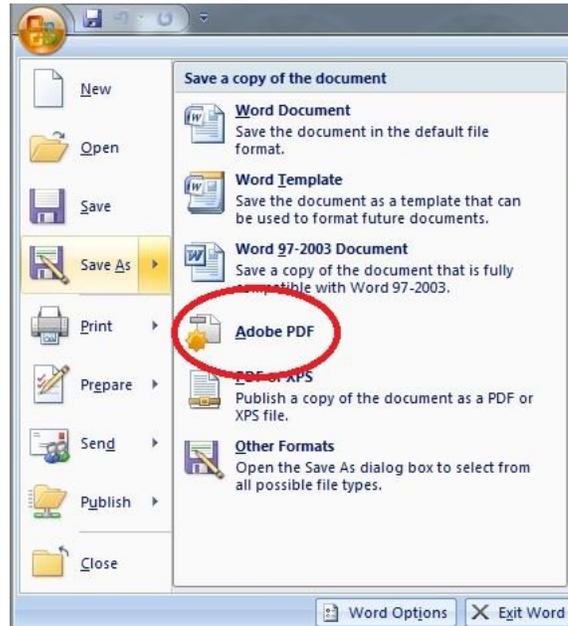


In the dialog box that appears, click the button in the lower right hand corner that says **Publish**.

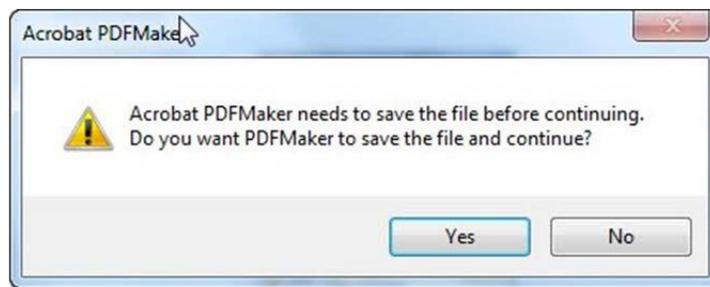


Word 2007 (with Adobe Acrobat Pro installed)

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

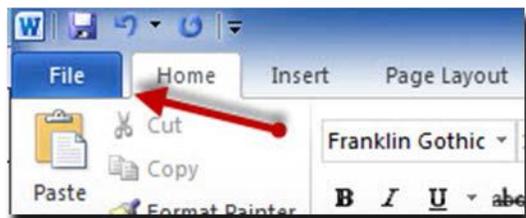


When the box below appears, choose **Yes**.

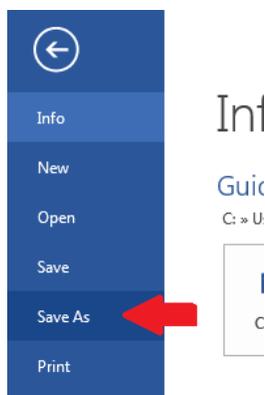


Word 2010 and 2013

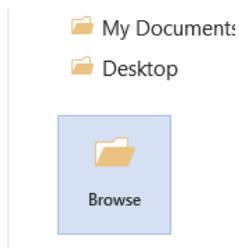
Click on the **File** tab.



Choose **Save As**.



Click **Browse**



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



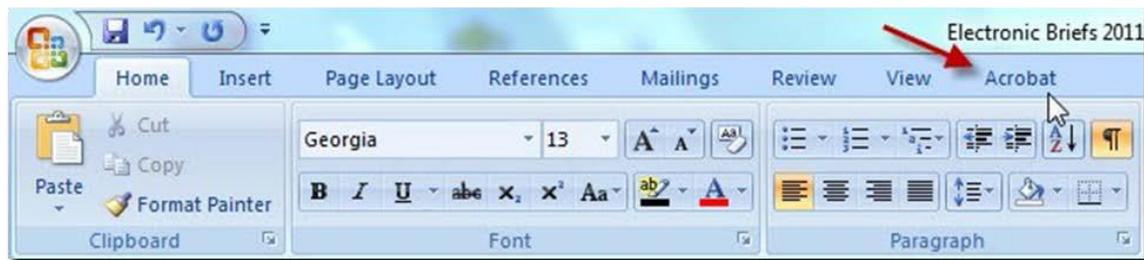
Click **Save**.

Adobe Acrobat Ribbon in Word

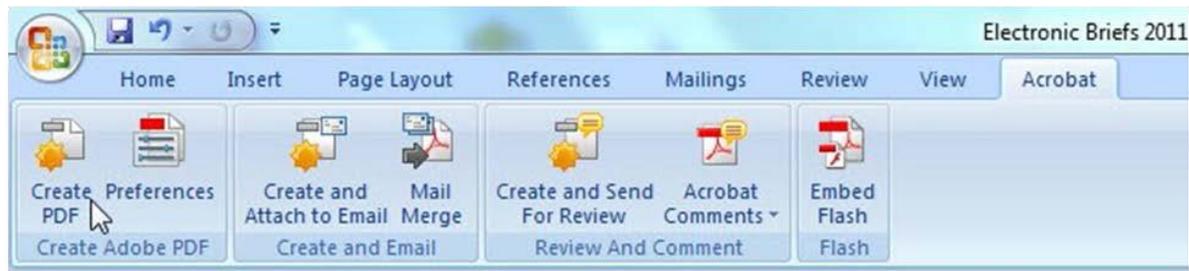
When you install Adobe Acrobat, the installer may add Acrobat buttons or menu commands to Microsoft Office applications (e.g., Word, Excel, PowerPoint).

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.

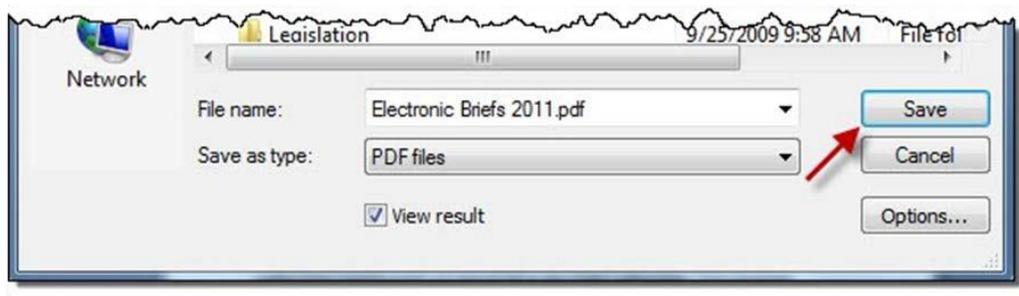
Choose **Acrobat** at the top of the screen (to the right of **View**).



Click **Create PDF** in the menu.



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

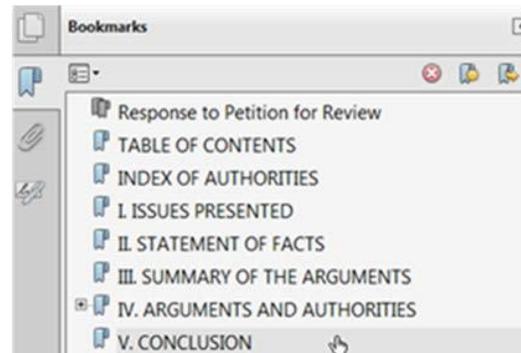


When printing a hard-copy of a document, be sure to use the PDF file to insure that the print exactly replicates the e-file version. Pagination and sentence structure may change when converting a document to a PDF.

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, Appellate Court 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. This setting is only available in Acrobat Pro, not in Adobe Reader.

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

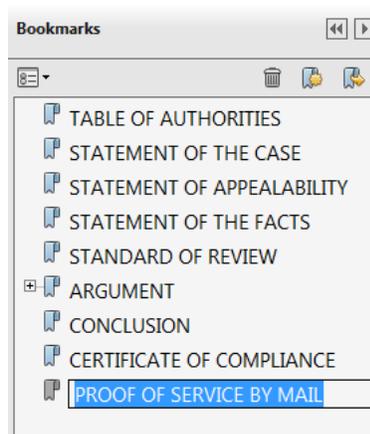
Highlight the text on the page you want to bookmark, then press the **CTRL** and **B** keys on your keyboard at the same time (or right click and select add bookmark). The bookmark will appear in the panel and the name will be the same as the text you highlighted.

Editing bookmarks

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

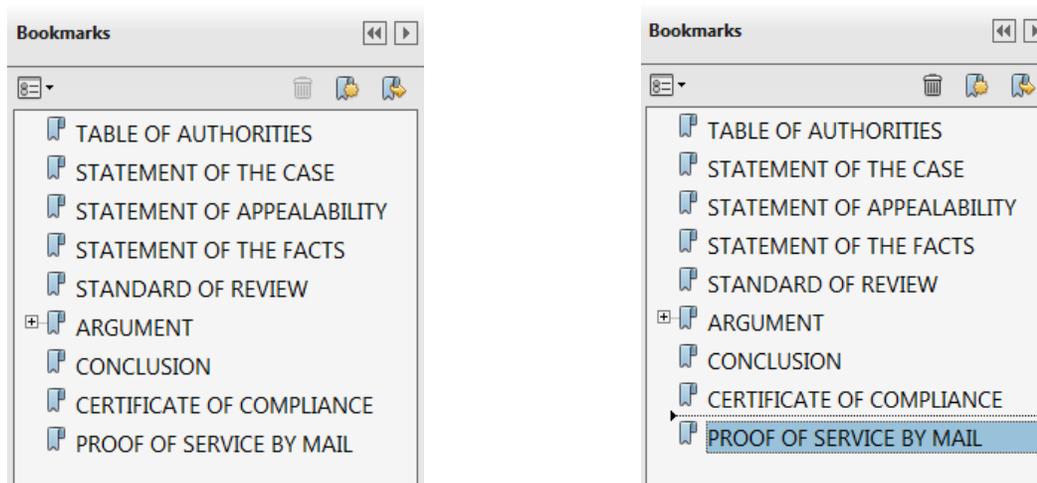
To edit the name of a bookmark, **double click** on the **bookmark**. Once the bookmark text is highlighted, you can edit the text of the bookmark. **Press enter** when you are satisfied with the results.

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



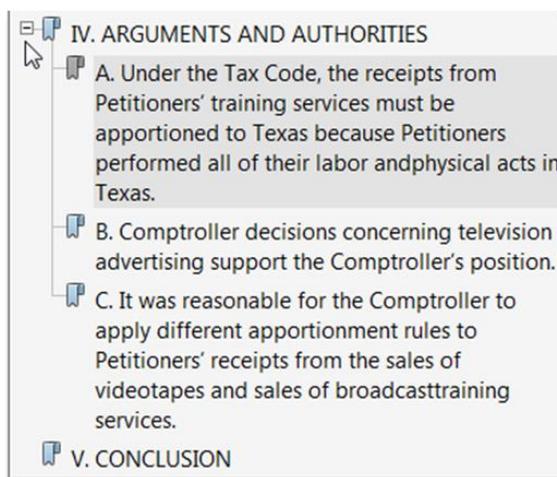
Moving bookmarks

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.



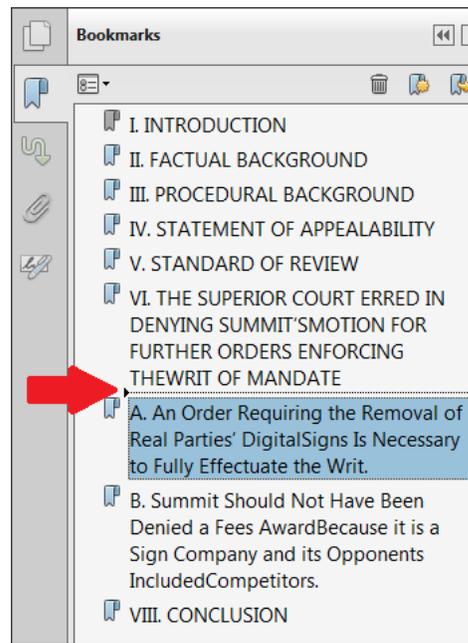
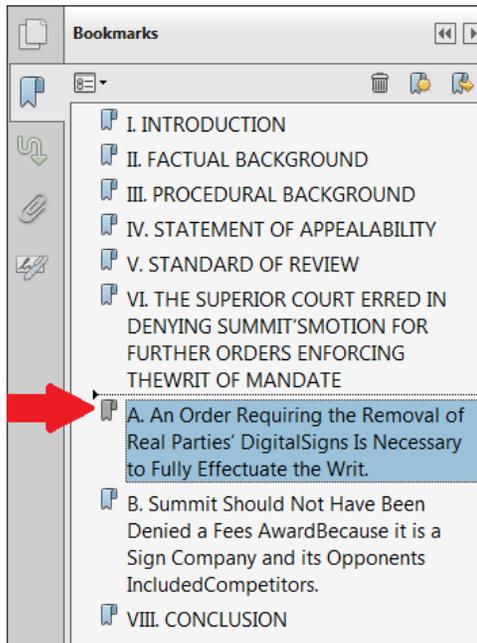
Nesting bookmarks

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!

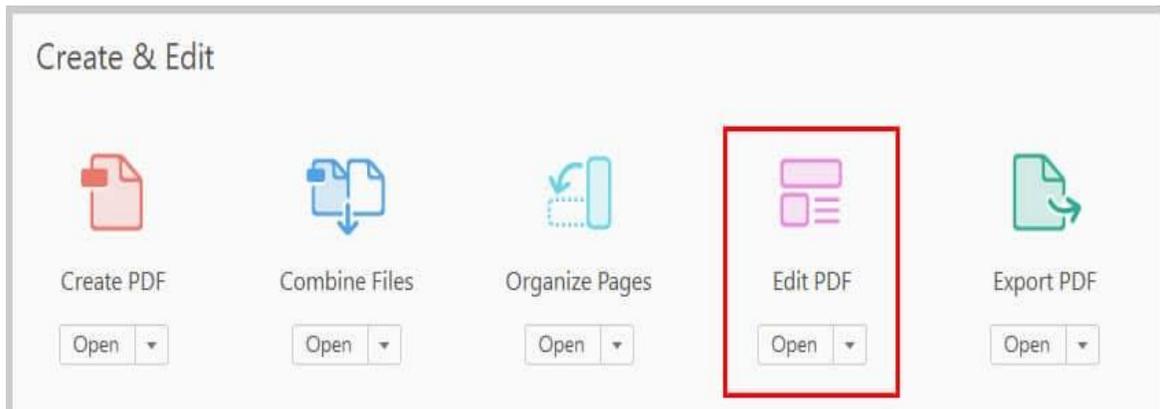


3. Create Internal Links in PDFs

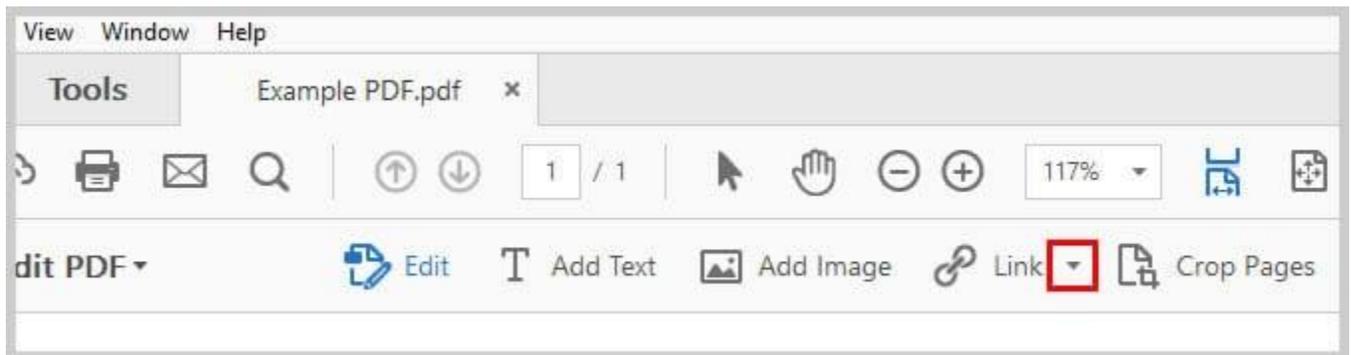
1. Select the **Tools** tab.



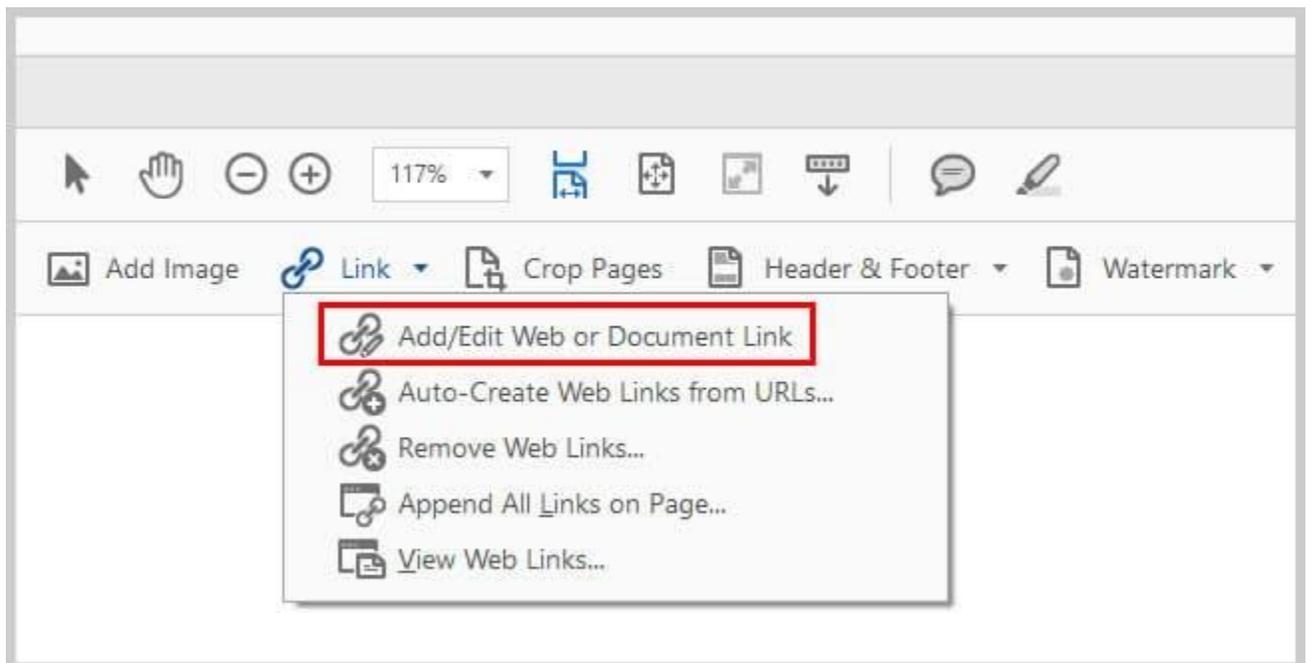
2. Select the **Edit PDF** icon in the Tools Pane.



3. Select the **Link down arrow** in the Edit PDF toolbar.

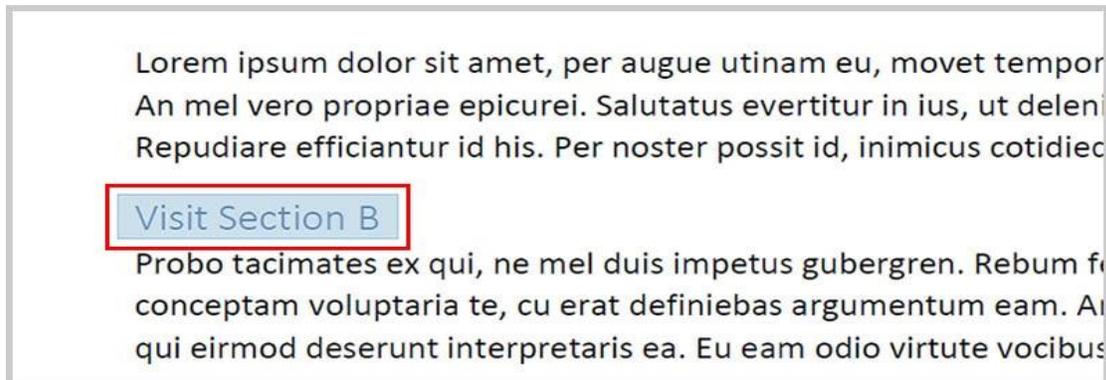


4. Select **Add/Edit Web or Document Link** from the drop-down menu.

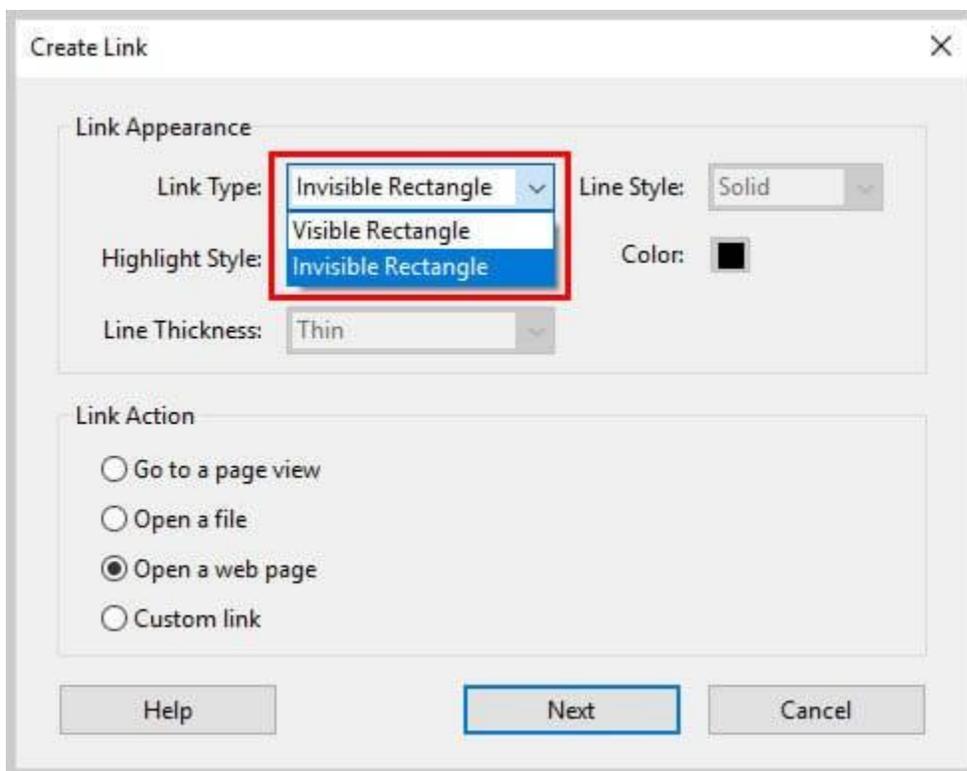


Your selection (arrow) cursor will turn into a crosshair-style cursor.

5. Left-click and hold as you use the cursor to drag a rectangle around the text you want to turn into an internal link.

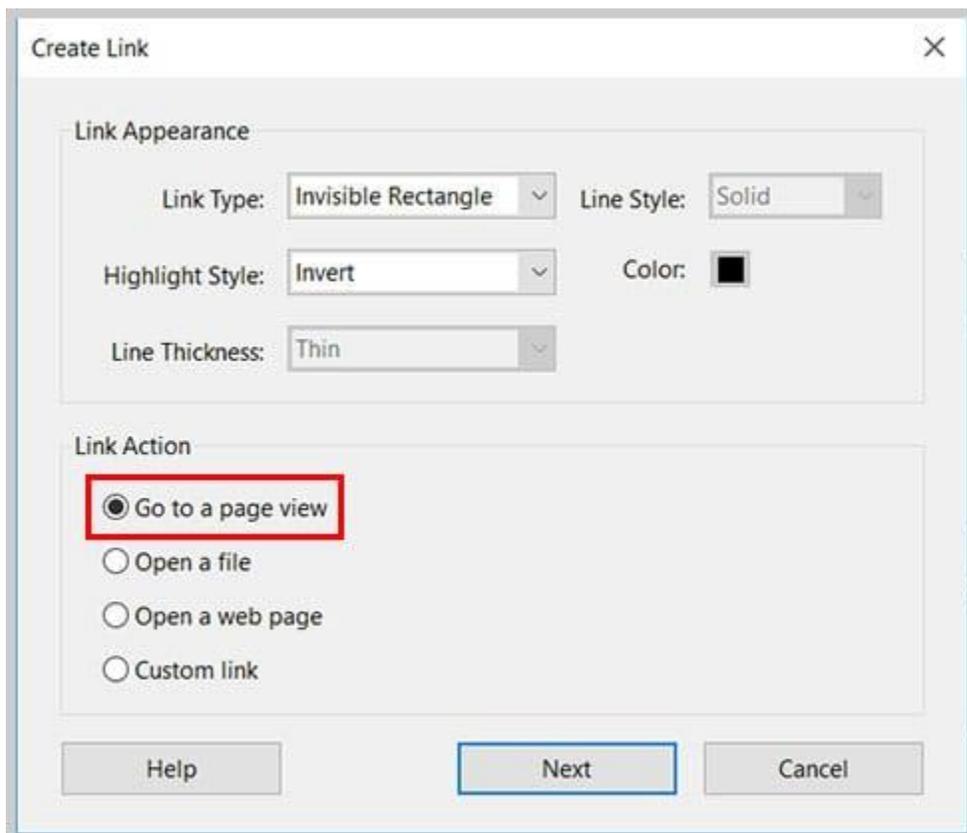


6. Select **Invisible Rectangle** or **Visible Rectangle** from the Link Type drop-down menu in the Create Link dialog box.



The invisible rectangle will be appropriate for most PDFs. If you choose a visible rectangle, you can also select the line style, thickness, and color from the Create Link dialog box.

7. Select **Go to a page view** in the Link Action section.

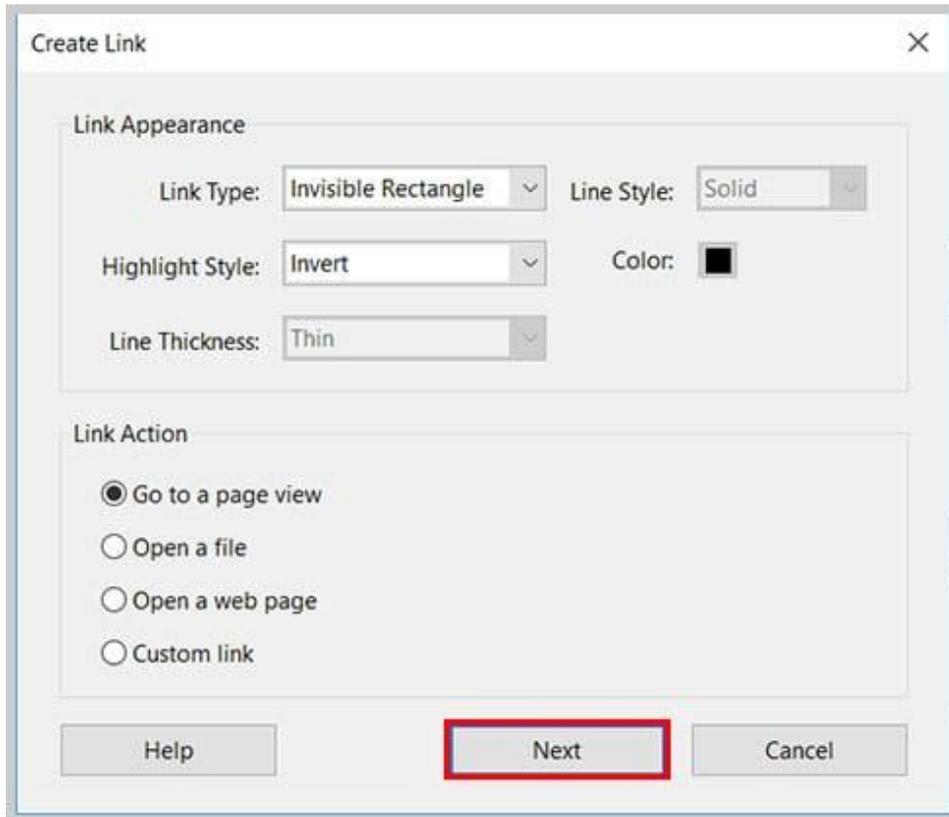


The image shows a 'Create Link' dialog box with the following settings:

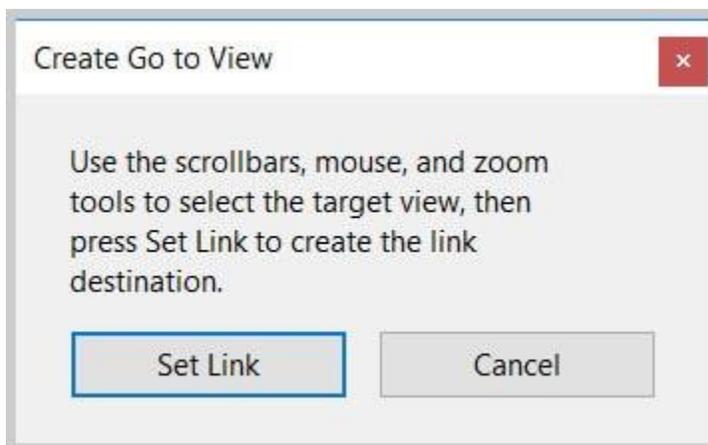
- Link Appearance:**
 - Link Type: Invisible Rectangle
 - Line Style: Solid
 - Highlight Style: Invert
 - Color: Black
 - Line Thickness: Thin
- Link Action:**
 - Go to a page view
 - Open a file
 - Open a web page
 - Custom link

Buttons at the bottom: Help, Next, Cancel.

8. Select the **Next** button.



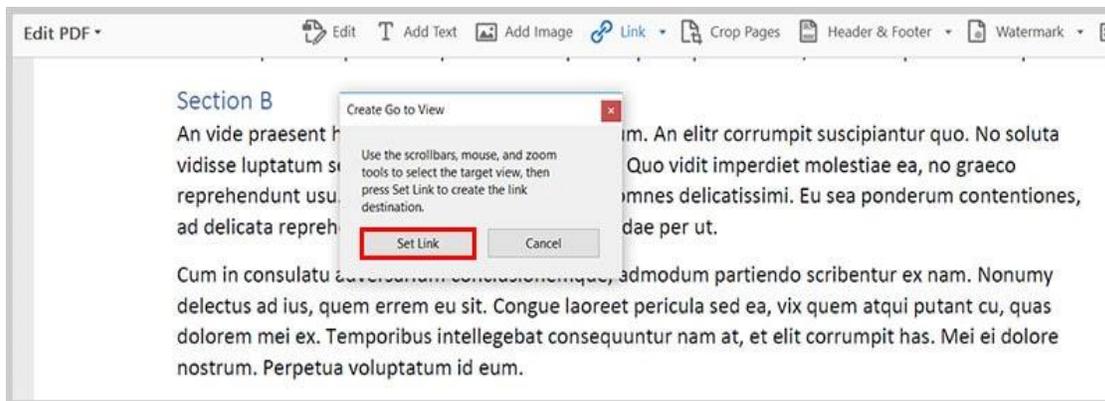
The Create Go to View dialog box will appear.



9. Scroll to the part of the document you want to link to. The Create Go to View dialog box will remain on the screen while you scroll.

Important Note: You are creating a link to the part of the document visible on your screen rather than to specific text. Visit [“Three Ways to Create Bookmarks in PDFs with Adobe Acrobat”](#) if you want to link to specific text.

10. Select the **Set Link** button in the Create Go to View dialog box when the part of the document you want to link to is visible on your screen.

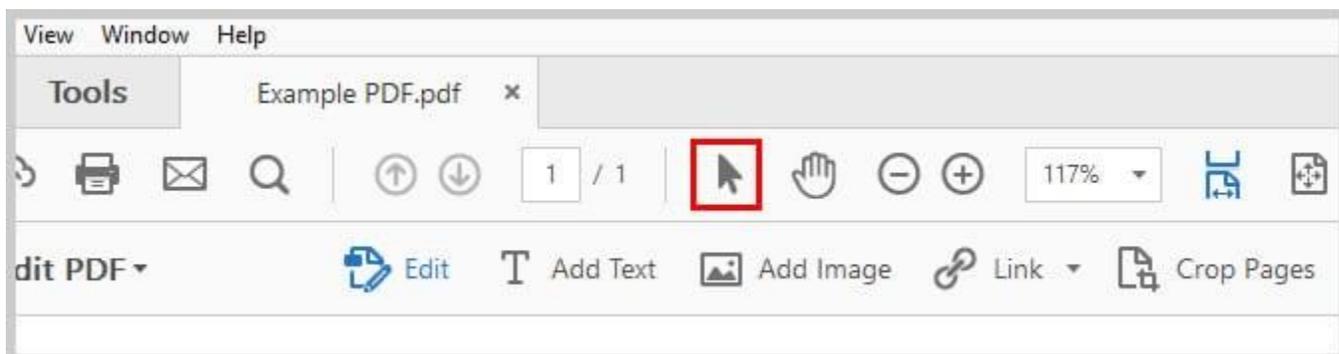


After you select the Set Link button, Acrobat will return to the text you linked to in step 5.

If you chose Invisible Rectangle in step 6, you'll still see a rectangle around the link you created until you close the Edit PDF toolbar. The rectangle won't reappear when you reopen the toolbar.

Optional Final Steps: Ensure Your Internal Link Is Working Correctly

11. Select the selection (arrow) cursor. (The link you just created won't work until the selection cursor is chosen or the Edit PDF toolbar is closed.)



12. Click the link to ensure it takes you to the correct location in your document.

13. Save your document.

4. Redacting

Redaction should be done before creating bookmarks and making the appendices text searchable. The steps below will remove bookmarks and text recognition. See Practice Book Section 4-7 for the types of information that must be redacted.

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 xxxxxxxxxxx. His home address is xxxx xxxxx xxxxxxxx xxx xxxxx xxxxxxxx. 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. Please note that document structure and searchability may be lost unless the scanner is set to automatically scan documents in OCR (optical character recognition) format.

Redacting Using Adobe Acrobat Pro

1. Open Adobe Acrobat Pro 2017

NOTE: JavaScript must be turned off - User must check to verify that Java Script is actually disabled on the PC every time they begin a new redaction session. If it is not turned off, there is potentially a hackable hole in your redaction.

2. Open a “copy of the original PDF” that has been saved to the shared folder.

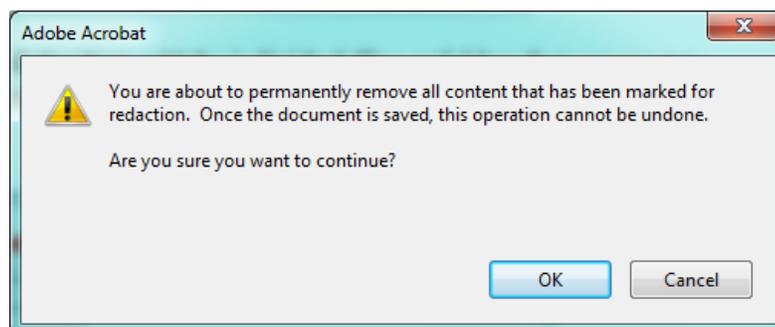
NOTE: While the Search function can be used to assist the redactor in identifying appropriate text for redaction, it should never take the place of actual human review of the document and verification that the redaction was done thoroughly and correctly.

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.

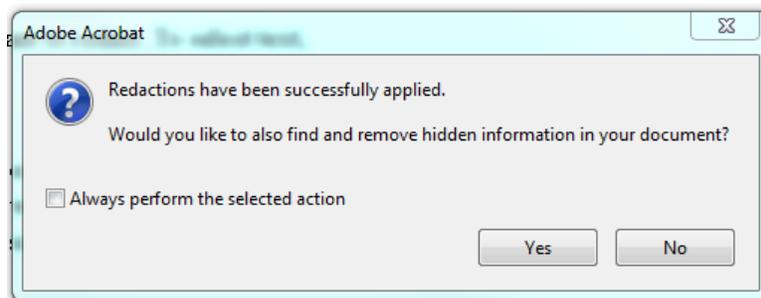
1. Place the cursor over the word marked for redaction to preview what the text will look like when redacted.
2. Once you are satisfied with the appearance, choose **Apply Redactions**.

This window will appear



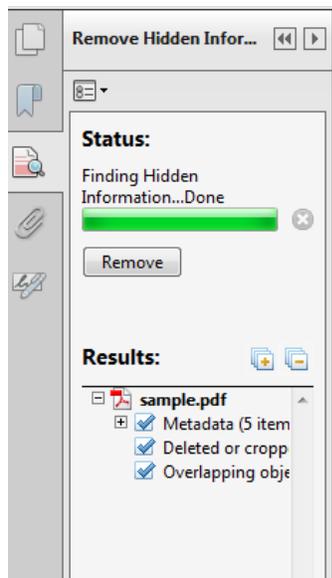
Click **OK**

When this window appears



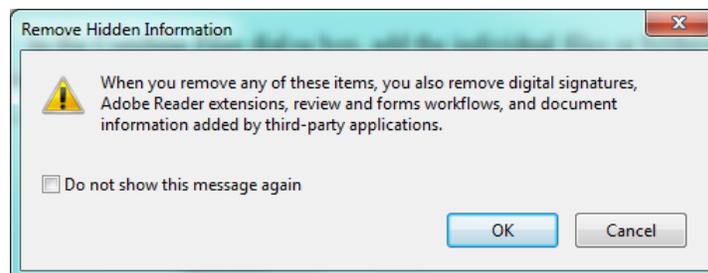
Click **Yes**

Adobe will open the panel below and find hidden information



Click **Remove**

When this window appears



Click **OK**

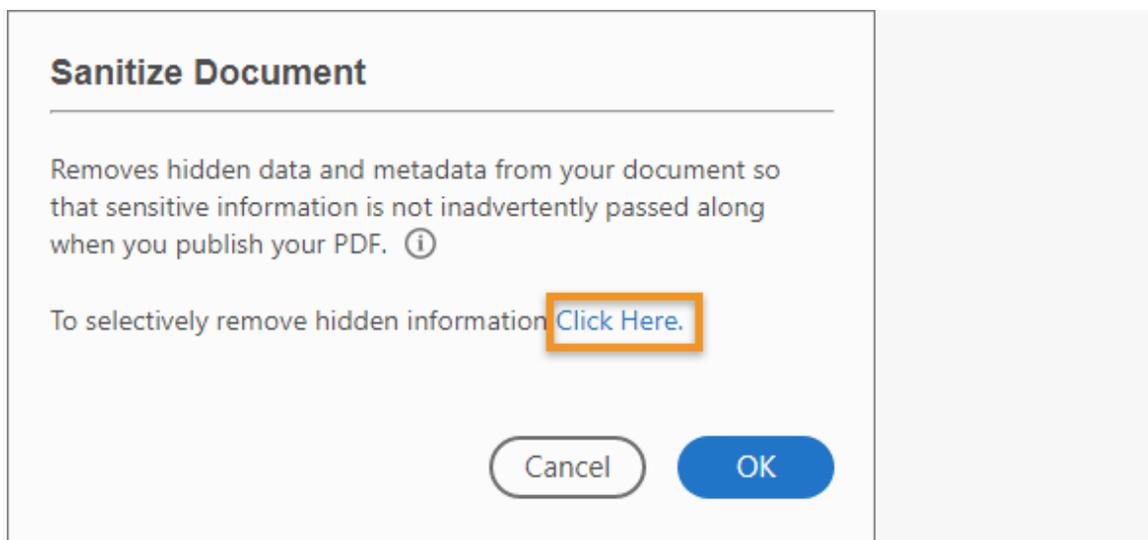
Save the document.

Sanitizing the document after redacting

1. Open the PDF in Acrobat DC, and then do one of the following:
 - Choose **Tools > Redact**.
 - On the **Edit** menu, choose **Redact Text & Images**.

The Redact toolset is displayed in the secondary toolbar.

2. Click **Sanitize Document**. In the Sanitize Document dialog, to remove hidden information, click **Click Here**.



If items are found, they are listed in the **Remove Hidden information** panel with a selected check box beside each item.

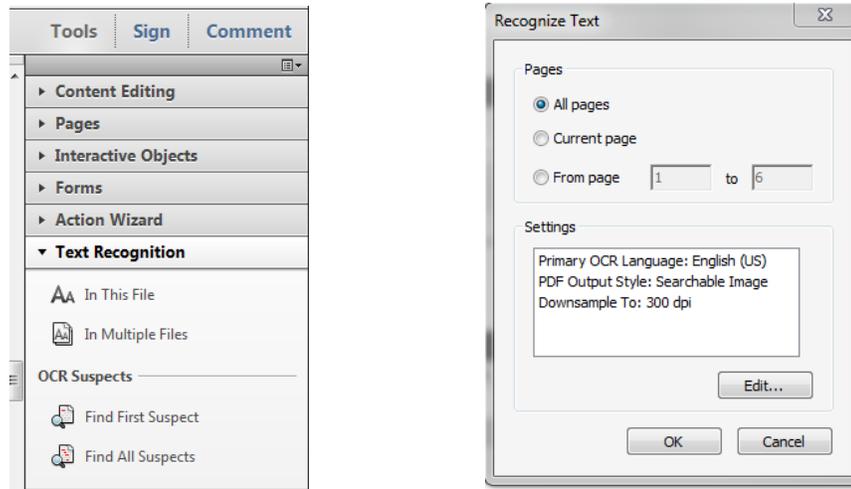
3. Make sure that the check boxes are selected only for the items that you want to remove from the document. (See [Remove Hidden Information options](#).)
4. Click **Remove** to delete selected items from the file, and click **OK**.
5. Choose **File > Save**, and specify a filename and location. If you don't want to overwrite the original file, save the file with a different name, at a different location, or both.

5. 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.

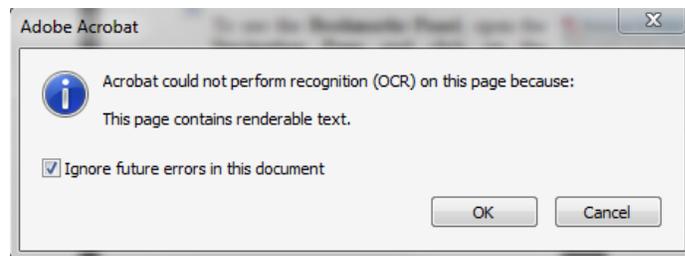
Open the document in Adobe Acrobat Pro.

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.

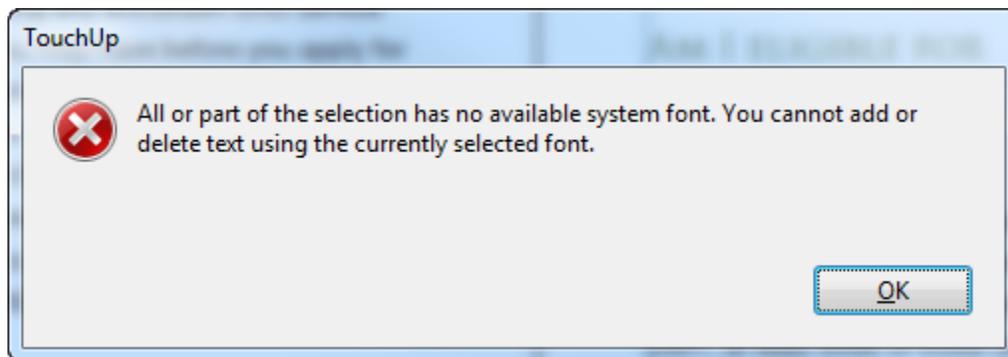


E. Fixing Mistakes in Adobe Acrobat Pro

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.

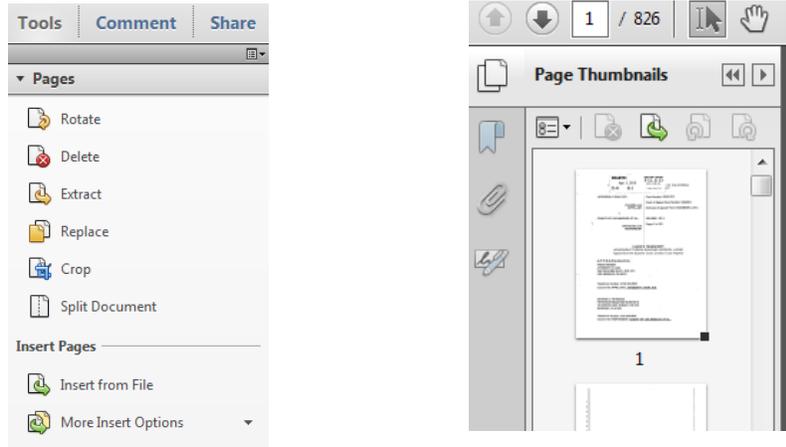


Also, the **Edit Text** tool cannot reflow all of the text in your document like a word processor, so this tool cannot be used to retype sizeable portions of your brief.

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



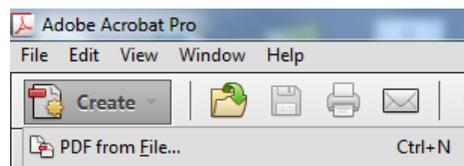
Depending on the mistake, it may just be easier to start over and recombine all your files after fixing the error in your brief. But if you have done a lot of manual bookmarking and hyperlinking, replacing the page using Adobe Acrobat may be easier than starting all over again.

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**



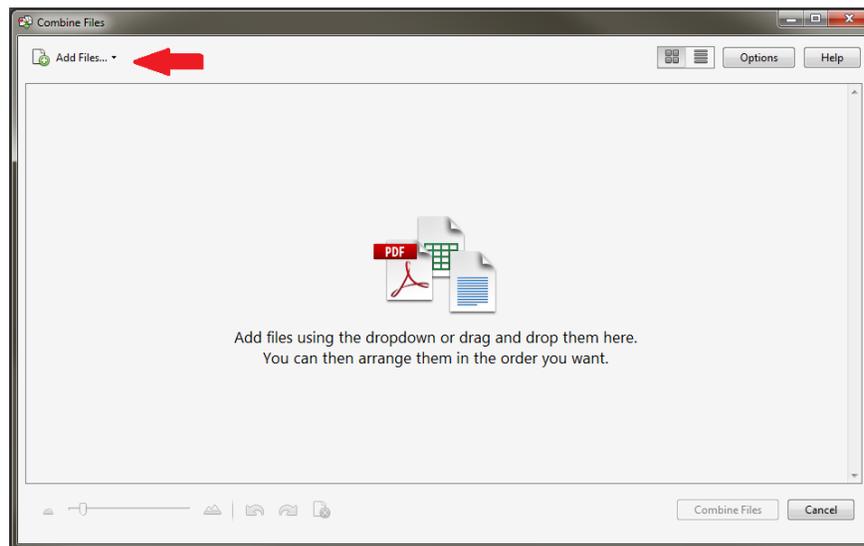
Or

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 50 megabytes in size. If a filing exceeds this file size limitation, the E-Filing system will not accept the document. Please note that audio files and video files are not permitted.

Special thanks is given to **the Courts of Appeal and Supreme Court in California for sharing their *Guide to Creating Electronic Documents/Filings***