



DRAFTING ASSISTANT FOR MAC AND IPAD

USER GUIDE

OCTOBER 2016



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1 About Drafting Assistant Office Add-In

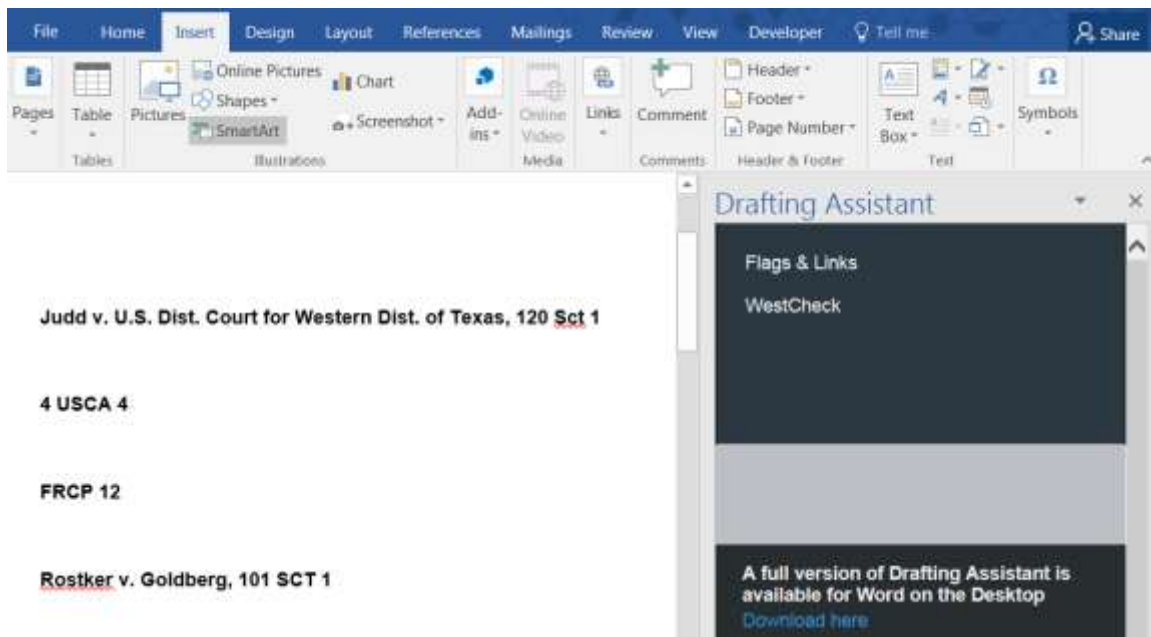
The Thomson Reuters Drafting Assistant Office Add-in provides easy access to information, research, authority, and tools to help you draft legal documents. With the Drafting Assistant Office Add-in, you can produce your best work and shave hours off the drafting process – right from your word processor. With Drafting Assistant, you can:

- Insert **KeyCite** flags for easy review and citation verification using the **Flags & Links** and **WestCheck** tools (see "About Flags & Links" on page 2 and "About WestCheck" on page 5 for more information).
- Check the status of your citations in KeyCite using **WestCheck** (see "Checking Citations" on page 6 for more information).
- Create a Cited Decisions list of cases cited by your case in **WestCheck** (see "Creating a Citations List" on page 8 for more information).
- Use WestCheck to access **QuoteRight** to verify the accuracy of quotations in your documents (see "Verifying Quotations with QuoteRight" on page 9 for more information).

Save hours of drafting time and speed up the review process with every brief, memorandum, or other legal document you draft. For detailed instruction on working with the Drafting Assistant tools, see:

- "About Flags & Links" on page 2
- "About WestCheck" on page 5

Once you launch Drafting Assistant from a supported version of Microsoft Office, the available tools display in the right pane alongside your document.



2 About Flags & Links

The Flags & Links tool allows you to view the status of cited cases, statutes, court rules, regulations, and administrative decisions in your document. Flags and links are applied to all standard long and short form citations, but you have the option to include Ids, Supras, Ibids, or to include case titles only in short form. Use the Flags & Links tool to link to full-text documents on Westlaw.

Working with Profiles in Flags and Links

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the Flags & Links tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.

CREATING NEW FLAGS & LINKS PROFILES

1. Click the **Flags & Links** tool on the side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. Secondary Source Flags).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include.
6. Select to **Include Ids, Supras, Ibids** if desired.
7. Select to **Include case titles only short form** if desired. Note that Flags & Links will be applied to all standard long and short form citations.
8. If you would like to share a document with links to Westlaw with others who do not have access to documents on Westlaw, select **Pooled Authentication**. This will allow the other users access to the links on Westlaw using you as a sponsor. Otherwise, select **Do Not Apply Authentication Settings**.
9. Click **Save**.
10. Utilize the new saved profile in the Flags & Links tool by selecting it from the **Select Profile** list, then clicking **Insert/Update**. For detailed information inserting Flags & Links, see "Working with Flags and Links" on page 2.

VIEWING, EDITING, AND DELETING FLAGS & LINKS PROFILE SETTINGS

To edit the settings for a Flags & Links profile:


1. Click the **Flags & Links** tool on the side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane.

Working with Flags and Links

Insert, update, or remove KeyCite status flags and links from the citations in your document to the full-text documents on Westlaw.

Note Some options may not be available in the Drafting Assistant Office Add-in application.

INSERTING AND UPDATING FLAGS AND LINKS

1. Click the **Flags & Links** tool on the side of your document. If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. For more information, see "Working with Profiles in Flags and Links" on page 2.
3. Select to insert **Links**, **Flags**, or both, then click **Insert/Update**.
4. You have the following options:
 - **Filter**: Filter the list of citations by flag type. Click the **Filter** button  at the top of the citations list, select the flags you wish to view, then click **Apply**.
5. Click **Finish** to return to the Drafting Assistant list of available tools. A message displays indicating the number of citations that were processed. Click **X** to close the message.

REMOVING FLAGS AND LINKS

1. Click the **Flags & Links** tool on the side of your document. If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. For more information, see "Working with Profiles in Flags and Links" on page 2.
3. Select to remove **Links**, **Flags**, or both, then click **Remove**.
4. Confirm the selection of **Links**, **Flags**, or both. Click **Remove**.
5. A message displays indicating the number of links and flags removed from the document. Click **X** to close the message.

About KeyCite Status Flags

KeyCite is a citation research service which helps you determine whether your case, statute, administrative decision, or federal regulation is good law and find cases and other sources that cite it. A red, yellow, or blue striped flag; blue H; or green C indicates that KeyCite information is available for the associated document. A KeyCite status flag lets you know immediately the status of a case, statute, regulation, rule, or administrative decision.

Red Flag

In cases and administrative decisions, a red flag warns that the case or administrative decision is no longer good law for at least one of the points of law it contains.

In statutes and regulations, a red flag warns that the statute or regulation has been amended by a recent session law or rule, repealed, superseded, or held unconstitutional or preempted in whole or in part.

Yellow Flag

In cases and administrative decisions, a yellow flag warns that the case or administrative decision has some negative history, but has not been reversed or overruled.

In statutes and regulations, a yellow flag warns that the statute has been renumbered or transferred by a recent session law; that an uncodified session law or proposed legislation affecting the statute is available (statutes merely referenced, i.e., mentioned, are not marked with a yellow flag); that a proposed rule affecting the regulation is available; that the regulation has been reinstated, corrected, or confirmed; that the statute or regulation was limited on constitutional or preemption grounds or its validity was otherwise called into doubt; or that a prior version of the statute or regulation received negative judicial treatment.

Blue Striped Flag


A blue striped flag indicates a document has been appealed to the U.S. Courts of Appeals or the U.S. Supreme Court (excluding appeals originating from agencies).

Blue H

In cases and administrative decisions, a blue H indicates that the case or administrative decision has some history.

 Green C

In cases and administrative decisions, a green C indicates that the case or administrative decision has citing references but no direct history or negative citing references. In statutes and regulations, a green C indicates that the statute or regulation has citing references.

 Unverified Red U

Citations that are unverified or that contain potential errors display with an Unverified tag next to them.

3 About WestCheck

WestCheck is an automated citation-checking tool that verifies the status of citations in your legal document or in a citations list you create manually. Use the WestCheck tool to:

- Check the status of your citations in KeyCite (see "Checking Citations" on page 6 for more information).
- Create a Cited Decisions list of cases cited by your case (see "Creating a Citations List" on page 8 for more information).
- Access QuoteRight to verify the accuracy of quotations in your documents (see "Verifying Quotations with QuoteRight" on page 9 for more information).
- Retrieve full-text versions of cited documents.

WestCheck is available via:

- Software integrated into Microsoft Word and Corel WordPerfect.
- Online software at drafting.thomsonreuters.com.
- Microsoft Word add-in.

Services Available in WestCheck

KEYCITE

Use Thomson Reuters KeyCite® citation checking service to instantly verify whether a case, statute, regulation, or administrative decision is good law, and to find citing references to support your legal argument. KeyCite integrates with the West Key Number System so you can track legal issues discussed in a case. In addition, KeyCite provides information such as:

- Direct appellate history of cases and administrative decisions.
- Negative citing references for cases and administrative decisions.
- Citations to cases, administrative decisions, secondary sources, briefs, and other court documents that have cited a case, statute, administrative decision, or regulation.
- Citations to session laws or rules amending or repealing a statute or regulation.
- Citations to proposed legislation affecting a federal or state statute.

KeyCite covers every case in the National Reporter System, as well as more than 1 million unpublished cases. KeyCite information is also available for federal and state statutes and regulations, administrative decisions from selected states, patents issued by the U.S. Patent and Trademark Office, American Law Reports (ALR) annotations, articles from hundreds of law reviews, and administrative decisions of selected federal agencies. In addition, KeyCite provides citing references from numerous texts and treatises.

FIND

When you know the citation of the document you want, WestCheck can retrieve the full text of the document and send it to a destination you choose. The Find service is available for many types of documents, including case law, statutes, regulations, administrative decisions, articles from publications such as law reviews and treatises, specialized materials (for example, OSHA inspection and enforcement reports), and materials published in foreign countries.

CITED DECISIONS

While KeyCite lists cases citing your case, the Cited Decisions service lists the cases cited by your case. Cited Decisions gives you an idea of whether the precedential value of the case you are citing has been eroded. Cited Decisions is also available for ALR annotations, law review articles, and selected administrative decisions.

Cited Decisions is a useful tool for finding hidden weaknesses in a case because it shows whether the cases on which your case relies have significant negative history. The Cited Decisions result allows you to determine at a glance which cited cases merit investigation.

- Cited cases are marked with KeyCite status flags, which indicate whether the cases have history or citing references available in KeyCite.
- Each cited case is marked with depth of treatment stars that indicate the extent to which the citing case discusses the cited case.
- Quotation marks indicate when a citing case directly quotes the cited case.

QUOTERIGHT

Use QuoteRight to verify the accuracy of quotations cited in your document. When WestCheck extracts citations from your document, it also creates a list of quotations found in your document. You can choose to have the QuoteRight service check these quotations against the full text of the documents.

Working with Profiles in WestCheck

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the WestCheck tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.

CREATING NEW WESTCHECK PROFILES

1. Click the **WestCheck** tool on the side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. KeyCite History).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include in your citations list.
6. When the WestCheck tool extracts citations from your document, it also creates a list of quotations found in your document. When a quotation is attached to a citation, the WestCheck tool compares the quotation in the user's document against the actual quotation in the cited document. QuoteRight displays the quotation text from both the user's document and the cited document, noting if the quotation is identical or different. You can also choose to ignore quotes that contain less than two to six words. The WestCheck tool extracts the citation but QuoteRight does not attach quotations with less than the specified number of words to the citations (e.g., select **2** to indicate that QuoteRight should not process quotations of less than two words). Turn this feature off by selecting **Turn off QuoteRight**.
7. Select the services (KeyCite, Find, QuoteRight, and Cited Decisions) to use to check your citations. To set KeyCite limits, click the **Select Limits** link under the **KeyCite** option (see "Setting KeyCite Limits" on page 11 for more information).
8. Select to sort the WestCheck citation list report by **Citation** or **Services (KeyCite, Find, QuoteRight, Cited Decisions)**.
9. Select to **Include short form instances, unverified cites and cites for which no services have been requested** if desired.
10. Click **Save**.
11. Utilize the new saved profile in the WestCheck tool by selecting it from the **Select Profile** list, then clicking **Extract Citation List**. For detailed information on creating a citations list, see "Creating a Citations List" on page 8.

VIEWING, EDITING, AND DELETING WESTCHECK PROFILE SETTINGS

To edit the settings for a WestCheck profile:

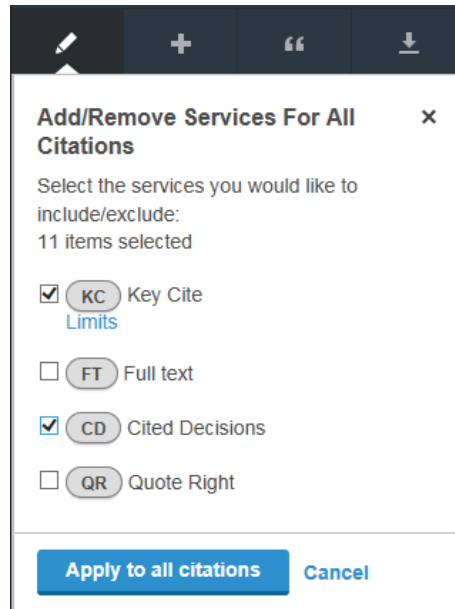
1. Click the **WestCheck** tool on the side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

Checking Citations

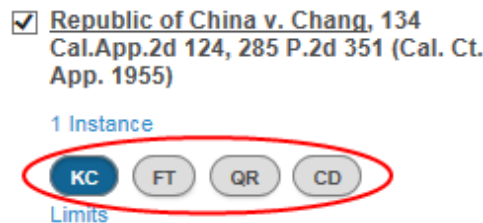
You can check your citations in the WestCheck tool using the KeyCite, Find, QuoteRight, and Cited Decisions services then create an online or offline report. Note that citations that are unverified or that contain potential errors display with an unverified tag next to them. This tag remains until the citation is corrected and the new citations list is extracted or until the citation is manually added to the list.

1. Click the **WestCheck** tool on the side of your document. If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. See "Working with Profiles in WestCheck" on page 6 for more information.
3. Click **Extract Citation List**.

4. Select the services (KeyCite, Find, Cited Decisions, QuoteRight) to use to check your citations.
 - To add/remove services for all citations, click the **Add/Remove Services** button (🔧), select the services you would like to include/exclude, and click **Apply to all citations**.



- To add/remove services for individual citations, click to add/remove the services using the buttons below the citation. To set KeyCite limits, click the **Limits** link under the **KC** button (see "Setting KeyCite Limits" on page 11 for more information).



5. To generate a report of your citations, see "Working with Reports in WestCheck" on page 11.

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Unverified Red U

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ABOUT DEPTH OF TREATMENT CATEGORIES

Examined

The citing case, administrative decision, or brief contains an extended discussion of the cited case or administrative decision, usually more than a printed page of text.

Discussed

The citing case, administrative decision, or brief contains a substantial discussion of the cited case or administrative decision, usually more than a paragraph but less than a printed page.

Cited

The citing case, administrative decision, or brief contains some discussion of the cited case or administrative decision, usually less than a paragraph.

Mentioned


The citing case, administrative decision, or brief contains a brief reference to the cited case or administrative decision, usually in a string citation.

Creating a Citations List

Extract the citations from your document and create a citations list by clicking the **WestCheck** tool on the left side of your document, then clicking **Extract Citation List**. If you are accessing Drafting Assistant from Word, begin by clicking the **Drafting Assistant** toolbar button.

ADDING CITATIONS TO THE CITATIONS LIST

Once you have extracted a citation list, you can manually add citations to that list.


1. Click the **Add Citation** button () at the top of the citations list.
2. In the **Citation** box, type the citation.
3. In the **Title** box, type a title for the citation.
4. Click **Add**.

LOCATING A CITATION IN YOUR DOCUMENT

Locating a Citation

To quickly locate a citation in your document, select it from the citations list in the left pane. The document view scrolls to the location of the citation and the citation is highlighted in your document.

Locating Inaccurate Citations

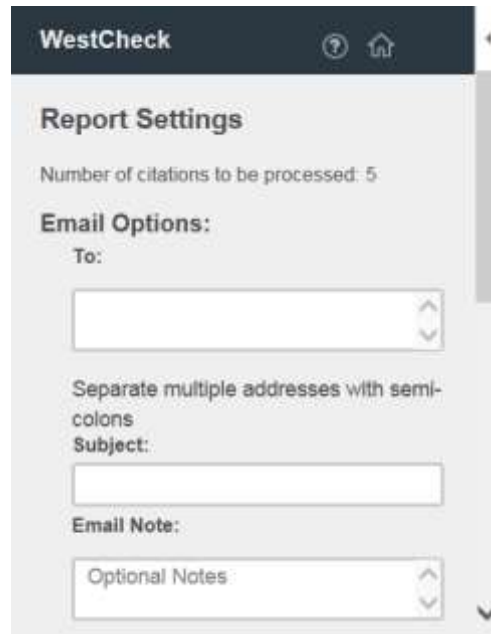
Citations that are unverified or that contain potential errors display with an unverified tag next to them (). This mark remains until the citation is corrected and the WestCheck tool is run again or until the citation is manually added to the list.

Citations that are not available with your subscription display with a red symbol displayed next to them.

DOWNLOADING, PRINTING, AND SENDING CITATIONS WITH THE OFFICE ADD-IN

To download, print, and send the entire citations list or individual citations in the list using the Drafting Assistant Office add-in, complete the following:

1. Click the check box next to the citations you want to download in the WestCheck report (see "Working with Reports in WestCheck" on page 11 for more information). If you want to download all of the citations, click the **Select All** check box.
2. Complete the required fields, and click **Generate Report**.



The screenshot shows the 'WestCheck Report Settings' dialog box. At the top, it says 'WestCheck' with a help icon and a home icon. Below that is the title 'Report Settings'. Underneath, it says 'Number of citations to be processed: 5'. The 'Email Options:' section includes a 'To:' field with a dropdown arrow, a checkbox for 'Separate multiple addresses with semi-colons', a 'Subject:' field, and an 'Email Note:' field with a text area labeled 'Optional Notes' and a dropdown arrow. A small checkmark icon is visible at the bottom right of the dialog box.

Once the email has been received, you can open and print the downloaded citations and you can send them to others via email.

Verifying Quotations with QuoteRight

Use QuoteRight to verify the accuracy of quotations cited in your document. When the WestCheck tool extracts citations from your document, it also creates a list of quotations found in your document.

If a citation is linked to a quotation, the number of available quotations for the citation is listed after the citation in your citations list. WestCheck also creates a list of quotations found in your document. You can view the extracted quotations for the entire list or you can view the extracted quotations by individual citations.

When a quotation is attached to a citation, WestCheck compares the quotation in the user's document against the actual quotation. QuoteRight displays the quotation text from both the user's document and the cited document, noting if the quotation is identical or different.

VIEWING QUOTATIONS BY INDIVIDUAL CITATION:

You must enable the QuoteRight service in the WestCheck profile that you use when extracting your citation list. When QuoteRight is enabled and citations are extracted, an **Attach Quotes** (🗉) button displays at the top of the WestCheck citations list. For more information, see "Working with Profiles in WestCheck" on page 6.

1. Click the **Attach Quotes** (🗉) button located at the top of the WestCheck citations list.
2. Select a quote from the list of quotes.
3. Detach a quotation from a citation by dragging the quotation to the **Unattached Quotes** area at the bottom of the quotes list.
4. Attach a quotation from **Unattached Quotes** at the bottom of the quotes list by dragging it to the citation you want to attach it to.
5. Optionally, select a quotation and click the Move Up (⬆️) or Move Down (⬇️) button to move it up or down in the list.

To quickly locate a quotation in your document, select it from the quotes list in the left pane. The document view will scroll to the location of the quote and the quote will be highlighted in your document.

Understanding Unverified Quotations

A quotation is considered unverified if the quotation in your document could not be found in the cited document. If you have an unverified quotation (or quotations) in your QuoteRight result, QuoteRight will deliver results according to the table below.

The following QuoteRight actions assume that you selected the option to deliver the full case if a quotation is unverified. For more information on this option, see [Modifying Report Options](#).

QUOTERIGHT SERVICE SELECTED, FIND SERVICE NOT SELECTED

The following QuoteRight actions apply when you have selected the QuoteRight service but have not selected the Find service for the citations in your citations list:

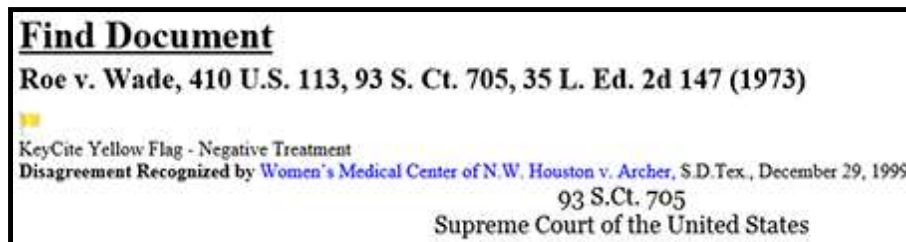
UNVERIFIED QUOTATION RESULT	QUOTERIGHT ACTION
Single unverified quotation attached to a unique citation.	Delivers the full text of the document.
One unverified quotation among multiple quotations attached to a unique citation.	Delivers the full text of the document for the unverified quotation.
Two or more unverified quotations among multiple quotations attached to a unique citation.	Delivers the full text of the document for the first unverified quotation. All other unverified quotations will not have the full document delivered.
Single unverified quotation attached to a nonunique case law citation.	Does not deliver the full text of the case. You will be instructed to narrow the citation to a particular case.
One or more unverified quotations among multiple quotations attached to a nonunique case law citation.	Does not print the full text of the case. For unverified quotations, you will be instructed to narrow the citation to a particular case.
Single unverified quotation attached to a nonunique, non-case law citation.	Attempts to deliver the document. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified citation is delivered instead of the full text of the document.
One unverified quotation among multiple quotations attached to a nonunique, non-case law citation.	Attempts to delivered the document for the unverified quotation. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified nonunique citation is delivered instead of the full text of the document.
Two or more unverified quotations among multiple quotations attached to a nonunique, non-case law citation.	Attempts to deliver the document for the first unverified quotation. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified citation is delivered instead of the full text of the document. All other unverified quotations will not have the document delivered.

QUOTERIGHT SERVICE SELECTED, FIND SERVICE SELECTED

When both the QuoteRight and Find services are selected, QuoteRight will not deliver the full case containing an unverified quotation under any circumstances because the Find service will have already delivered the full case.

Working with Reports in WestCheck

1. Once you have checked your citations in WestCheck (see "Checking Citations" on page 6 for more information), click **Create Report**.
2. Select the **Report Settings**:
 - **Delivery Options**:
 - The **Email** option provides boxes for To, Subject, Email Note, and a Format list that allows you to choose to deliver the report in Word, PDF, or RTF format. You can deliver the report to multiple email addresses.
 - **Result Options**:
 - Select **Deliver Find results separately from the report** and select Word, PDF, or RTF format to deliver all Find requests in a separate document in that format. If you select this option, you may also want to select **Create one file for all Find Results** to deliver the Find requests separately and as one single document (instead of multiple documents).
 - Select **Substitute with Reporter Images when available** to deliver PDF images of case law documents exactly as they appear in the National Reporter System. If you select this option, you may also want to select **Create one PDF for all Reporter Images** to deliver the results as a single PDF (instead of multiple PDFs).
 - Select **Dual Column Layout for Cases** to format the results in two columns per page. This option is not available for the Online Report Display.
 - **Report Options**:
 - Select **KeyCite Flags in Find Results for Cases** to display KeyCite flags and information in the Find Results (see below for example).



3. Click **Generate Report**.

ABOUT WESTCHECK REPORTS

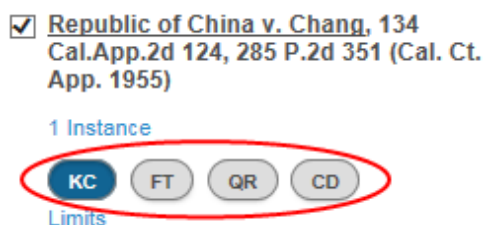
Reports generated using the WestCheck tool consist of a header, summary report, table of citations with services requested for each, detailed services reports, and a billing summary. Reports include linked KeyCite status flags (see "About KeyCite Status Flags" on page 7 for more information) and depth-of-treatment indicators (see "About Depth of Treatment Categories" on page 8 for more information) for cited documents so that you know at a glance whether your authority is good law.

The online report includes the KeyCite status flags, links to the full-text documents on Westlaw, links to the KeyCite history and citing references, and a navigational index.

Setting KeyCite Limits

Use KeyCite Limits in the WestCheck tool to restrict your KeyCite results for cases and statutes. Limiting your results is helpful if you are interested only in specific categories of KeyCite information.

You can set KeyCite Limits to apply to all citations by setting and saving the Limits in WestCheck profiles (see "Working with Profiles in WestCheck" on page 6 for more information). You can also set KeyCite Limits for individual citations using the **Limits** link under the **KC** button once you extract a citation list (see "Creating a Citations List" on page 8 for more information).



KEYCITE LIMITS

Limits for Date, Content Type, Depth of Treatment and other filters are only applied to positive Citing References included in your WestCheck report. Full Negative Treatment will always be provided.

Cases:

- Select **Include Citing References** to retrieve citing references for cases. If you select this option, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the case.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types, Depth of Treatment** (see "About Depth of Treatment Categories" on page 8), **Jurisdictions, Reported Status, and Date Range**.
- Select **Include History References** to retrieve KeyCite history for cases. If you select this option, you may also want to select **Limit History to Negative Treatment** to retrieve only the negative treatment history for the case. If you select to limit the history, you can further select to **Exclude Filings** to retrieve negative history for the case but not include citations for related court documents.

Statutes:

- Select **Include Citing References** to retrieve citing references for statutes.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types, Depth of Treatment** (see "About Depth of Treatment Categories" on page 8), **Jurisdictions, Reported Status, and Date Range**.
- Select **Include History References** to retrieve statutory history, including proposed legislation, credits, and statutory and historical notes. If you select this option, you may also want to select **Limit to Validity References** to retrieve history for the statute but limit it to validity references.

Analytical & Law Reviews:

- Select **Include Citing References** to retrieve citing references for analytical and law reviews.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types, Depth of Treatment** (see "About Depth of Treatment Categories" on page 8), **Jurisdictions, Reported Status, and Date Range**.

Patents:

- Select **Include Citing References** to retrieve citing references for patents. If you select this option, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the patent.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types, Depth of Treatment** (see "About Depth of Treatment Categories" on page 8), **Jurisdictions, Reported Status, and Date Range**.
- Select **Include History References** to retrieve KeyCite history for patents. If you select this option, you may also want to select **Limit History to Negative Treatment** to retrieve only the negative treatment history for the patents. If you select to limit the history, you can further select to **Exclude Filings** to retrieve negative history for the patents but not include citations for related court documents.

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