



# DRAFTING ASSISTANT USER GUIDE

SEPTEMBER 2022



THOMSON REUTERS™

# Customer Service

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## Technical Assistance

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## Reference Materials

For free reference materials, visit <https://legal.thomsonreuters.com/en/support/drafting-assistant>. Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

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# About Drafting Assistant

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

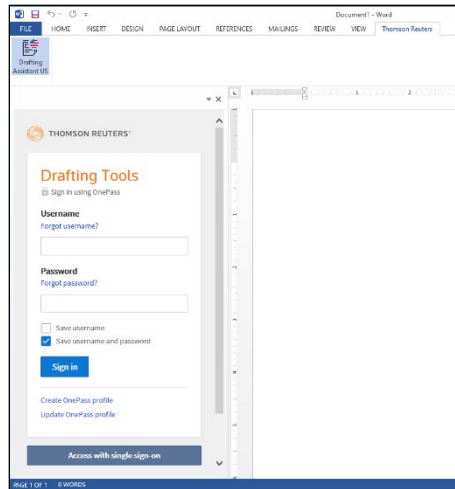
- Convert **PDF files to Word documents** to utilize Drafting Assistant features on these files. (see [About PDF Converter](#) for more information).
- Utilize **Templates and Sample Documents** to speed up the drafting process (see [About Templates & Sample Documents](#) for more information).
- Search West Km and **Westlaw** and incorporate information in your draft documents (see [About Search Westlaw](#) and [About Search km](#) for more information).
- Quickly find authority for language in your document using **Locate Authority** (see [About Locate Authority](#) for more information).
- Quickly analyze your legal document to review recommended authorities that may be missing (see [About Westlaw Edge Quick Check](#) for more information).
- Ensure correct citation formatting using *The Bluebook*, *ALWD Citation Manual*, or other jurisdiction-specific rules, with the **Cite Formatting** tool (see [About Cite Formatting](#) for more information).
- Check the status of your citations in KeyCite using **WestCheck** (see [About WestCheck](#) for more information).
- Create a Cited Decisions list of cases cited by your case in **WestCheck** (see [Creating a Citations List](#) for more information).
- Use WestCheck to access **QuoteRight** to verify the accuracy of quotations in your documents (see [Verifying Quotations with QuoteRight](#) for more information).
- Insert a table of authorities into your documents with the **TOA Builder** tool (see [About TOA Builder](#) for more information).
- Insert **KeyCite** flags for easy review and verify citations using the **Flags & Links** and **WestCheck** tools (see [About Flags & Links](#) and [About WestCheck](#) for more information).
- Use the **Document Formatting** tool to verify whether your document is formatted in accordance with your jurisdiction's court rules (see [About Validate Document Formatting](#) for more information).
- Create a package of all important legal sources referenced in your document using **Authority Compiler** (see [About Authority Compiler](#) for more information).
- Launch **Firm Central** and **Practical Law** (for more information, see [About Practical Law](#) and [About Firm Central](#) for more information).
- Build documents from templates created for your organization in Contract Express with the **Build Document** tool (see [About Build Document](#) for more information).
- Retrieve sample agreements and clauses from those agreements related to specific contract clauses in your document (see [About Locate Precedent](#) for more information).
- Analyze and review document drafts to find and address potential errors, omissions, and inconsistencies using **Deal Proof** (see [About Deal Proof](#) for more information).
- Use Draft Insights while Drafting Assistant is closed to alert you to critical case history of cited cases in your document (see [About Draft Insights](#) for more information).

## Accessing Drafting Assistant Tools from Your Word Processor

To work with the Drafting Assistant tools while drafting a document in Word:

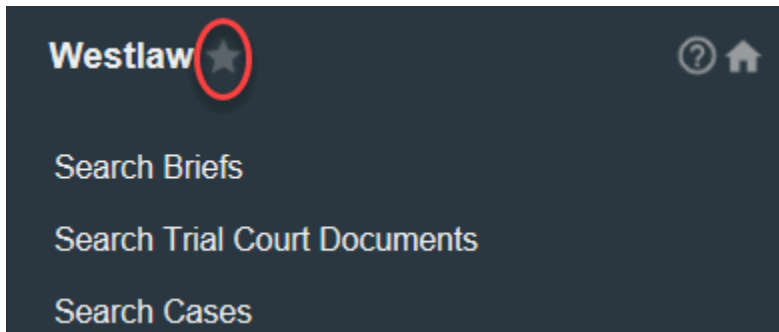
1. Open your legal document in Microsoft Word.
2. Click the Thomson Reuters tab.
3. Click the Sign in button or the Drafting Assistant US button in the Word ribbon.

- At the prompt, sign in with your OnePass credentials, and choose a registration key and/or client identifier, if applicable. The Drafting Assistant tools display in the left pane alongside your document.

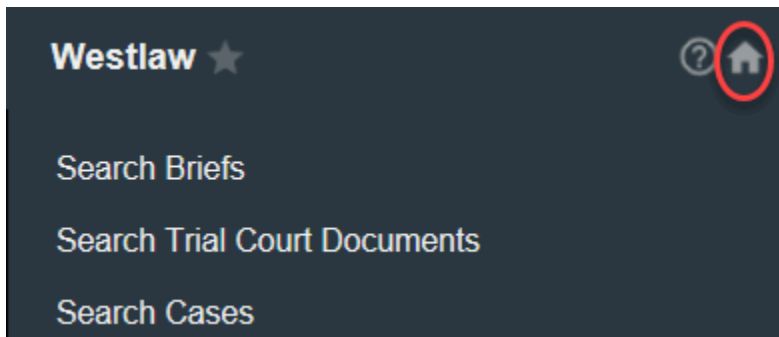


## SETTING DRAFTING ASSISTANT FAVORITES

You can make many Drafting Assistant features your landing page, if you want to go directly to that feature after sign on. A star next to a feature indicates it can be made a Favorite. Click the star and choose to "Set as start page."



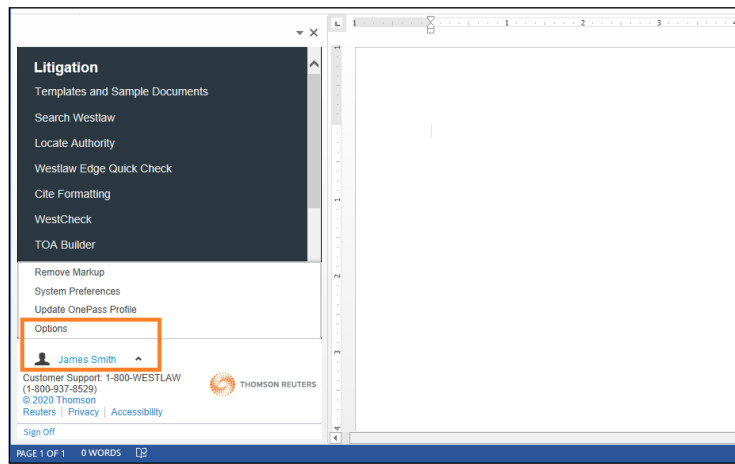
If you want to go back to the feature list, click the Home icon or the Drafting Assistant US button in the ribbon.



If you want to remove a Favorite, click the star next to the feature again, or, if you want to select a new favorite, click the star next to that new feature and click **Continue**.

## SETTING DRAFTING ASSISTANT OPTIONS

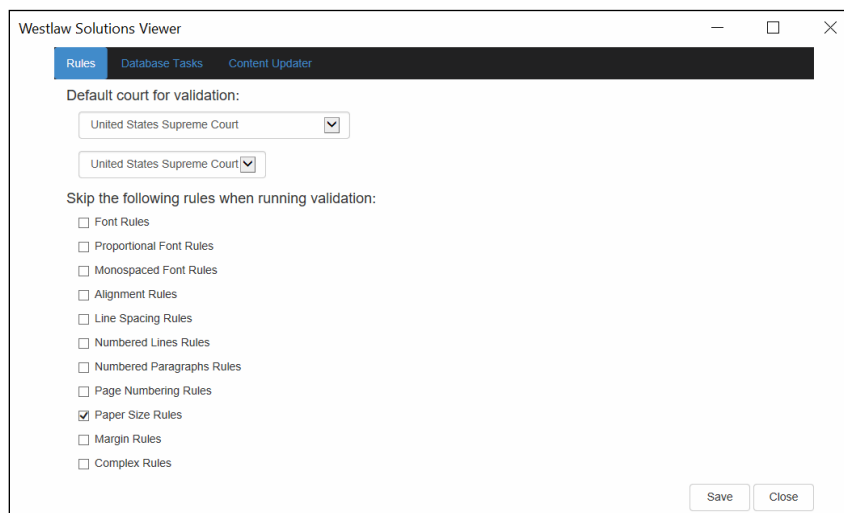
You can customize certain aspects of Drafting Assistant in Word by clicking the User icon, and then **Options**. For example, you can select a default jurisdiction for Validate Doc Formatting, and choose whether to update Templates and Sample Documents content automatically or manually.



### Setting a Default Jurisdiction for Validation

Select a default jurisdiction and select rules to omit when using Validate Doc Formatting in Drafting Assistant.

1. Click **Options** on the Drafting Assistant toolbar in Word, and click the **Drafting Assistant** tab.
2. Click **Rules** at the top of the window.
3. Select a jurisdiction from the **Default Court for Validation** list.
4. Optionally, select rules to omit from the **Skip the Following Rules When Running Validation** list of options.
5. Click **Save** to apply changes.
6. Click **Close**.

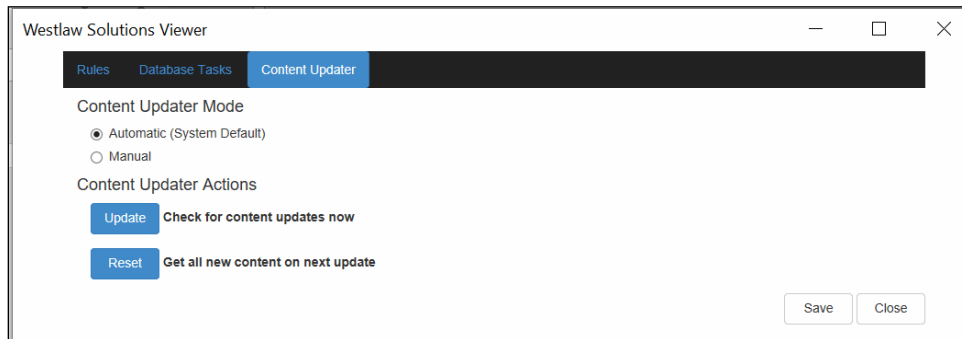


### Customizing Content Updates

When you install Drafting Assistant, model documents and sample forms are automatically installed with the software and are available in the Templates and Sample Documents folders. Drafting Assistant allows you to customize your content updates.

1. Click **Options** on the Drafting Assistant toolbar in Word, and click the **Drafting Assistant** tab.

2. Click **Content Updater** at the top of the window.
3. By default, Drafting Assistant automatically updates content. To change the update mode to manual updates, select **Manual**. To manually update content:
  - Click **Update** to check for content updates now.
  - Click **Reset** to get all new content on the next update.
4. Click **Save** to apply changes.
5. Click **Close**.

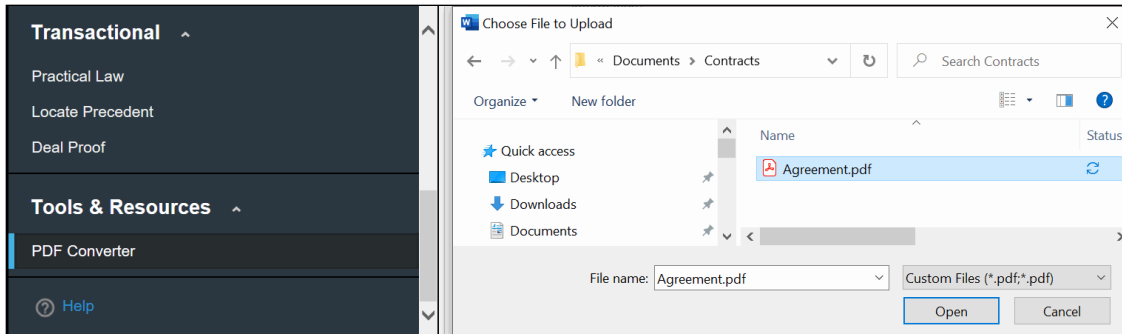


# About PDF Converter

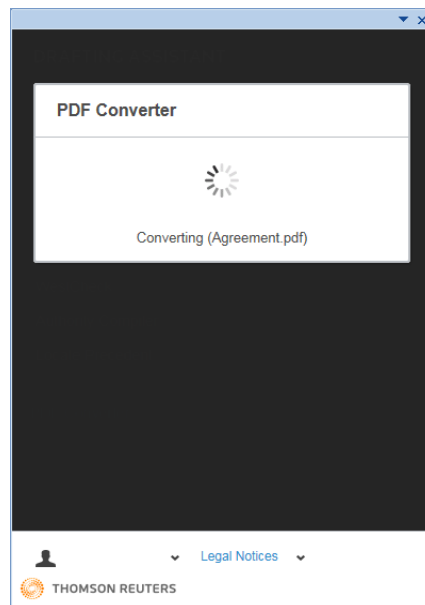
If the document you need to work with is a searchable or image-based PDF, it is possible to convert that file to a Word document to utilize tools available in Drafting Assistant for that document. As the PDF is converted, any image-based text will be converted to plain text using Optical Character Recognition services.

To convert a PDF using Drafting Assistant

1. Click **PDF Converter**.
2. In the next window, select the PDF you want to convert.



Drafting Assistant will automatically begin converting the PDF into a Word document. When the process is complete, the converted document will appear in a new instance of Microsoft Word. The tools menu will be open for you in the converted document for you to use applicable Drafting Assistant features and functionality.



# About Templates and Sample Documents

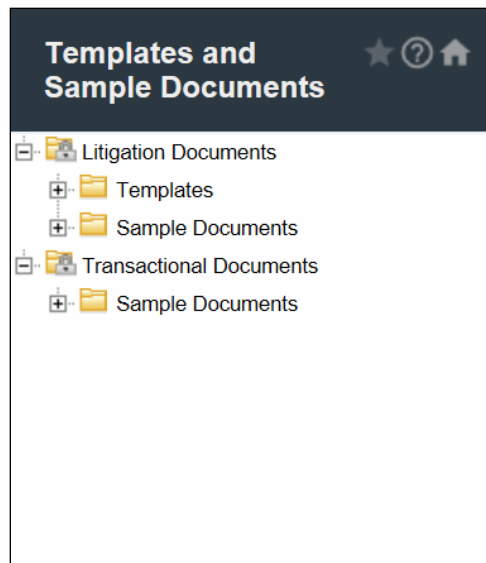
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Drafting Assistant provides templates and sample documents from your jurisdiction to assist you in drafting your own documents.

## Using Templates & Sample Documents

To access a template or sample document:

1. Click **Templates and Sample Documents**.
2. In the **Templates & Sample Documents** category on the left, expand or collapse the folders provided and double-click to open a template or sample document as a new document.

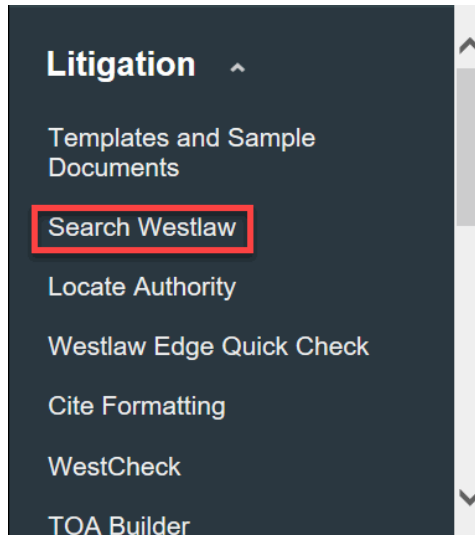


# About Search Westlaw

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You can access Westlaw directly from Drafting Assistant and then add information from your search result to your draft document. The **Search Westlaw** tool allows you to easily retrieve briefs, motions, cases, statutes, KeyRules, and forms.

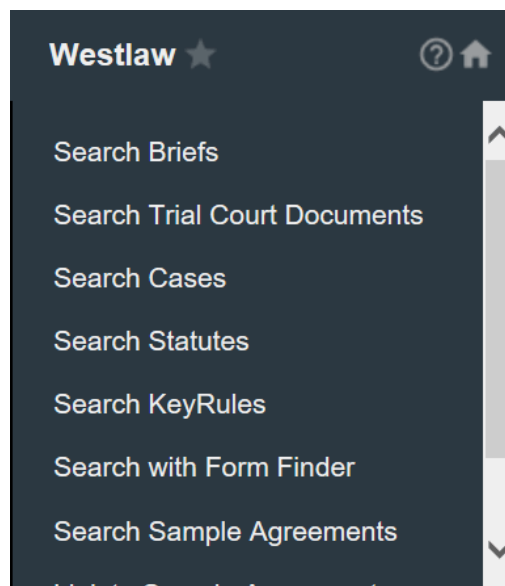
For complete information on using Westlaw, visit [legalsolutions.thomsonreuters.com/law-products/westlaw-legal-research/training-support](https://legalsolutions.thomsonreuters.com/law-products/westlaw-legal-research/training-support) to view and download user guides, explore training options, and watch tutorial videos.



## Searching Westlaw

To retrieve a case on Westlaw, complete the following:

1. Click **Search Westlaw**.
2. Select a category from the left. To browse the content, simply click a category on the search page.



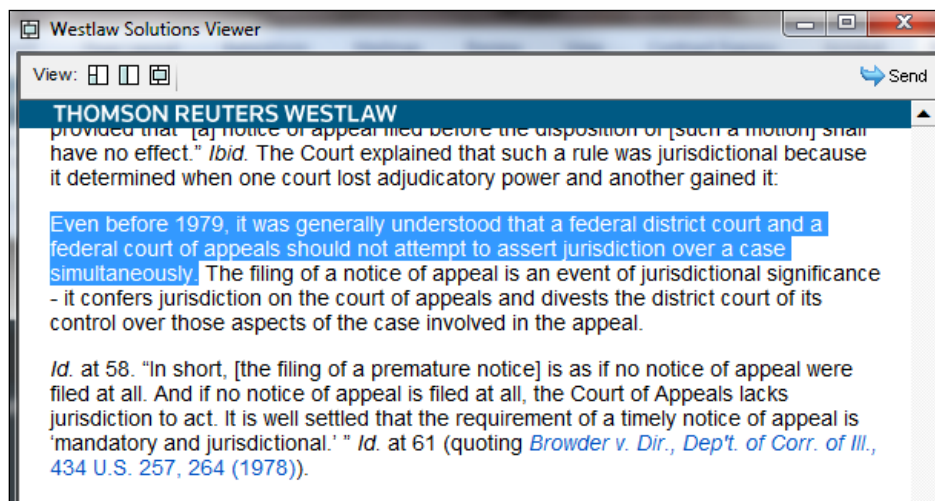
- Optionally, type a Terms and Connectors query or keywords describing your issue in the search box and click the **Search** button. Westlaw recognizes whichever search format you use. To select a different state or federal jurisdiction, click **Change**, select your desired options, and click **Save**.



### VIEWING A SEARCH RESULT

View the results of your search using any of the following options:

- Click the link for a document to display the full text of a document in the document view. You will be able to view West Key Numbers, Headnotes, full text cases, and statutes with annotations, all within your word processor.
- To copy text from a Westlaw document and insert it into your draft document, select text in the Westlaw document view and click **Send**. The text you have selected will be placed in your document at the location of the cursor. The corresponding citation for the Westlaw document will be inserted with the text you selected according to your Westlaw citation format preferences.
- You can also select text in the document view and drag it to your draft document. Note that using this method will not place the citation reference in your document.



# About Locate Authority

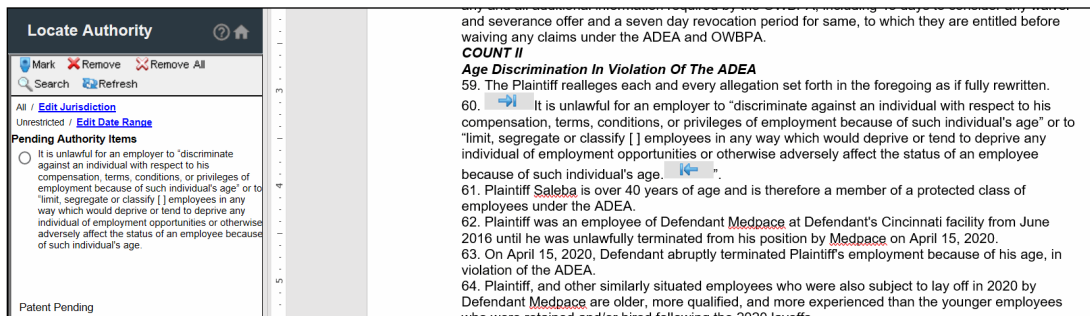
The Locate Authority feature in Drafting Assistant allows you to quickly find authority for language in your draft document. Locate Authority marks the text in the draft document and searches Westlaw for cases that best fit the text. From the result list, you can easily insert the citation into your draft document. Additionally, you can see how others have cited that case.

If you have a subscription to Westlaw, your search for authority is automatically run in Westlaw.

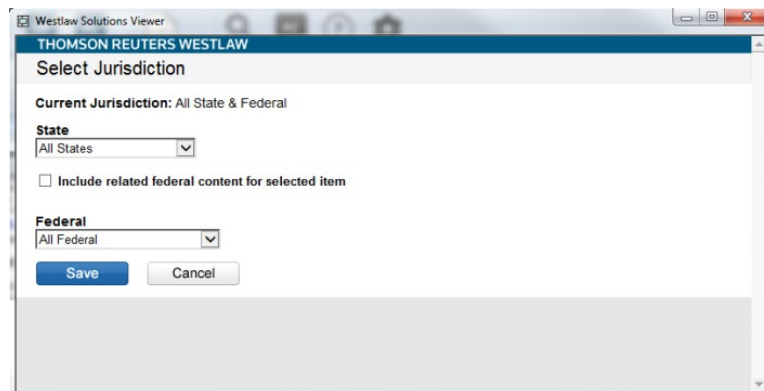
## Locate Authority

To locate authority with Westlaw, complete the following:

1. Click **Locate Authority**.
2. Select the text in the draft document for which you want to locate authority.
3. Click **Mark** in the Locate Authority category. A mark is placed at the beginning and at the end of the selected text and the text displays under Pending Authority Items in the left pane. You can mark more than 4,000 text selections in a document.
4. By default, all jurisdictions for supporting authority are searched. To restrict the search to specific jurisdictions, click **Edit Jurisdiction** in the left pane. If you do not want to restrict the search by jurisdiction, skip to step 10.

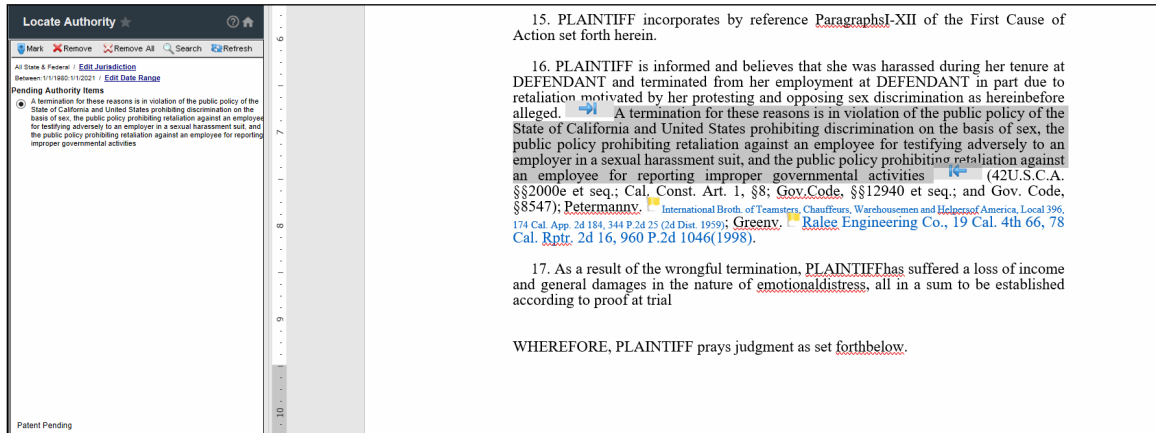


5. In the **State** list, click a different state, if desired.
6. Select the **Include related federal content for selected item** check box, if desired.
7. In the **Federal** list, click a federal jurisdiction, if desired.
8. Click **Save**. The jurisdictions display next to Edit Jurisdiction in the left pane.

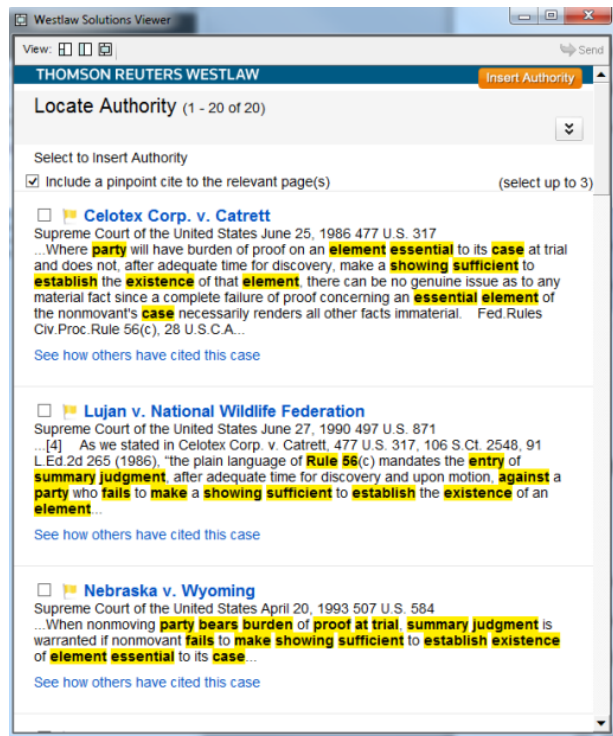


9. Click **Edit Date Range**, if desired. Click the calendar icon to select a date or type a date in the appropriate box, and then click **Save**.
10. Under Pending Authority Items, select the text for which you want to locate the authority, and then click **Search**.

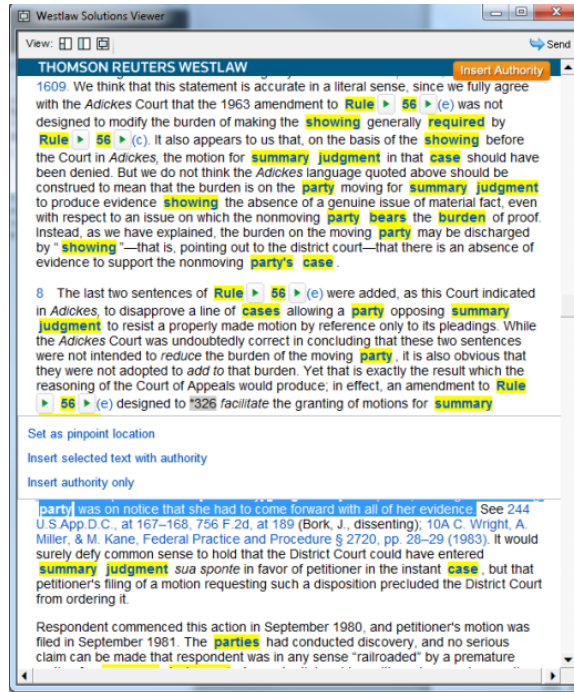
If you did not restrict the search by jurisdiction or by date, you will be prompted to sign on to Westlaw before the result list displays. To remove a selected text item under Pending Authority Items, select the text and click **Remove**. To remove all selected text under Pending Authority Items, click **Remove All**.



11. Select the check box next to the case with the citation you want to insert in the document and click **Insert Authority** at the top of the viewer. After you insert the citation, the marks are removed from the text and a check box displays next to the language in the left pane. Click **See how others have cited the case**, if available, to view how other cases have cited your case.
12. Optionally, select the check box to **Include a pinpoint cite to the relevant page(s)** to include a pinpoint cite when inserting the authority into the document.



13. Select up to three cases with the citations you want to insert.
14. Click a case name link to navigate to the language shown for the case in the result list.
15. If you selected to Include a pinpoint cite to the relevant page(s), you can highlight language in the case in order to Set as pinpoint location to choose a new pinpoint page location for purposes of inserting authority, Insert selected text with authority, or Insert authority only to include the pinpoint location of the text you selected when inserting authority.



# About Westlaw Edge Quick Check

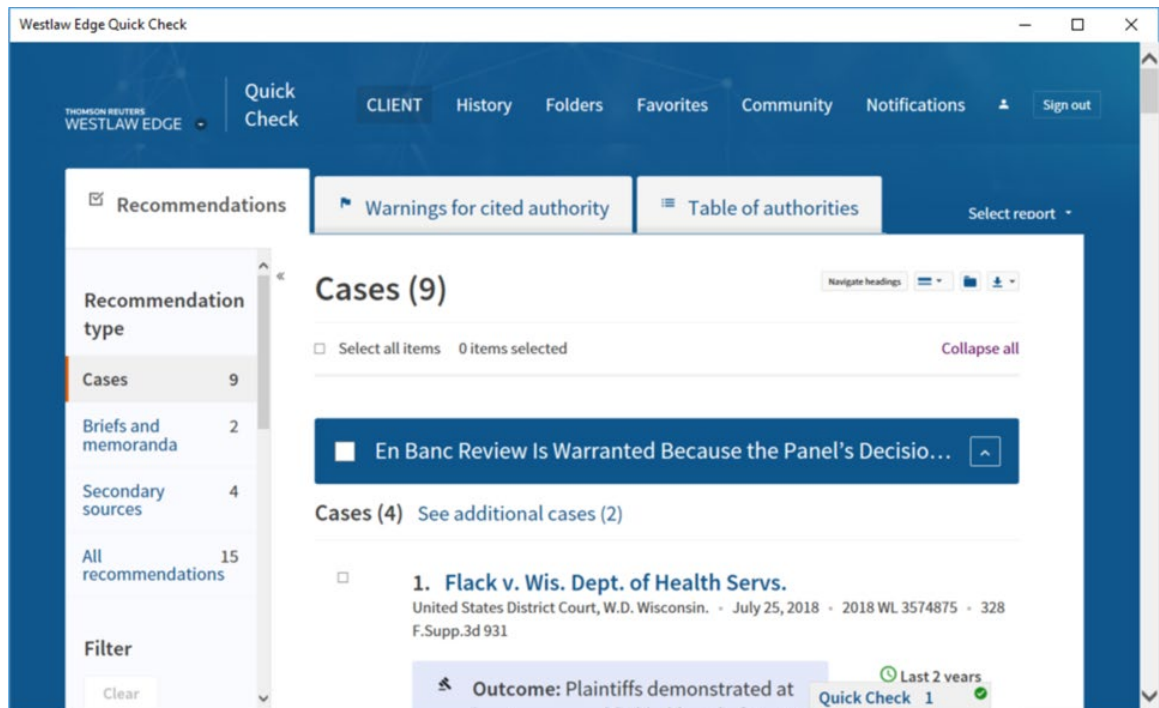
The Quick Check feature in Drafting Assistant allows you to quickly analyze your legal document to review recommended authorities that may be missing.

Drafting Assistant offers integration with Quick Check for Westlaw Edge subscribers.

## Westlaw Edge Quick Check

To use Westlaw Edge Quick Check, complete the following:

1. Click **Westlaw Edge Quick Check**.
2. If applicable, select a registration key and client ID when prompted.
3. View the Quick Check Recommendations.



4. Use Copy with Reference to extract text from those recommendations and paste the text, including a properly formatted citation, into your document.

# About Cite Formatting

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The Cite Formatting tool checks citations in your legal document and suggests the correct citation format. Use the Cite Formatting tool to:

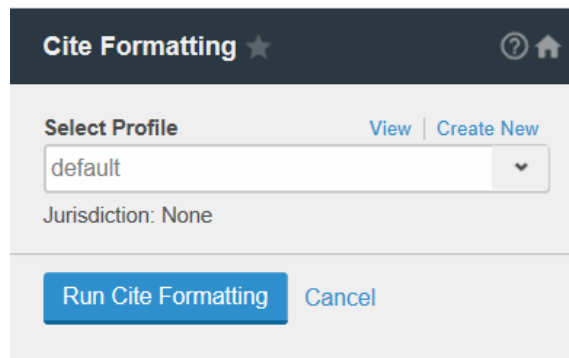
- Identify legal citations (cases, statutes, court rules, regulations, constitutions, administrative decisions, and journal and law review articles) in your document.
- Suggest citations from *The Bluebook: A Uniform System of Citation*, the *ALWD Citation Manual*, or a citation style specific to a state.
- Apply correct formatting directly to your document while giving you complete control over which citation changes to make.

## Working with Profiles in Cite Formatting

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 Cite Formatting tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

### CREATING NEW CITE FORMATTING PROFILES

1. Click **Cite Formatting**.
2. Click **Create New**.



3. Type a name for the new profile in the **Profile Name** box (e.g., Underlined Citations).
4. Select a **Jurisdiction** from the list.
5. Select the **Rules for Citation** from the list.
6. Select a set of desired **Citation Styles** from the list (**Legal Briefs** or **Law Reviews**).
7. Select the content categories you would like to include in your citations list.
8. Select the **Formatting Preferences** you wish to apply to the citations. Options include:
  - **Underline appropriate citation elements.**
  - **Italicize appropriate citation elements.**
  - **Include Subsequent History.**
9. Select **Auto accept matched citations** to automatically mark a citation in the cite list as accepted (with the green checkmark symbol) when a citation matches any one of the suggested alternatives for that citation.
10. Select to include **Ids, Ibids, Supras, and Case Title only short forms** if desired.
11. Select an option to work with **Parallel Citations**:
  - **Allow West Cite Advisor to suggest which citations to include.**

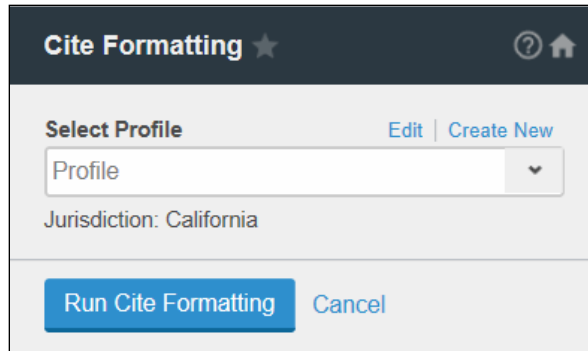
- **Include only one citation per authority cited.** If you select this option, you can choose whether to **Cite to the official reporter if possible** or to **Cite to West's National Reporter system if possible**.
  - **Include Citations to all available reporters.**
11. Select an option to apply to Statutes:
    - **Use the publication validated by Drafting Assistant.**
    - **Use the official statute publication (e.g., U.S.C.).**
  12. Click **Save**.

13. Utilize the new saved profile in the Cite Formatting tool by selecting it from the **Select Profile** list, then clicking **Run Cite Formatting**. For detailed information on checking citation formatting, see "Working with Cite Formatting" on page 20.

## VIEWING, EDITING, AND DELETING CITE FORMATTING PROFILE SETTINGS

To edit the settings for a Cite Formatting profile:

1. Click the **Cite Formatting** tool on the left 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.

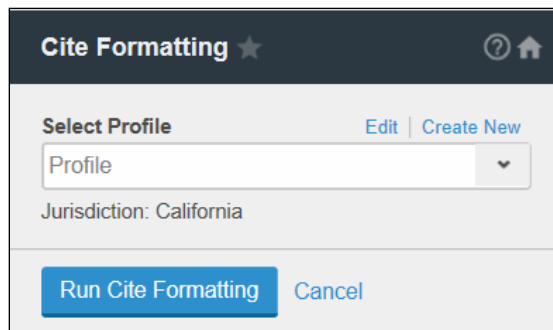










4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

### Working with Cite Formatting

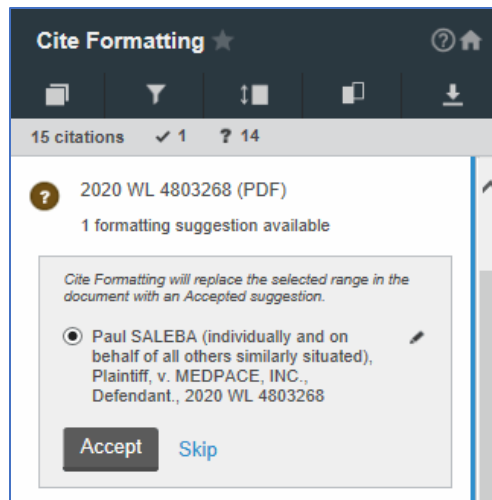
Check citations in your legal document, view suggestions for the correct citation format, and make formatting changes using the Cite Formatting tool.

1. 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 Cite Formatting" on page 18. Click **Cite Formatting**.
2. Click **Run Cite Formatting**.

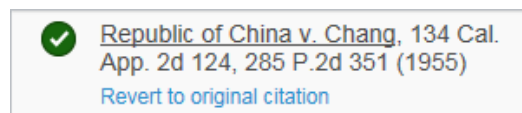


3. Each citation displays in a list in the left pane and the citations status is displayed at the top of the Cite Formatting tool. Citation formats are marked as:
  -  Suggestion matches the document text or a suggestion has been accepted.
  -  No suggestions are available.
  -  Multiple suggestions available. Choose a suggestion and click **Accept**.
4. Optionally, click the **Group By**  button at the top of the citations list to group citations by **Citation Status** or **All instances of a Citation**. You can also click the **Group By** button and select **Restore Default View** to return to the default view.
5. Optionally, click the **Filter** button  at the top of the citations list to filter by content type, citation format, and citation type. Select the options you wish to view, then click **Apply**.
6. Optionally, click the **Collapse/Expand All Suggestions** button  to display or hide all of the suggestions for each citation.
7. Optionally, click the **Show Changes** button  to **Show Format Differences** or **Show Content Differences** between the existing citation and suggestion. You can also select the **Restore Default** button to return to the default view.
8. Optionally, click the **Download Cite Formatting Report** button  to share a copy of the citations and suggestions with a colleague. The Cite Formatting report will retain any filters, groupings, and accepted suggestions applied.

- Citations with formatting suggestions offer options for formatting. Select an option and click **Accept**. The status of the citation formatting displayed at the top of the Cite Formatting tool updates.



- Optionally, you can revert to the original citation formatting after accepting a suggestion by clicking **Revert to original citation**.



- Once you complete formatting your citations, click **Finish** to exit the tool.

# About WestCheck

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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 25 for more information).
- Create a Cited Decisions list of cases cited by your case (see "Creating a Citations List" on page 28 for more information).
- Access QuoteRight to verify the accuracy of quotations in your documents (see "Verifying Quotations with QuoteRight" on page 30 for more information).
- Retrieve full-text versions of cited documents.

WestCheck is available via:

- Software integrated into Microsoft Word Online software at [drafting.thomsonreuters.com](https://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

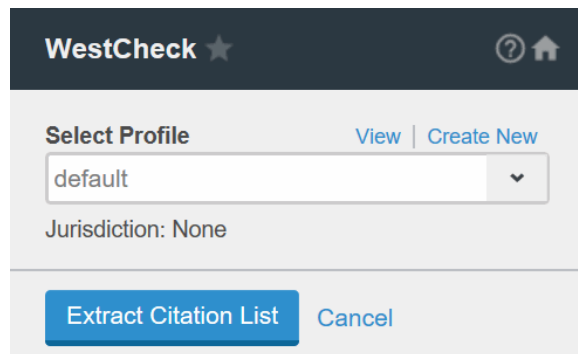
Use QuoteRight to verify the accuracy of quotations cited in your document. When WestCheck extracts citations from your document, it also creates a list of quotations found in your document. You can choose to have the QuoteRight service check these quotations against the full text of the documents.

## 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.

### CREATING NEW WESTCHECK PROFILES

1. Click **WestCheck**.
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 33 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** in the WestCheck summary, if desired. If you select this option, you can choose whether to:
  - **Include unverified citations and citations for which no services were selected into the report body.**
  - **Include short form instances into the report body and Include QuoteRight for short form instances into the WestCheck Report.**
10. Click **Save**.

**WestCheck** ★

Profile Name:  
Profile

Select Jurisdiction:  
None

**Select Content Categories**

- Cases
- Statutes
- Regulations
- Court Rules and Orders
- Administrative Reports and Decisions
- Secondary Sources
- Other Authorities

**QuoteRight**

- Turn off QuoteRight

Ignore quotes that contain words less than:  
6

**Select Services**

- KeyCite
- [Limits](#)
- Full Text
- QuoteRight
- Cited Decisions

**Sort Report by:**

- Citation
- Services (KeyCite, Full Text, QuoteRight, Cited Decisions)

**Other**

- List all citations in the WestCheck Summary including short form instances, unverified citations and citations for which no services have been requested
- Include unverified citations and citations for which no services were selected into the report body

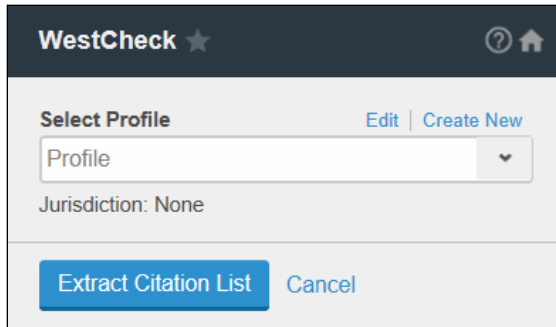
**Save** **Cancel**

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 28.

## VIEWING, EDITING, AND DELETING WESTCHECK PROFILE SETTINGS

To edit the settings for a WestCheck profile:

1. Click **WestCheck**.
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.

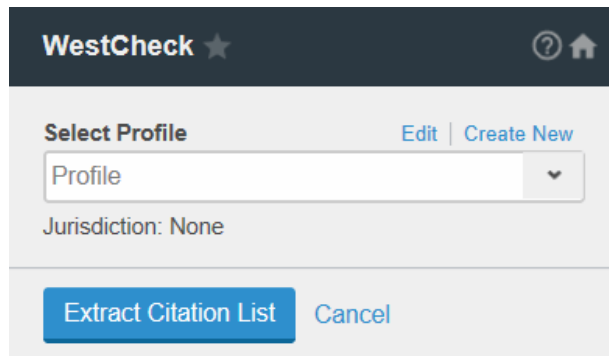


4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

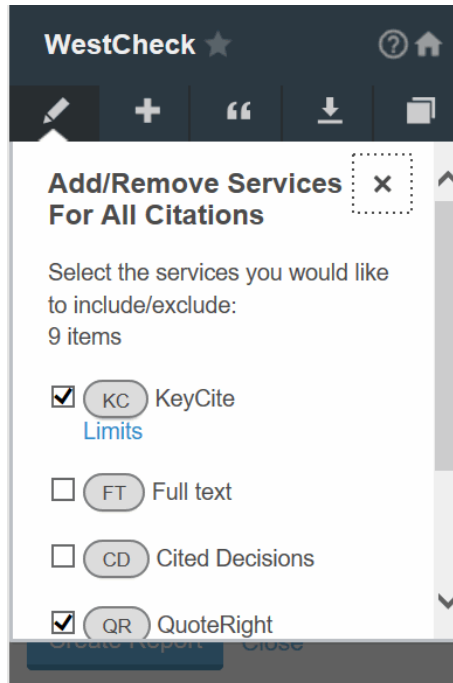
### Checking Citations

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 **WestCheck**.
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 23 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 33 for more information).



- To generate a report of your citations, see "Working with Reports in WestCheck" on page 32.

## 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.

### Red Striped Flag

A red striped flag indicates that a case is no longer good for at least one identified point of law.

### Overruling Risk Icon

In cases, an Overruling Risk icon warns that the case relies on another case or proposition from another case that has been explicitly overruled. For example, Case A is explicitly over-ruled or abrogated by Case B, but Case C,

which cites case A for the same proposition that was overruled is not mentioned in Case B. Case C is implicitly overruled by Case B, and thus will display the Overruling Risk warning.

### 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.

### Red M

The red M indicates that the case title provided in the document does not match the reporter citation that Drafting Assistant has validated. The validated reporter citation will display the Westlaw flag associated with that citation, if any. The red M flag will appear immediately in front of the potentially incorrect title. Additional revisions may be needed to ensure that the title cited is correct or if the reporter citation has been entered incorrectly.

## 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.

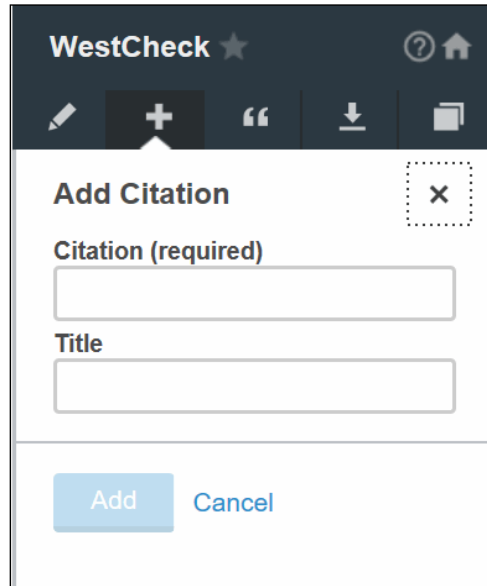
## Creating a Citations List

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**.

### ADDING CITATIONS TO THE CITATIONS LIST

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

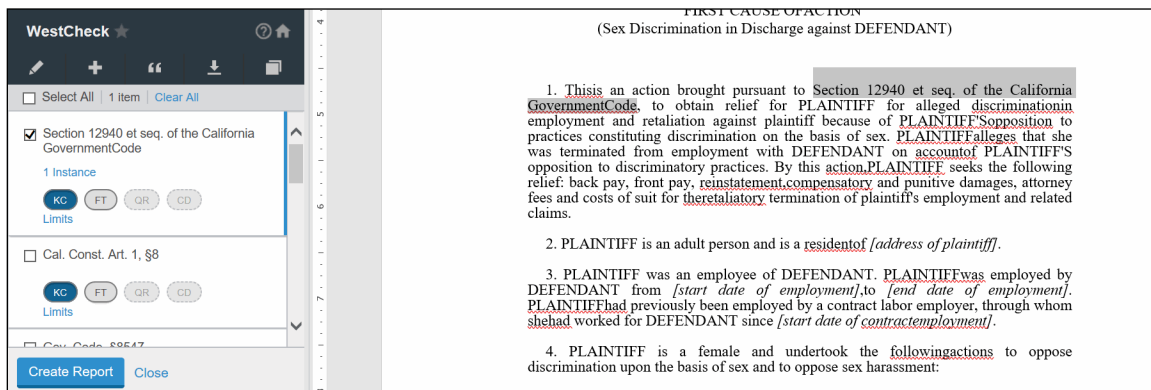
1. Click the **Add Citation** button (+) at the top of the citations list.
2. In the **Citation** box, type the citation.
3. In the **Title** box, type a title for the citation.
4. Click **Add**.



### 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.



Section 12940 et seq. of the California GovernmentCode

1 Instance

KC FT QR CD Limits

Cal. Const. Art. 1, §8

KC FT QR CD Limits

Cal. Const. Art. 1, §8

Create Report Close

FIRST CAUSE OF ACTION  
(Sex Discrimination in Discharge against DEFENDANT)

1. This is an action brought pursuant to Section 12940 et seq. of the California GovernmentCode, to obtain relief for PLAINTIFF for alleged discrimination in employment and retaliation against plaintiff because of PLAINTIFF'S opposition to practices constituting discrimination on the basis of sex. PLAINTIFF alleges that she was terminated from employment with DEFENDANT on account of PLAINTIFF'S opposition to discriminatory practices. By this action, PLAINTIFF seeks the following relief: back pay, front pay, reinstatement, compensatory and punitive damages, attorney fees and costs of suit for the retaliatory termination of plaintiff's employment and related claims.

2. PLAINTIFF is an adult person and is a resident of [address of plaintiff].

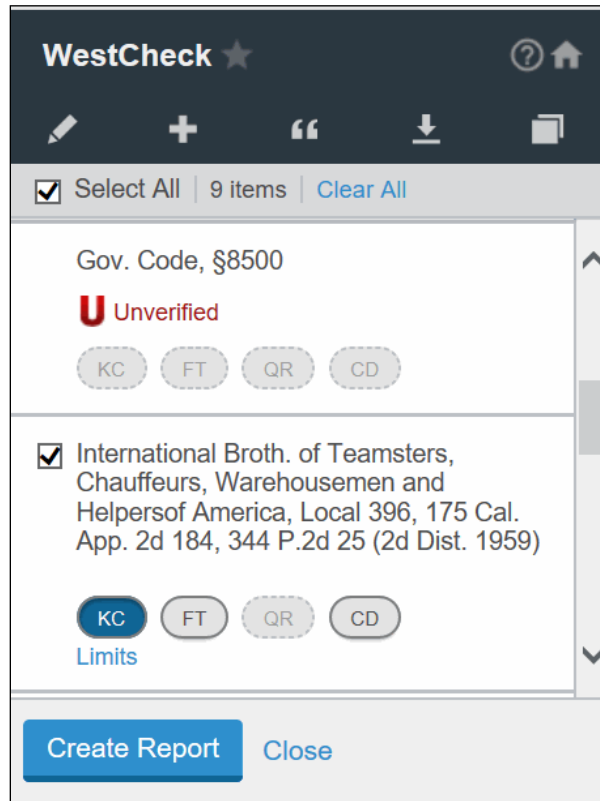
3. PLAINTIFF was an employee of DEFENDANT. PLAINTIFF was employed by DEFENDANT from [start date of employment] to [end date of employment]. PLAINTIFF had previously been employed by a contract labor employer, through whom she had worked for DEFENDANT since [start date of contract employment].

4. PLAINTIFF is a female and undertook the following actions to oppose discrimination upon the basis of sex and to oppose sex harassment:

#### Locating Inaccurate Citations

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

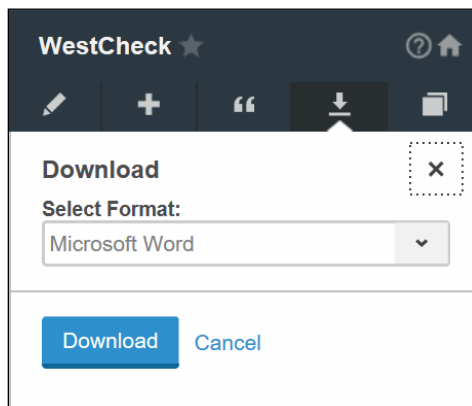
Citations that are not available with your subscription display with a red symbol displayed next to them.



### DOWNLOADING, PRINTING, AND SENDING CITATIONS

Download, print, and send the entire citations list or individual citations in the list. This option is not available in the Drafting Assistant Office Add-in application. For instruction using the Office add-in, see "Downloading, Printing, and Sending Citations with the Office add-in" on page 30.

1. Click the check box next to the citations you want to download. If you want to download all of the citations, click the **Select All** check box.
2. Click the **Download** button (📄) at the top of the citations list.
3. Select a format from the list, then click **Download**.

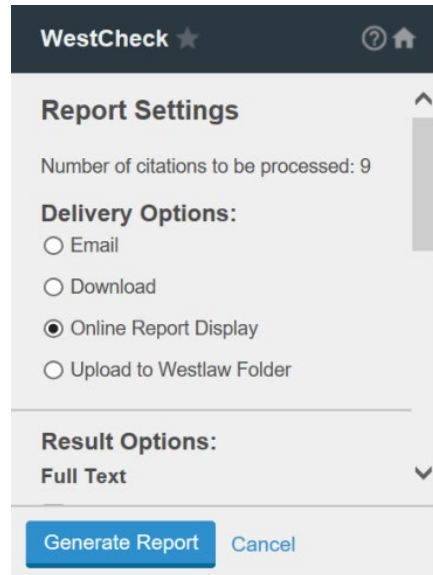


Once downloaded, you can open and print the downloaded citations and you can send them to others via email.

## 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 32 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 star icon and a home icon. Below that is the "Report Settings" section, which includes "Number of citations to be processed: 9". Under "Delivery Options:", there are four radio buttons: "Email", "Download", "Online Report Display" (which is selected), and "Upload to Westlaw Folder". Below that is the "Result Options:" section, which has a dropdown menu currently set to "Full Text". At the bottom, there are two buttons: "Generate Report" and "Cancel".

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

## GROUPING CITATIONS

1. Click the **Group By** button at the top of the citations list to group citations by Verified, Unverified & Non-Unique citations. You can also click the **Group By** button and select **Restore Default View** to return to the default view.

## Verifying Quotations with QuoteRight

Use QuoteRight to verify the accuracy of statutory or case law 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 23.

1. Click the **Attach Quotes** button located at the top of the WestCheck citations list.
2. Select a quote from the list of quotes.

- Detach a quotation from a citation by dragging the quotation to the **Unattached Quotes** area at the bottom of the quotes list.
- 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.
- Optionally, select a quotation and click the Move Up (↑) or Move Down (↓) button to move it up or down in the list.

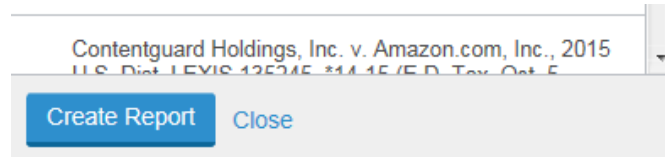
To quickly locate a quotation in your document, select it from the quotes list in the left pane. The document view will scroll to the location of the quote and the quote will be highlighted in your document.

The screenshot displays the WestCheck interface. On the left, a sidebar titled "WestCheck: Attach Quotes" contains a list of citations and a selected quote. The citations include "Ralee Engineering Co., 19 Cal. 4th 66, 78 Cal. Rptr. 2d 16, 960 P.2d 1046(1998)", "Gov. Code, §8547.10", "Gov. Code, §8547.2, subd. (b)", and "Code Civ. Proc., §§998, 1021.1, and 1021.5". The selected quote is: "Any person who intentionally engages in acts of reprisal, retaliation, threats, coercion, or...". At the bottom of the sidebar are "Done Reordering" and "Cancel" buttons.

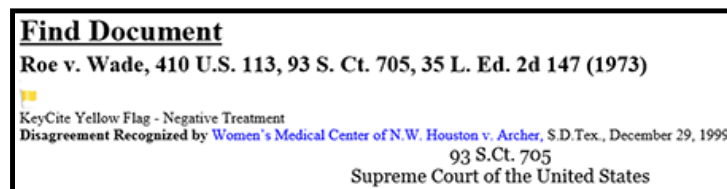
The main document view on the right shows a legal document with several paragraphs of text. Paragraph 19 discusses the plaintiff's disclosures and the defendant's retaliation. Paragraph 20 discusses the plaintiff's termination and the defendant's liability. Paragraph 21 discusses the plaintiff's emotional vulnerability. Paragraph 22 discusses the defendant's retaliation against the plaintiff. Paragraph 23 discusses the defendant's malicious, fraudulent, and oppressive acts.

## Working with Reports in WestCheck

1. Once you have checked your citations in WestCheck (see "Checking Citations" on page 25 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.
    - The **Download** option allows you to choose to download the report in Word, PDF, or RTF format. This option is not available in the Drafting Assistant Office Add-in application.
    - The **Online Report Display** option allows you to view the report in your browser and includes links to the full-text documents on Westlaw, links to the KeyCite history and citing references, and a navigational index. This option is not available in the Drafting Assistant Office Add-in application.
    - The **Upload to Westlaw Folder** option allows Drafting Assistant subscribers to deliver the report and any Full Text documents (Find results) to a selected Westlaw folder. Once you have selected this option, a Select Folder link will appear that allows you to choose a Westlaw folder. Any Full Text documents (Find results) will appear as links in the chosen Westlaw folder.
  - **Result Options**:
    - Select **Deliver Full Text results separately from the report** and select Word, PDF, or RTF format to deliver all Full Text requests in a separate document in that format. If you select this option, you may also want to select **Create one file for all Full Text Results** to deliver the Full Text 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 Full Text Results for Cases** to display KeyCite flags and information in the Full Text Results (see below for example).



- **Citation Options**:
  - If you have access to Cite Formatting through a Drafting Assistant subscription, you have an additional option to view your citations within the WestCheck report in a particular rule format. This option is not available in the Drafting Assistant Office Add-in application.
  - Select the **Rules for Citation** you prefer from the list. This option is not available in the Drafting Assistant Office Add-in application.

- By default, the rule format is Westlaw which provides all of the citation details that may not be included in the citation formatting rules. For example, Westlaw format includes all possible parallel citations, the specific date of a case decision, and the docket number for the case. This option is not available in the Drafting Assistant Office Add-in application.

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 26 for more information) and depth-of-treatment indicators (see "About Depth of Treatment Categories" on page 27 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 23 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 28 for more information).

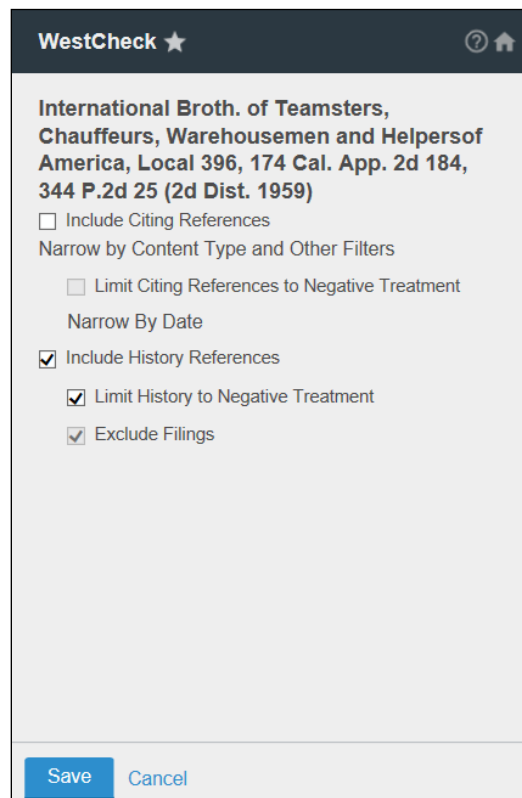


## KEYCITE LIMITS

Limits for Date, Content Type, Depth of Treatment and other filters are only applied to positive Citing References included in your WestCheck report. Negative Treatment can be limited by date.

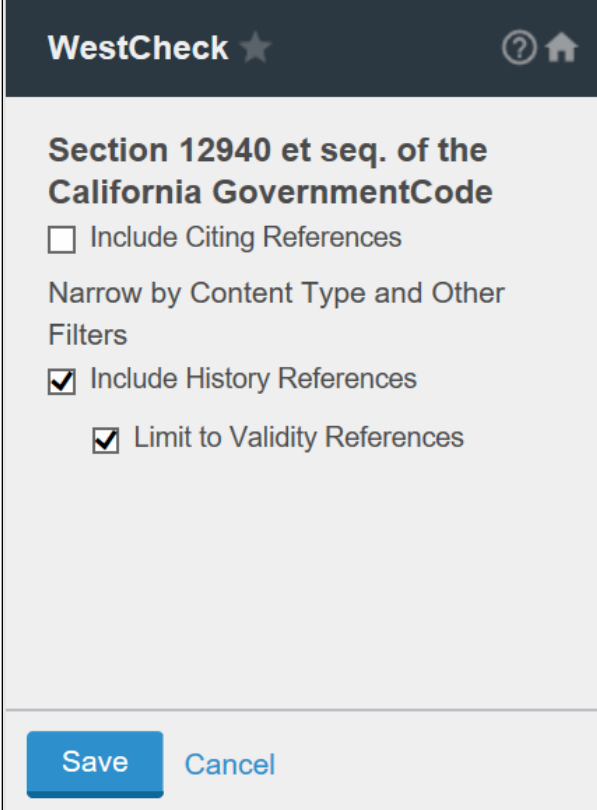
### Cases:

- Select **Include Citing References** to retrieve citing references for cases.
  - 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 27), **Jurisdictions**, **Reported Status**, and **Date Range**.
  - If you select **Include Citing References**, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the case. **Narrow by Content Type and Other Filters** will not apply to Negative Treatment. If you select **Limit Citing References to Negative Treatment**, you may limit by 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 27), **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.



The screenshot shows a mobile application interface for WestCheck. At the top, there is a dark header with the text "WestCheck" and a star icon, followed by a question mark and a home icon. Below the header, the main content area is light gray and contains the following text: "Section 12940 et seq. of the California GovernmentCode". Underneath this, there are three filter options, each with a checkbox: "Include Citing References" (unchecked), "Include History References" (checked), and "Limit to Validity References" (checked). Below these options is a link that says "Narrow by Content Type and Other Filters". At the bottom of the screen, there are two buttons: a blue "Save" button and a "Cancel" button.

#### 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 27), **Jurisdictions, Reported Status, and Date Range**.

#### Patents:

- Select **Include Citing References** to retrieve citing references for patents.
  - 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 27), **Jurisdictions, Reported Status, and Date Range**.
  - If you select **Include Citing References**, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the patent. **Narrow by Content Type and Other Filters** will not apply to Negative Treatment.

- 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.

# About TOA Builder

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Use the TOA Builder tool to build a properly formatted list of references (known as a Table of Authorities or TOA) in your legal document. The TOA is inserted where your cursor is positioned in the document at the time you run the tool and includes section headings for all content categories that are enabled when the profile settings are configured (see "Working with Profiles in TOA Builder" on page 37 for more information). It is considered best practice to use the TOA Builder tool in tandem with the Cite Formatting tool. Using both of these tools ensures that only valid citations are included in the table of authorities, and that those included are formatted correctly.

TOA Builder is integrated into Microsoft Word.

## Working with Profiles in TOA Builder

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 TOA Builder tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

### CREATING NEW TOA BUILDER PROFILES

1. Click **TOA Builder**.
2. Click **Create New**.

The screenshot shows the TOA Builder dialog box. At the top, it says "TOA Builder" with a star icon and a help icon. Below that, there is a "Select Profile" section with a dropdown menu currently showing "default" and buttons for "View" and "Create New". Underneath the dropdown is "Jurisdiction: None". The next section is "Cite Identification Range" with two radio button options: "Search entire document for cite identification" (which is selected) and "Mark beginning and end range for cite identification". At the bottom of the dialog are two buttons: "Run TOA Builder" and "Cancel".

3. Type a name for the new profile in the **Profile Name** box (e.g., Combined Federal and State).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include in your citations list.
6. Select the **Formatting** preferences you wish to apply to the headings in the TOA. Options include font type, size, and style (**Bold**, *Italic*, Underline).
  - You can also select the check box to **Add Page(s) label above page numbers**.

- Select **Link page numbers to pages in body of document** to add links within the TOA that link from the page numbers to the location in the document.
7. Select an option to work with **Citations in TOA**:
    - **Match font and font size from citation in the document.**
    - **Apply Special Formatting.** If you select this option, you can choose a font type and size to apply to the citations.
  8. Select an **Underline and Italicize** option for the citations in the TOA:
    - **Use underlining and italics that are applied to the cites in the text of the document.**
    - **Apply Special Formatting.** If you select this option, you can choose to **Underline Title, Italicize Title**, or both.
  9. Select one or more of the following options:
    - **Case name on separate line:** List each case name on a separate line from reporting string.
    - **Include subsequent history from text:** Include history in citations in the table of authorities.
    - **Use Passim for Frequently Cited Sources:** Use passim rather than citing specific pages.
    - **Combine Federal and State categories:** Combine federal and state citations in each table of authorities category. For example, if this option is selected, federal and state citations are listed together under Cases. If this option is not selected, cases are listed under Federal Cases and State Cases separately.
    - **Display comma delimiter after case title:** Add or remove the comma delimiter after case titles.
  10. Select a **Tab Leader** from the list provided (a tab leader is a row of dots or lines that connect the TOA text to the page number).
  11. Select a **TOA Spacing** option (Single or Double) from the list provided. This setting only applies to citations in the TOA. Headings are always double-spaced.
  12. Click **Save**.

The screenshot shows the 'TOA Builder' interface with the following settings:

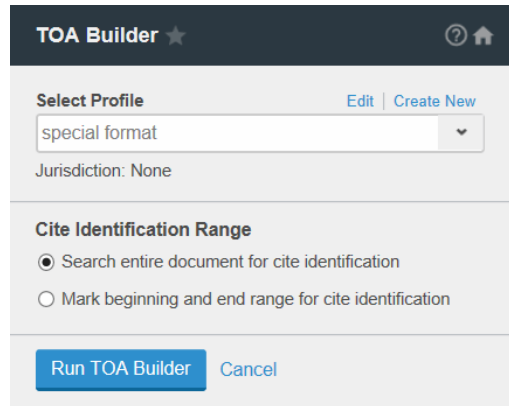
- Profile Name:** Profile
- Select Jurisdiction:** None
- Select Content Categories:**
  - Cases
  - Statutes
  - Regulations
  - Court Rules and Orders
  - Administrative Reports and Decisions
  - Secondary Sources
  - Other Authorities
- Formatting**
  - Headings in TOA:** Times New Roman

Buttons for 'Save' and 'Cancel' are visible at the bottom.

- Utilize the new saved profile in the TOA Builder tool by selecting it from the **Select Profile** list, then clicking **Run TOA Builder**. For detailed information on inserting a TOA into your document, see "Working with TOA Builder" on page 39.

#### VIEWING, EDITING, AND DELETING TOA BUILDER PROFILE SETTINGS

- Click **TOA Builder**.
- Select the Profile you want to view or edit from the **Select Profile** list.
- Click **Edit**. The default profile can be viewed but not edited.



The screenshot shows the TOA Builder interface. At the top, there is a header with "TOA Builder" and a star icon. Below the header, there is a "Select Profile" section with a dropdown menu currently showing "special format". To the right of the dropdown are "Edit" and "Create New" links. Below the dropdown, it says "Jurisdiction: None". The next section is "Cite Identification Range" with two radio button options: "Search entire document for cite identification" (which is selected) and "Mark beginning and end range for cite identification". At the bottom, there are two buttons: "Run TOA Builder" and "Cancel".

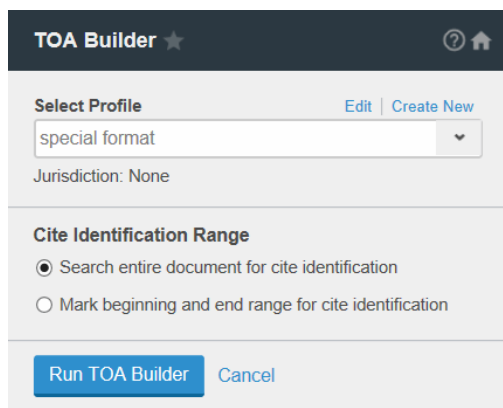
- Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

#### Working with TOA Builder

The Table of Authorities (TOA) Builder inserts a properly formatted list of references in your legal document.

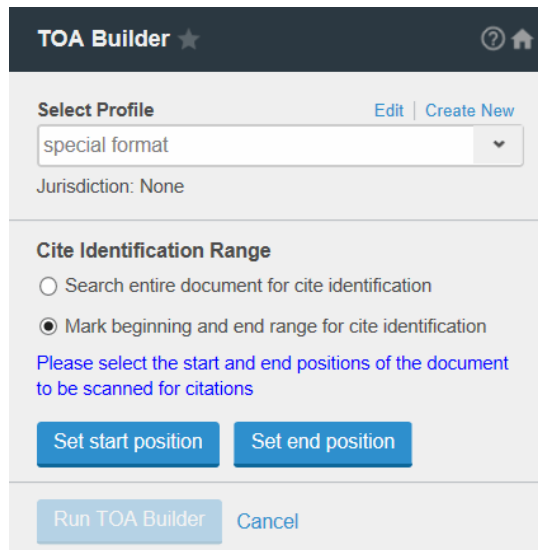
#### BUILDING A TABLE OF AUTHORITIES


- Click **TOA Builder**.
- 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 TOA Builder" on page 37 for more information.
- Under Cite Identification Range, select one of the following:
  - Search entire document for cite identification** to search the entire document for cite identification.

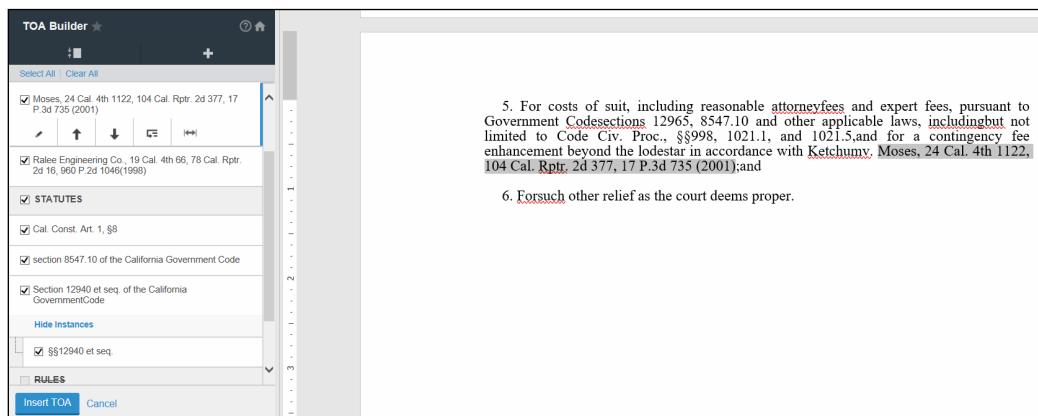



This screenshot is identical to the one above, showing the TOA Builder interface with the "Search entire document for cite identification" option selected under the "Cite Identification Range" section.

- Mark beginning and end range for cite identification** to restrict the search to only part of the document. Place the cursor in the document at the beginning of the desired range and click the **Set start position** button. Place the cursor at the end of the desired range and click the **Set end position** button. You can also change the range by clicking either the **Update start position** or **Update end position** buttons.



4. Click **Run TOA Builder**. All authorities found in the document will display in the left pane.
5. Optionally, click the **Hide/Show All Instances** button () to display or hide additional instances of citations.
6. 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.
7. Select individual check boxes, content category check boxes, or the **Select All** check box to select the citations you want to include in the TOA. All citations are selected by default.

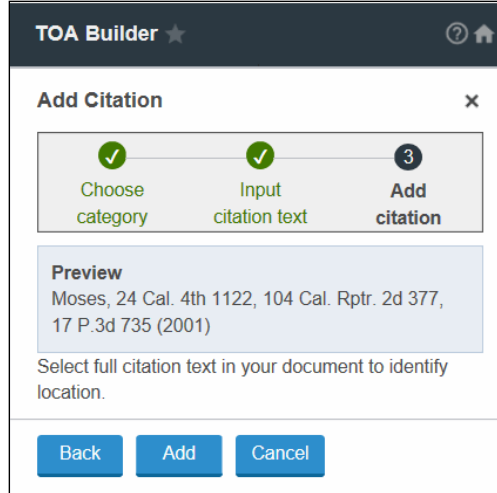


8. Click the **Plus** () button to manually add a citation. Then, complete the following:
  - **Choose category:** Select the citation category and jurisdiction for the citation. Click **Next**.

- **Input citation text:** Enter the **Title** and **Reporter String** in the appropriate fields. Confirm the citation is correct in the Preview window and then click **Next**.

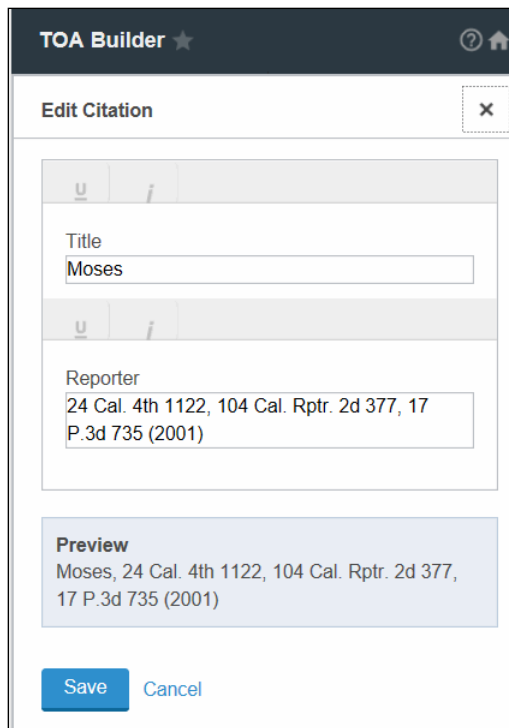
- **Add citation:** Highlight the full citation in the document and then click **Add**. The citation will be added to the list.  
**Note** You can also highlight the citation in your document before you click the **Plus** icon. Appropriate fields will be autopopulated based on your highlights and you can edit as appropriate.  
**Note** After you add a manual citation to the list, the list will re-alphabetize itself. If you plan to

relocate a citation out of alphabetical order, be sure to add all necessary manual citations before you manually move citations to the desired locations.

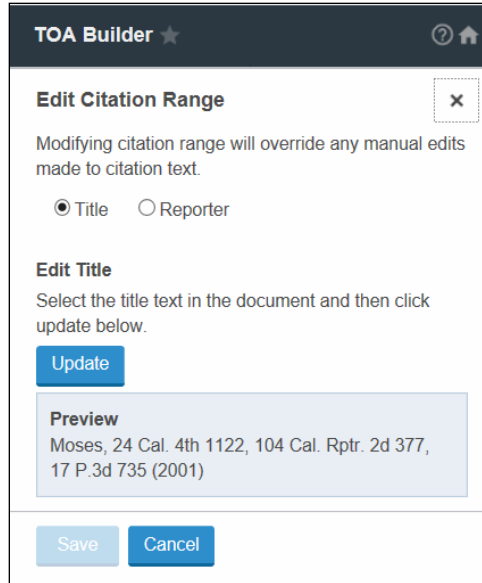


9. When selecting a citation in the list, you have the following options:

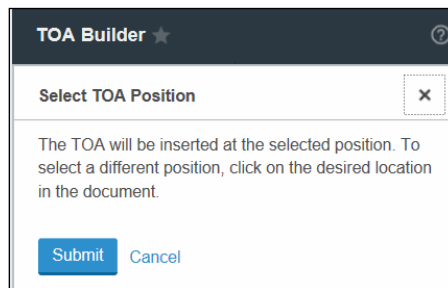
- Click the **Edit Text** (✎) button to edit the citation. Edit the title or reporter string as appropriate, confirm the citation is correct in the Preview, and click **Save**.



- Click the **Move Up** (↑) or **Move Down** (↓) button to move it up or down in the list. You can also drag and drop citations to any other part of the list.
- Click the **Make Primary** (⇧) button to change a secondary citation into a primary one in the list. Click the **Make Secondary** or **Make Instance** (⇩) button to change the citation to a secondary citation of the citation immediately above it in the list.
- Click the **Edit Range** (↔) button to change the range of the cite in the document. Select to change the **Title** or **Reporter** as appropriate, highlight the complete title or reporter string in the document, confirm its correctness in the Preview, click the **Update** button, and then click **Save**.

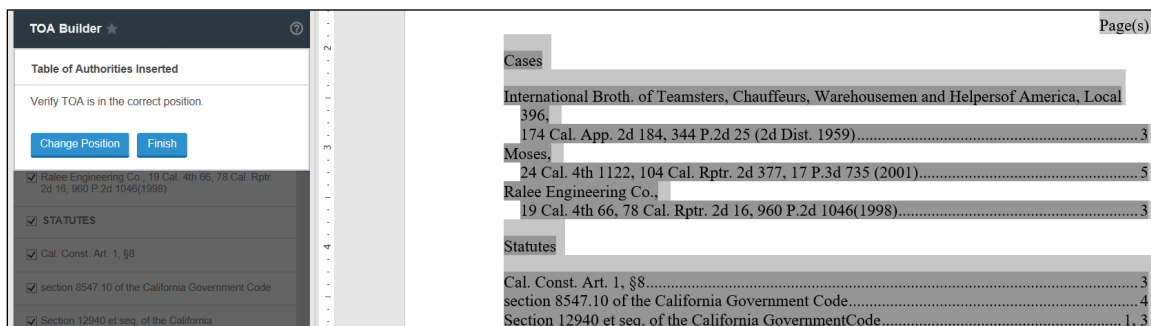


10. Click **Insert TOA**.
11. Click in the document to select a position in the document to insert your TOA, then click **Submit**.
12. Verify the TOA is in the correct position. Click **Change Position**, if needed. Click **Finish**.



13. A message verifying the TOA has been inserted displays. Click X to close.

The table of authorities is inserted in your document at the cursor location. The table of authorities includes the following headings, dependent on the selected Profile settings: Cases, Federal Cases, State Cases, Statutes, Federal Statutes, State Statutes, Rules, Federal Rules, State Rules, Regulations, Federal Regulations, State Regulations, and Other Authorities.

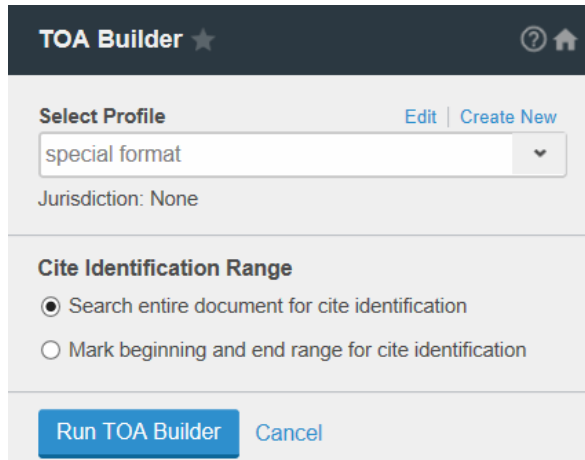


### EDITING CITATIONS AND ADDING ADDITIONAL CITATIONS AFTER THE TOA HAS BEEN CREATED

After you insert the Table or Authorities into your document, you can add additional citations or edit additional citations within both the text of the document and the Table of Authorities without undoing your previous work. Before you begin, add or edit any citations as appropriate.

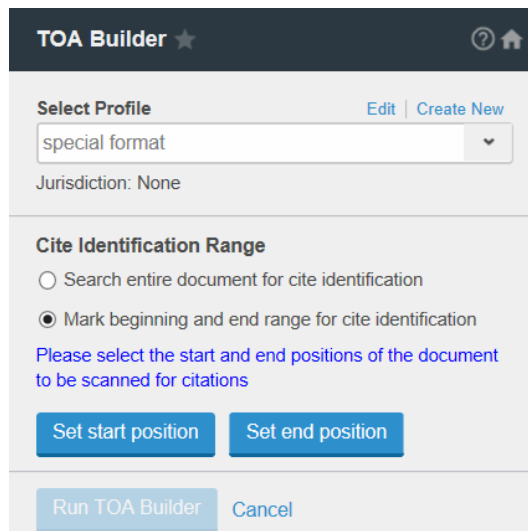
1. Click **TOA Builder**.

- Under Cite Identification Range, select one of the following:
  - Search entire document for cite identification** to search the entire document for cite identification.



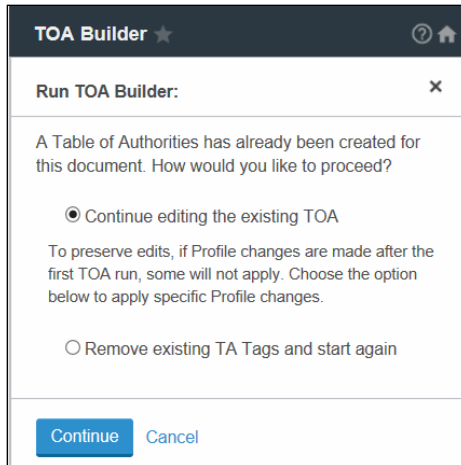
The screenshot shows the TOA Builder interface. At the top, it says 'TOA Builder' with a star icon and a home icon. Below that, there's a 'Select Profile' section with a dropdown menu showing 'special format' and buttons for 'Edit' and 'Create New'. Underneath, it says 'Jurisdiction: None'. The 'Cite Identification Range' section has two radio buttons: 'Search entire document for cite identification' (which is selected) and 'Mark beginning and end range for cite identification'. At the bottom, there are two buttons: 'Run TOA Builder' and 'Cancel'.

- Mark beginning and end range for cite identification** to restrict the search to only part of the document. Place the cursor in the document at the beginning of the desired range and click the **Set start position** button. Place the cursor at the end of the desired range and click the **Set end position** button. You can also change the range by clicking either the **Update start position** or **Update end position** buttons.



The screenshot shows the TOA Builder interface. At the top, it says 'TOA Builder' with a star icon and a home icon. Below that, there's a 'Select Profile' section with a dropdown menu showing 'special format' and buttons for 'Edit' and 'Create New'. Underneath, it says 'Jurisdiction: None'. The 'Cite Identification Range' section has two radio buttons: 'Search entire document for cite identification' and 'Mark beginning and end range for cite identification' (which is selected). Below the radio buttons, there's a blue text prompt: 'Please select the start and end positions of the document to be scanned for citations'. At the bottom of this section, there are two buttons: 'Set start position' and 'Set end position'. At the very bottom of the interface, there are two buttons: 'Run TOA Builder' and 'Cancel'.

- Click **Run TOA Builder**.
- Select one of the following:
  - Continue editing the existing TOA** to maintain all edits that have been previously made.
  - Remove existing TOA Tags and start again** to start from scratch with the Table of Authorities.
- Click **Continue**. The citation list will appear in the left pane.



6. If you selected to keep the previous TOA, new or edited citations will appear with a New icon next to them in the list. Drafting Assistant classifies new citations as:
  - Citations that you added to the text after the first TOA was completed.
  - Citations that were removed from the TOA the first time. If you deselected a citation previously, it will reappear in the list and be selected by default.
7. Manipulate the list of citations as described above as necessary and click **Insert TOA** to begin the process of inserting the TOA into your document once more.

**Note** After you run the TOA Builder again or insert a manual citation, the citation list will re-alphabetize itself. If you plan to relocate a citation out of alphabetical order, be sure to add all necessary manual citations before you manually move citations to the desired locations.

# About Flags & Links

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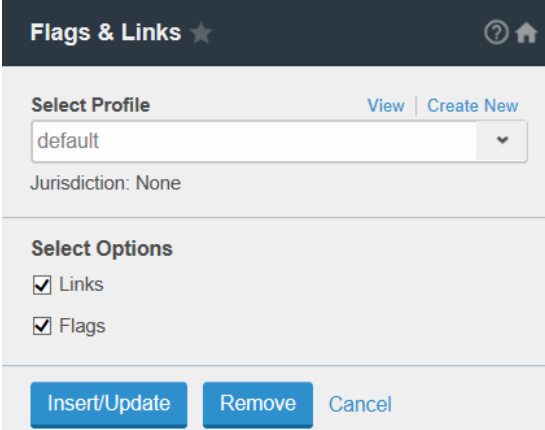
The Flags & Links tool allows you to view the status of cited cases, statutes, court rules, regulations, and administrative decisions in your document. Flags and links are applied to all standard long and short form citations, but you have the option to include *Ids*, *Supras*, *Ibids*, or to include 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.

### CREATING NEW FLAGS & LINKS PROFILES

1. Click **Flags & Links**.
2. Click **Create New**.



The screenshot shows the 'Flags & Links' tool interface. At the top, there is a dark header with the text 'Flags & Links' and a star icon. Below the header, there is a 'Select Profile' section with a dropdown menu currently showing 'default'. To the right of the dropdown are links for 'View' and 'Create New'. Below the dropdown, it says 'Jurisdiction: None'. The next section is 'Select Options', which has two checked checkboxes: 'Links' and 'Flags'. At the bottom, there are three buttons: 'Insert/Update', 'Remove', and 'Cancel'.

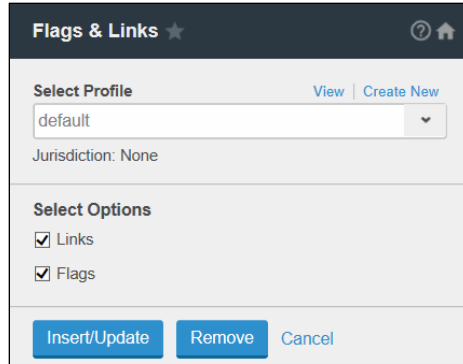
3. Type a name for the new profile in the **Profile Name** box (e.g., Secondary Source Flags).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include.
6. Select to **Include Ids, Supras, Ibids** if desired.
7. Select to **Include case titles only short 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**.

- 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 48.

### VIEWING, EDITING, AND DELETING FLAGS & LINKS PROFILE SETTINGS

To edit the settings for a Flags & Links profile:

- Click **Flags & Links**.
- Select the profile you want to view or edit from the **Select Profile** list.
- 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.

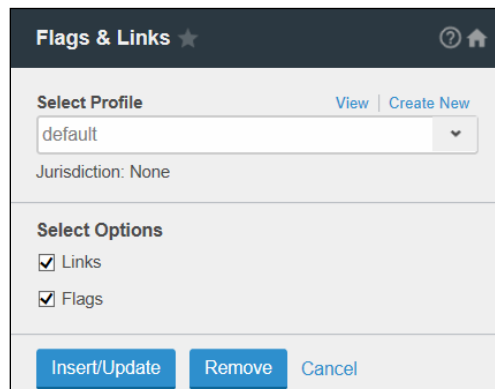
### Working with Flags and Links

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

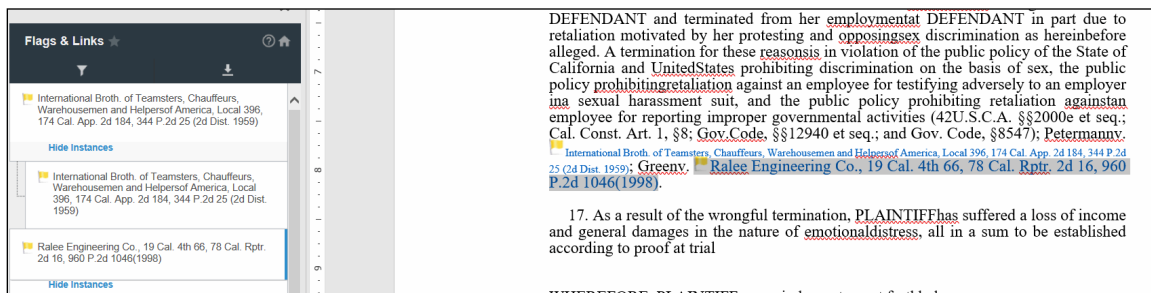
**Note** Some options may not be available in the Drafting Assistant Office Add-in application.

#### INSERTING AND UPDATING FLAGS AND LINKS

1. Click **Flags & 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. For more information, see "Working with Profiles in Flags and Links" on page 46.
2. Select to insert **Links**, **Flags**, or both, then click **Insert/Update**.

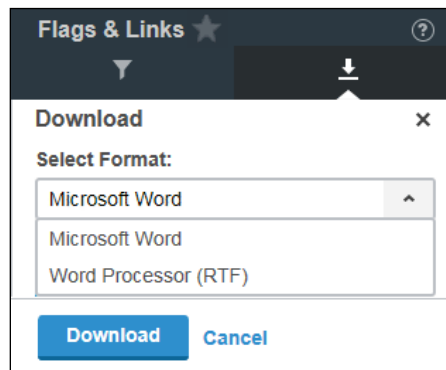


3. A list of KeyCite flags that have been added display. To quickly locate a citation in your document, select it from the list. The document view scrolls to the location of the citation and the citation is highlighted in your document. For more information, see "About KeyCite Status Flags" on page 26.



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**.

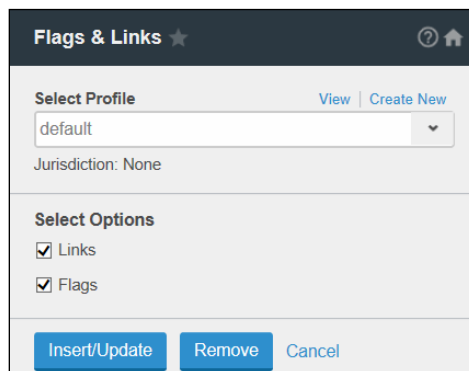
- **Download:** Download, print, and send the citations list. Click the **Download** button (📄) at the top of the citations list, select a format from the list provided, then click **Download**. Once downloaded, you can open and print the downloaded citations and you can send them to others via email.



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 **Flags & Links**.
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 46.
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.

### Red Striped Flag

A red striped flag indicates that a case is no longer good for at least one identified point of law.

### Overruling Risk Icon

In cases, an Overruling Risk icon warns that the case relies on another case or proposition from another case that has been explicitly overruled. For example, Case A is explicitly overruled or abrogated by Case B, but Case C, which cites case A for the same proposition that was overruled is not mentioned in Case B. Case C is implicitly overruled by Case B, and thus will display the Overruling Risk warning.

### 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.

### Red M

The red M indicates that the case title provided in the document does not match the reporter citation that Drafting Assistant has validated. The validated reporter citation will display the Westlaw flag associated with that citation, if any. The red M flag will appear immediately in front of the potentially incorrect title. Additional revisions may be needed to ensure that the title cited is correct or if the reporter citation has been entered incorrectly.

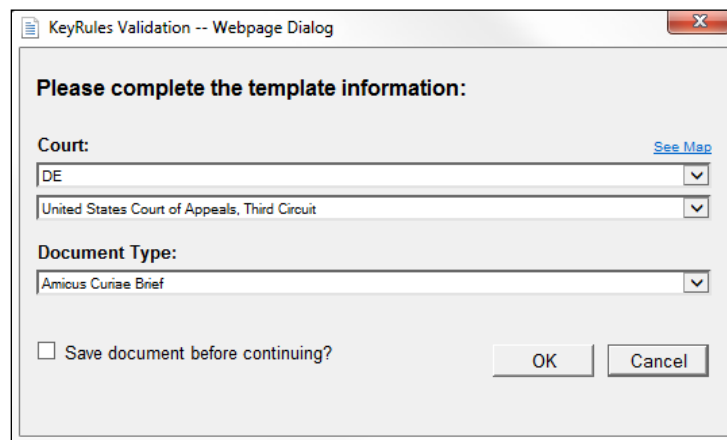
# About Validate Document Formatting

Once you finish drafting your document, you can use the Document Formatting tool to check whether the document is formatted in accordance with your jurisdiction's court rules. The Document Formatting tool is only available in Drafting Assistant Litigation. Drafting Assistant uses the following categories of rules to help you validate the document's format:

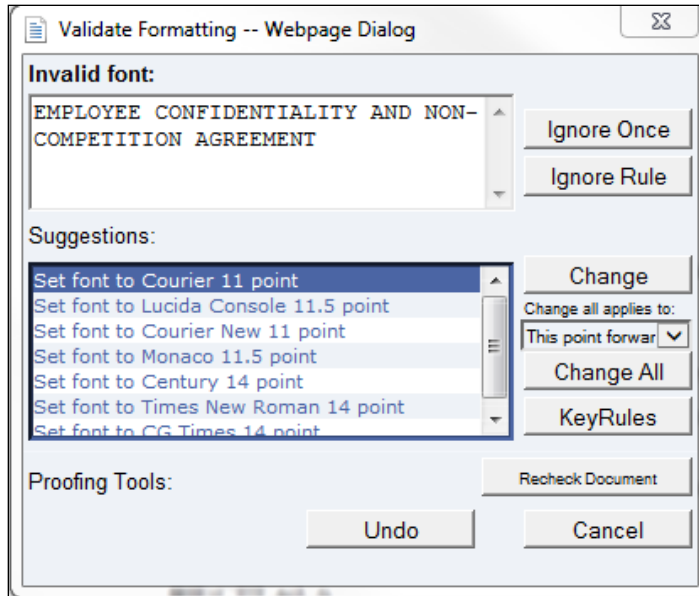
- **Correctable rules:** Relate specifically to your document and Drafting Assistant can correct them for you, for example, incorrect margins, fonts, and line spacing.
- **Detectable rules:** Relate specifically to your document but Drafting Assistant cannot correct them for you, for example, the document is over the page limit.
- **Informational rules:** Relate only to the type of document you are validating and provide additional information you may need prior to filing, for example, a blue cover is required.

Validate the format of a document by doing the following:

1. Click **Document Formatting**.
2. Select the appropriate court from the **Court** lists. Optionally, click **See Map** to view a map, and then click a state, click the appropriate court in the list, and click **OK**.
3. Select a document type from the **Document Type** list.
4. Select the **Save document before continuing** check box to save your original document as the Document Formatting tool will change that document.



5. Click **OK**. The first correctable rule, for example, Invalid font, is listed.
6. Do one of the following:
  - To ignore the first instance of the rule and move to the next instance of the rule, click **Ignore Once**.
  - To ignore all instances of the rule and move to the next rule, click **Ignore Rule**.
  - To change the first instance of the rule and move to the next instance of the rule, select an option under *Suggestions* and click **Change**.
  - To change all instances of the rule and move to the next rule, click **This point forward** in the **Change All Applies Change** list. Then, click an option under **Suggestions** and click **Change All**.
7. Repeat step 6 for each correctable rule.
8. To sign on to Westlaw and access KeyRules, click **KeyRules**.
9. To recheck the document, click **Recheck Document**.



- After you finish checking the formatting of the document, a list of detectable and informational rules displays, if available. To print the list of detectable and informational rules, click **Print**.



- Click the red X to close.

# About Authority Compiler

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Authority Compiler automatically creates a copy of your document, such as a brief, and appends to it all the important legal sources referenced in the document. The referenced documents are retrieved from Westlaw and a package (for example, Microsoft Word or PDF) is created containing your document and the cited legal sources. Hyperlinks are inserted into the document and jump to the appended authorities, without requiring the reader to access an online source.

You can use this self-contained copy of your document to file with the court, deliver to the court as a courtesy copy; or share with clients, co-counsel, and co-defendants.

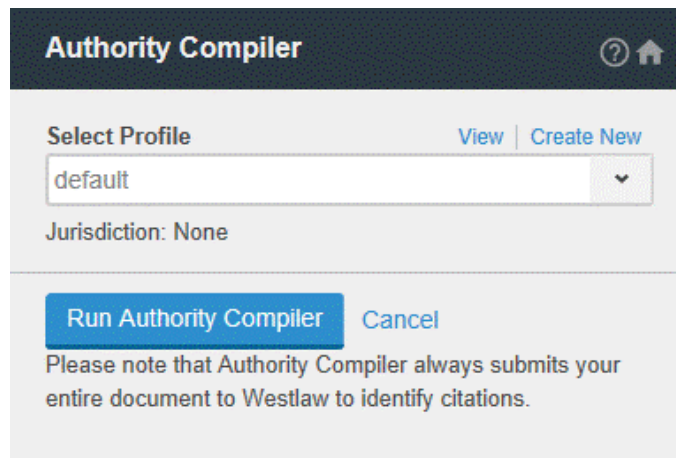
## Working with Profiles in Authority Compiler

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 Authority Compiler tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

Profiles in Authority Compiler save the options you want when you compile authority, such as jurisdictional settings, the scope of coverage, and other preferences for the appended authority.

### CREATING NEW AUTHORITY COMPILER PROFILES

1. Click the **Authority Compiler** tool on the left side of your document to launch Authority Compiler.
2. Click **Create New**.



3. Type a name for the new profile in the **Profile Name** box.
4. Select a **Jurisdiction** from the list to designate a jurisdiction to aid in identifying citations. Citations that are recognized are listed on the Select Authority window and can be appended as an authority. To remove a jurisdiction from the appended authorities, select a jurisdiction from the list and select **Don't append authorities from this jurisdiction**. Citations from this jurisdiction will not be selected on the Select Authority window.
5. Select the **Content Categories** to indicate the types of legal authority to include. Authorities within scope are listed and can be appended as an authority. Options include:
  - Cases
  - Statutes
  - Regulations
  - Court Rules and Orders
  - Administrative Reports and Decisions

- Secondary Sources
6. Select the **Append Authority Preferences**:
    - **Link Citations to appended authority**: Inserts hyperlinks for citation that go to the appended authorities. The links change color after processing according to Microsoft Word settings, but underlining, italics, and other styling is preserved
    - **Deselect Out of Plan authorities**: If the citations in your document are not covered in your Westlaw subscription, the corresponding legal documents are not marked for inclusion in the appended documents. Out-of-plan authorities are labeled. If you opt to include these citations as authorities, additional charges may apply.
    - **Include separator pages**: Inserts a separator page between appended documents.
    - **Insert a Table of Contents**: Inserts a table of contents for appended documents that appear after your document and before the appended documents. The document names are hyperlinks that go to the first page of the appended legal document.
    - **Use the annotated version of a statute when available**: The annotated version of a statute appears in the appended documents, if available.
    - Dual column layout for Cases: The appended cases will have the dual-column layout.
  7. If you want appended documents to include page numbers, select **Add Page Numbers**. Then select to **Number separately from drafted document** or **Continue numbering from drafted document**.
  8. Click **Save**. Utilize the new saved profile in the Authority Compiler tool by selecting it from the **Select Profile** list, and then click **Run Authority Compiler**.

The screenshot shows the 'Authority Compiler' application window. It features a dark header with the title 'Authority Compiler' and a star icon. Below the header, there are several sections for configuration:

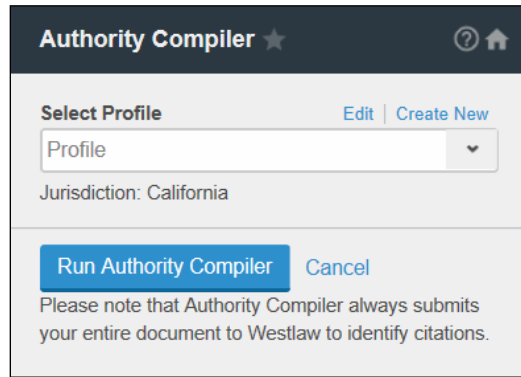
- Profile Name:** A text input field containing 'Authority Compiler Profile'.
- Select Jurisdiction:** A dropdown menu currently set to 'California'. Below it is a checkbox labeled 'Do not Append authorities from this jurisdiction' which is unchecked.
- Select Content Categories:** A list of checkboxes:
  - Cases
  - Statutes
  - Regulations
  - Court Rules and Orders
  - Administrative Reports and Decisions
  - Secondary Sources
- Append Authority Preferences:** A list of checkboxes:
  - Links citations to append authority
  - Deselect Out of Plan authorities
  - Include separator pages
  - Insert a Table of Contents
  - Include case headnotes
  - Use the annotated version of a statute when available
  - Dual column layout for Cases
- Page Numbering Preferences:** A list of checkboxes and radio buttons:
  - Add Page Numbers
    - Number separately from drafted document
    - Continue numbering from drafted document

At the bottom of the window, there are two buttons: 'Save' (highlighted in blue) and 'Cancel'.

## EDITING, AND DELETING AUTHORITY COMPILER PROFILE SETTINGS

To edit the settings for an Authority Compiler profile:

1. Click the **Authority Compiler** tool on the left side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit** to edit the profile settings. The default profile cannot be edited.
4. Edit the settings as desired and click **Save**.



The screenshot shows a dark-themed panel titled "Authority Compiler" with a star icon and a home icon. Below the title is a "Select Profile" section with "Edit" and "Create New" links. A dropdown menu is open, showing "Profile" with a downward arrow. Below the dropdown, it says "Jurisdiction: California". At the bottom, there are two buttons: "Run Authority Compiler" (highlighted in blue) and "Cancel". Below the buttons is a note: "Please note that Authority Compiler always submits your entire document to Westlaw to identify citations."

To delete an Authority Compiler profile:

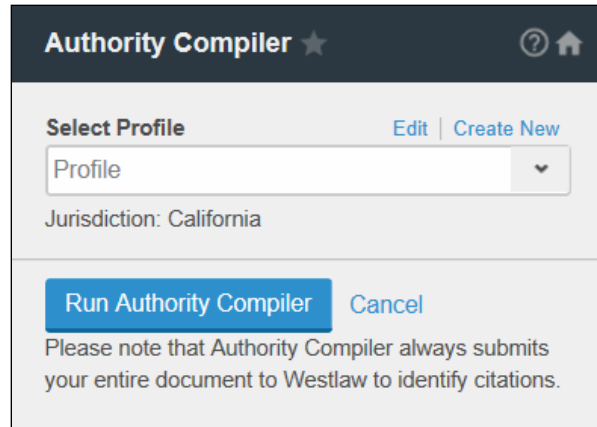
1. Click the **Authority Compiler** tool on the left side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list, and click **Edit**.
3. Click **Delete Profile**, and click **Continue** to verify.

## Working with Authority Compiler

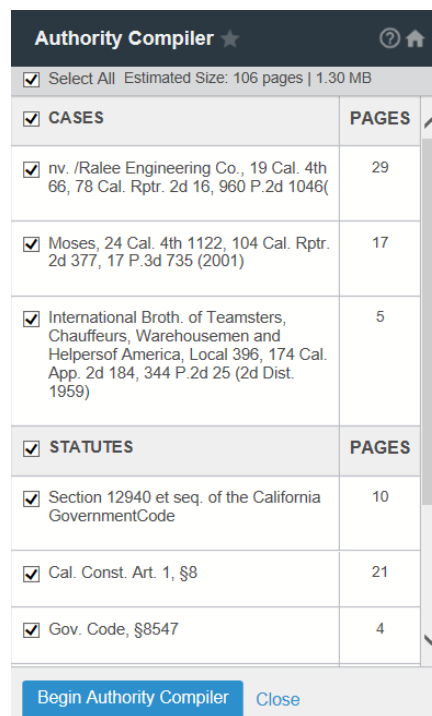
Authority Compiler automatically creates a copy of your document, such as a brief, and appends to it all the important legal sources referenced in the document. The referenced documents are retrieved from Westlaw and a package (e.g., Microsoft Word or PDF) is created containing your document and the cited legal sources. Hyperlinks are inserted into the document and jump to the appended authorities, without requiring the reader to access an online source.

You can use this self-contained copy of your document to file with the court, deliver to the court as a courtesy copy, or share with clients, co-counsel, and co-defendants.

1. Click **Authority Compiler**.
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 Authority Compiler" on page 53..
3. Select the profile you want to use from the **Select Profile** list.
4. Click **Run Authority Compiler**.



5. Each citation displays in a list in the left pane. You may unselect or select the authorities you want to append to your document. You have the following options:
  - Select a section heading to include all authorities in a category (for example, Cases).
  - Select a document's check box to include an individual authority.
  - *NON UNIQUE* appears above non-unique citations and allows you to select one of the associated documents to include. Click the title of a document to view the document on Westlaw.
  - *Out of plan* appears next to citations that are not covered in your Westlaw subscription.



6. Click **Begin Authority Compiler**.
7. Select the delivery format that you want for your compiled authority from the **Export Settings** list (for example, Word Document, PDF). Click **Continue**.
8. Click **Download** and choose whether to save or open the compiled document with the appended authorities.

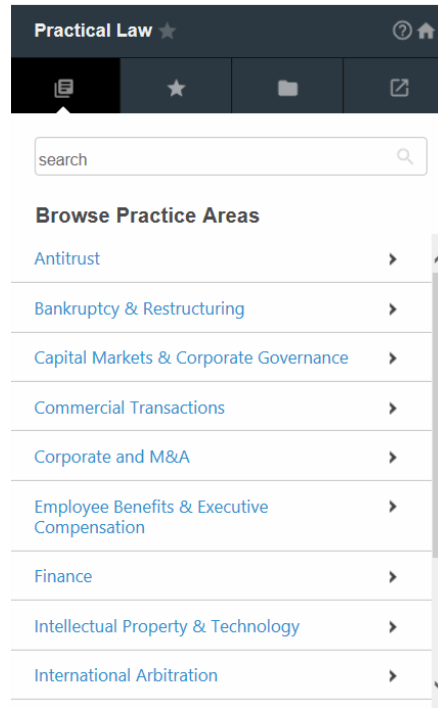
Billing occurs when the compiled document is downloaded. Charges may be incurred for appended authorities that are not covered in your Westlaw subscription.

In the compiled document, hyperlinked citations in the table of authorities go to the appended authority. Hyperlinked citations in the appended authorities go to the full text of the document on Westlaw.

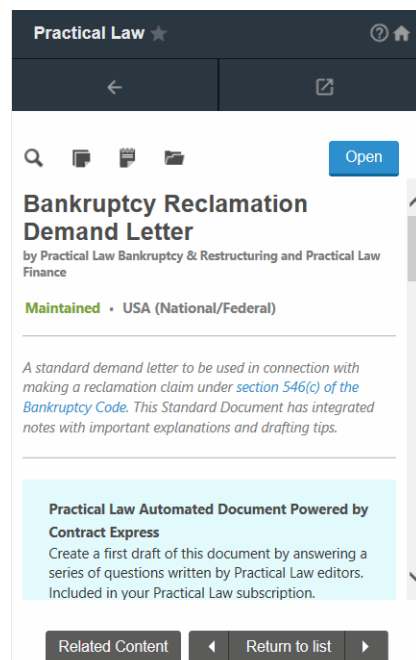
# About Practical Law

Use Practical Law to make sure your document reflects current legal and market standards. Practical Law's Standard Documents and Clauses integrates into Drafting Assistant–Transactional seamlessly to provide clause-by-clause drafting guidance.

1. Click **Practical Law**.



2. Type your search terms in the box and click the magnifying glass to search.
3. Click a practice area to browse Practical Law documents, if desired.
4. You can copy and paste text directly into your draft document while viewing a Practical Law document.
5. Click **Open** to open the Practical Law document in your word processor, if desired.



# About Build Document

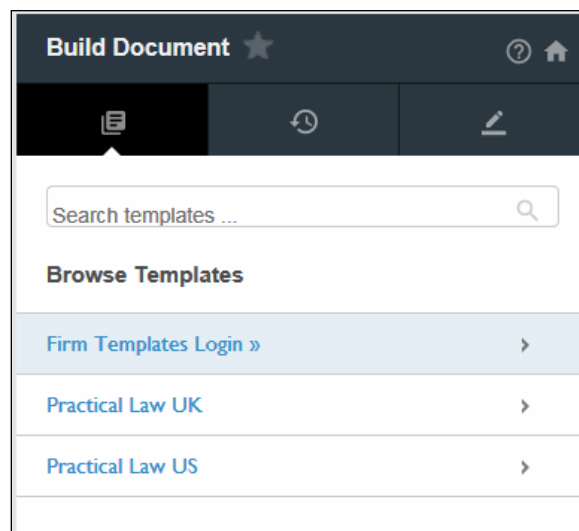
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The Build Document tool allows you to build documents from templates that have been created by users in your organization using Thomson Reuters Contract Express or those created by Practical Law. After a document or collection of documents are created using an online questionnaire, all Drafting Assistant tools and features are available to use within the document.

To access templates created by your organization, a subscription to Contract Express is needed. Practical Law Automated Documents are available to all Practical Law subscribers.

The Build Document tool consists of three tabs:

- Use the **Browse** tab to search for or browse to templates created for your organization.
- Use the **Recents** tab to view templates that you have recently accessed.
- Use the **My Projects** to view the status of and access your recent projects.



Before you can begin using the Build Document tool, ensure that the link to your Contract Express subscription is configured (see "Configure Contract Express Integration" on page **Error! Bookmark not defined.** for more information). Additional steps may also be needed to set up access to Practical Law Automated Documents (see "Configure Access to Practical Law Automated Documents" on page **Error! Bookmark not defined.** for more information).

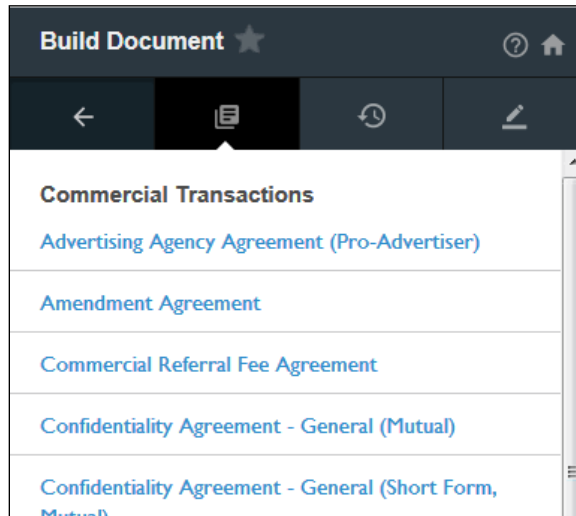
## Working with Build Document

Use the Build Document tool to assemble documents from templates. Once the document is built from the template, all Drafting Assistant tools and functions can be used with the document.

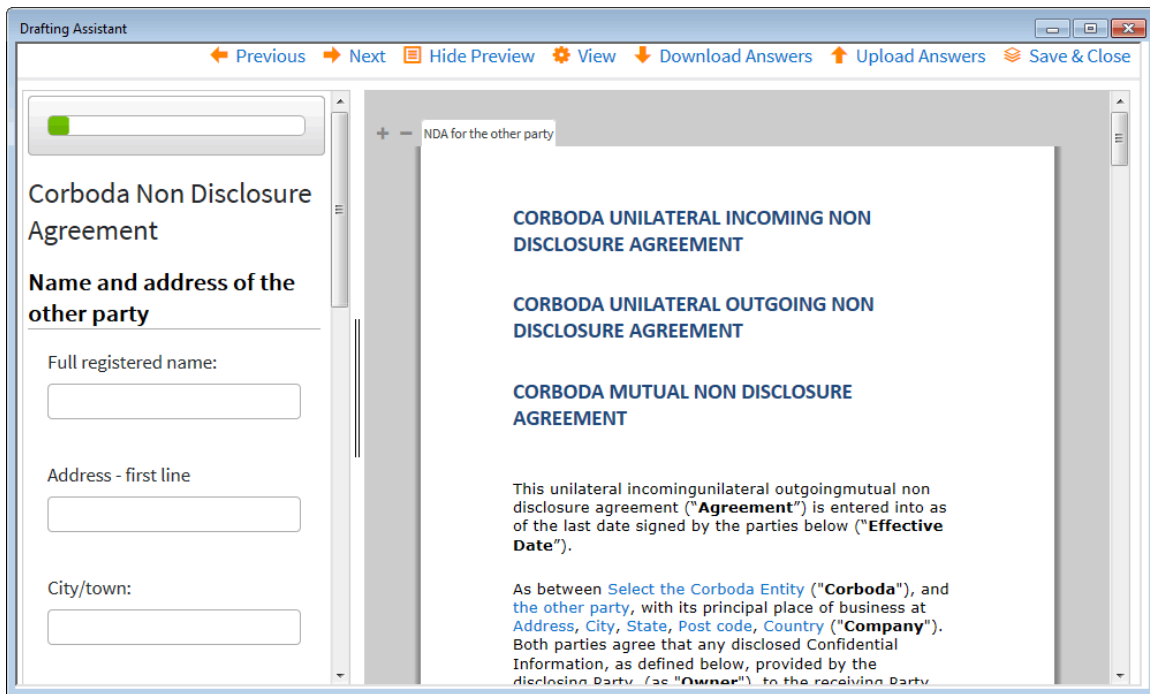
### CREATING A NEW DOCUMENT

To create a new document using the Build Document tool, complete the following:

1. Click **Build Document**.
2. Do one of the following:
  - On the Browse tab, enter a search term in the **Search templates...** field. When searching from this tag, results will be pulled from all sources to which you subscribe. From the results, click the template you want to build. A window may appear asking for your Contract Express credentials (email and password). Enter your credentials, and click **Log In**.
  - Click **Firm Templates** or **Practical Law** to access the list of templates from that source. From the list, click the template you want to build.



3. A separate window will open with a questionnaire. Enter all necessary information in the questionnaire, using the **Previous** and **Next** buttons to navigate. Click **Preview** to view the document in the questionnaire window as it is dynamically created.
  - You can also download entries using the **Download Answers** button or upload previously created entries using the **Upload Answers** button (Contract Express templates only).
  - At any time, click **Save & Close** to end the questionnaire. All answers will be saved, and it is possible to continue building the document at a later time. Additionally, an entry in the My Projects tab is created with an Incomplete status.



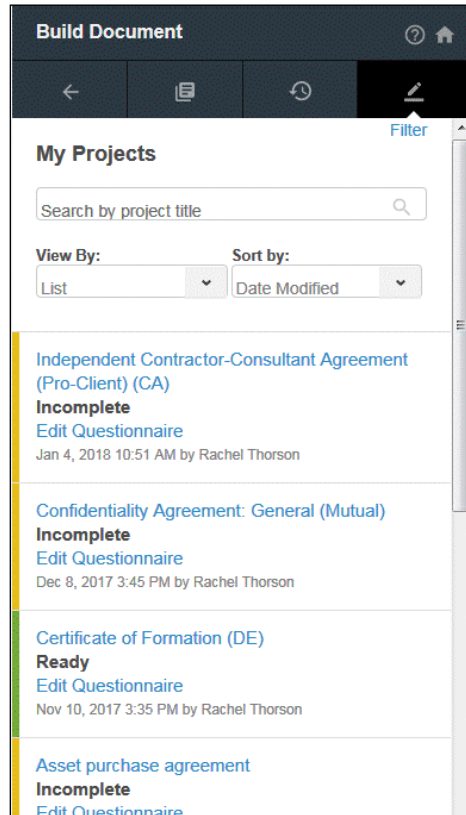
Once the questionnaire has been completed, a new instance of Microsoft Word opens with the completed document. Additionally, an entry in the My Projects tab is created with a Ready status.

All tools and features in Drafting Assistant can now be applied to this document.

## ACCESSING AN INCOMPLETE DOCUMENT

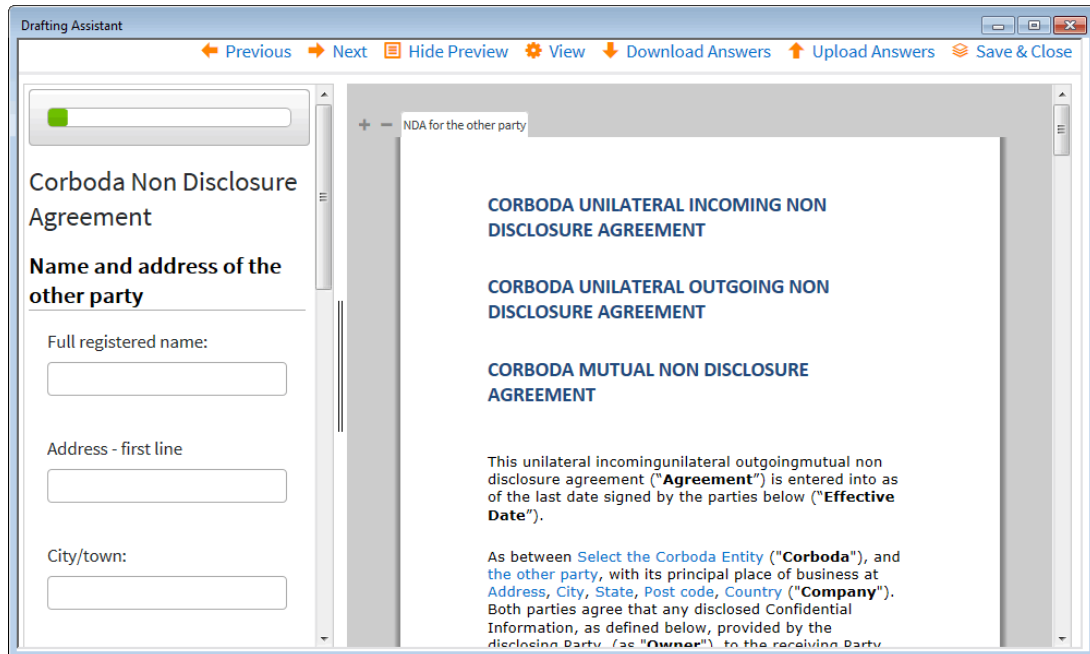
To complete an unfinished document that has been saved or has saved answers, complete the following:

1. Click **Build Document**.
2. On the My Projects tab, find and click the document you wish to complete. It will have a status of Incomplete. You can use **Search**, **Sort By**, or **Filter** to help you find a previous project. Click **Edit Questionnaire**, and the questionnaire will open in a new window with any previous answers populated.



3. Complete the questionnaire as necessary. Use the **Previous** and **Next** buttons to navigate. Click **Preview** to view the document in the questionnaire window as it is dynamically created.

4. Click **Save & Close**.



5. A new instance of Microsoft Word opens with the completed document. Additionally, the entry for this project in the My Projects tab will change from Incomplete to Ready.

All tools and features in Drafting Assistant can now be applied to this document.

### Configure Contract Express Integration

To access your organization's Contract Express templates from within Drafting Assistant, a link between the two applications must first be established. When configuring this link for the first time, any user in the organization can perform the configuration. Once the link has been established for one user, it is established for all users in the organization. If changes need to be made to the link after it has been established, only a user that has been designated as the Build Document Administrator can make those changes.

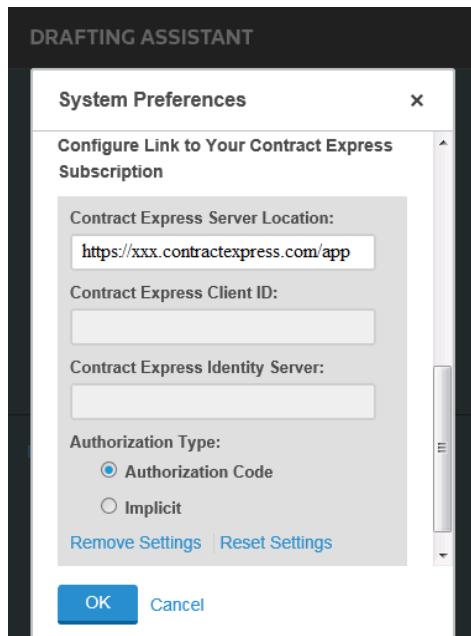
If your Contract Express server is hosted and maintained by Thomson Reuters, complete the steps under **Link Configuration for Hosted Contract Express**. If your Contract Express server is managed by your organization, complete the steps under **Link Configuration for On-Premise Contract Express**.

#### LINK CONFIGURATION FOR HOSTED CONTRACT EXPRESS

If your Contract Express server is hosted and maintained by Thomson Reuters, complete the following:

1. Click **System Preferences**.
2. Under Configure Link to Your Contract Express Subscription, enter the Contract Express Server Location in the **Contract Express Server Location** text box. The Server URL is same as the URL that you use to access Contract Express on your browser (e.g., <https://xxx.contractexpress.com/app>).

3. Click **OK**.



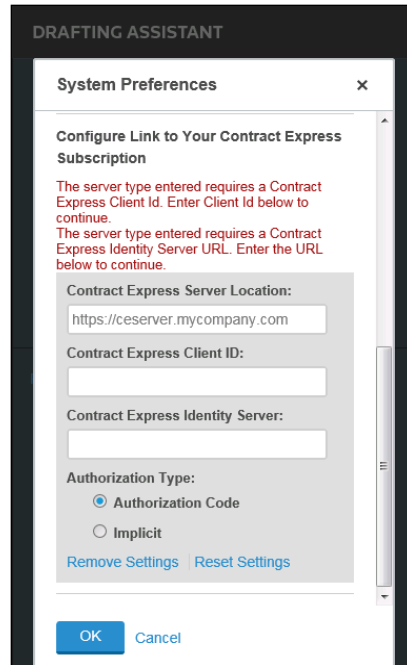
You are now ready to use Contract Express with Drafting Assistant. To access your templates, click **Build Document**.

#### **LINK CONFIGURATION FOR ON-PREMISE CONTRACT EXPRESS**

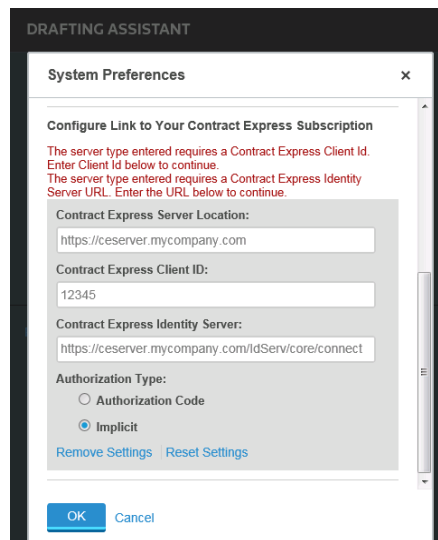
If your Contract Express server is managed by your organization, complete the following:

1. Before you begin, contact your Contract Express Administrator for the following information:
  - Contract Express Server URL
  - Contract Express Identity Server URL
  - Contract Express Client ID for Drafting Assistant
  - Authorization Type

**Note** If the Authorization Type includes an Authorization Code, ensure your administrator also provides this code.
2. Click **System Preferences**.
3. Under Configure Link to Your Contract Express Subscription, enter the Contract Express Server Location in the **Contract Express Server Location** text box. The Server URL is same as the URL that you use to access Contract Express on your browser (e.g., **https://ceserver.mycompany.com**).
4. Before entering the remaining information, click **OK** to validate the server path.



5. Enter your Contract Express Client ID for Drafting Assistant in the **Contract Express Client ID** field. If your Administrator provided you with an Authorization Code instead of a Client ID, enter that in the field instead.
6. Enter your Contract Express Identity Server URL in the **Contract Express Identity Server** field (e.g., <https://ceserver.mycompany.com/IdServ/core/connect>).
7. Select the **Authorization Type** that matches the authorization type your Contract Express servers uses.
8. Click **OK**.



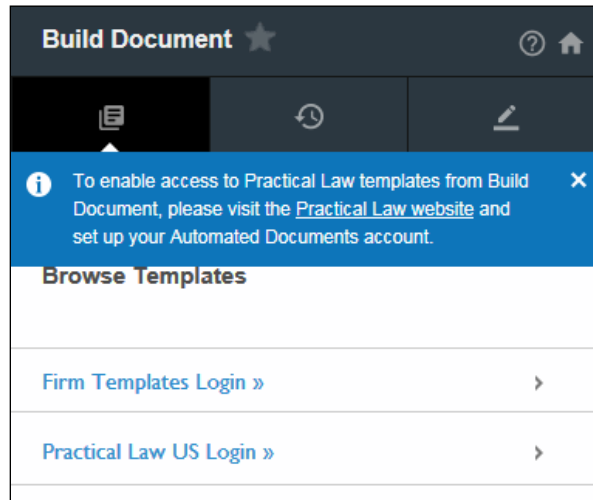
You are now ready to use Contract Express with Drafting Assistant. To access your templates, click **Build Document**.

### Configure Access to Practical Law Automated Documents

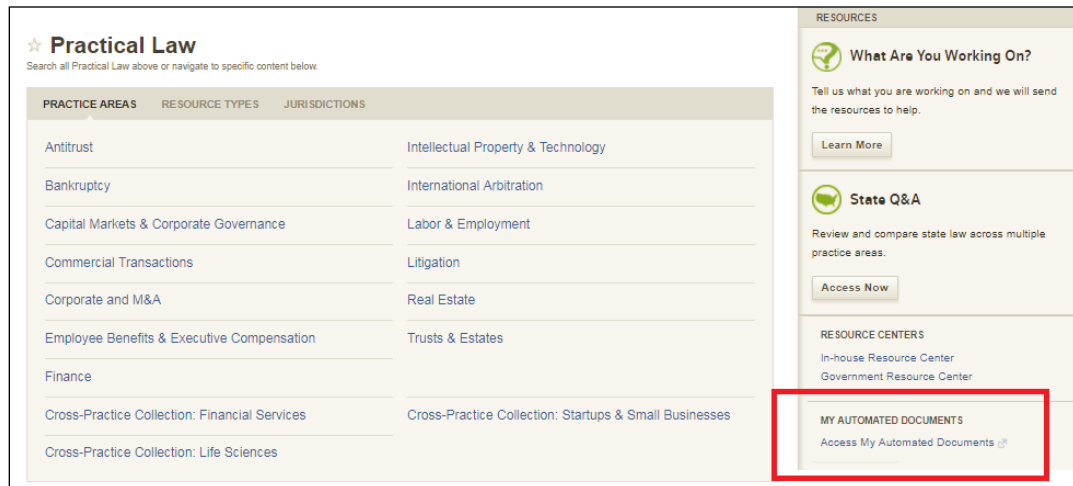
If your organization acquires a subscription to Practical Law that includes access to Automated Documents powered by Contract Express, the link to those Automated Documents must be configured for access in Drafting Assistant.

To configure the link to access Practical Law Automated Documents, complete the following:

1. Click **Build Document**.
2. In the left pane, a blue message banner is displayed, reminding you to set up access to Automated Document. Click the link in the banner, and you will be taken to the Practical Law website.



3. In the browser window, enter your credentials to log into Westlaw and Practical Law.
4. On the Practical Law home page, click the **Access My Automated Documents** link in the lower right pane.



Once the Contract Express website and its Welcome page loads, access to Practical Law Automated Documents has been configured and the templates will be available.

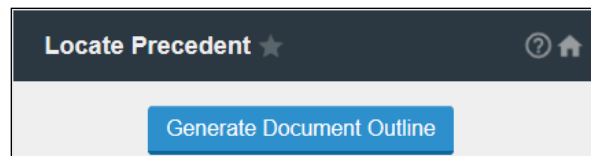
# About Locate Precedent

The Locate Precedent feature in Drafting Assistant allows you to retrieve sample agreements and clauses from those agreements related to specific contract clauses in your document. Locate Precedent analyzes your contract and creates an outline so you can locate sample agreements related to clauses in your contract.

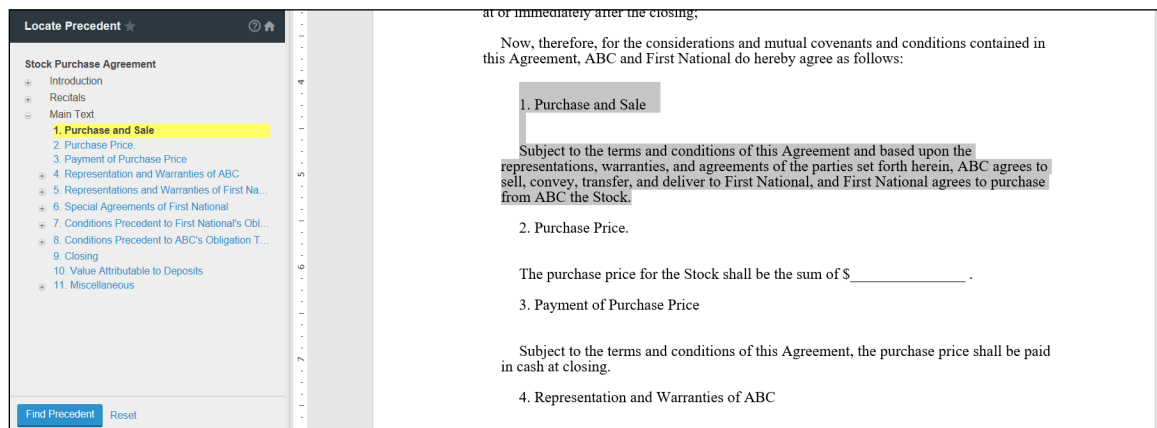
## Locate Precedent

To create an outline of your document and locate precedent related to specific clauses, complete the following:

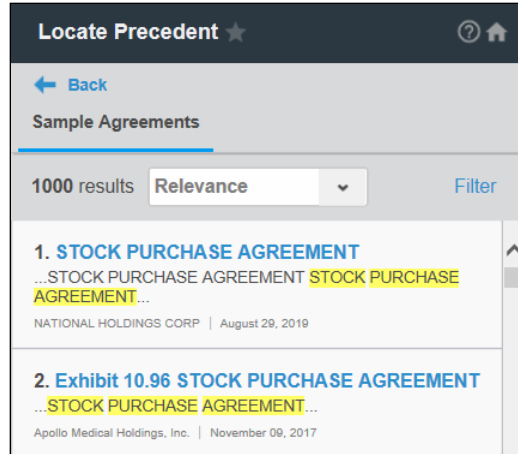
1. Click **Locate Precedent**.
2. Click **Generate Document Outline**.



3. Click a clause from the document outline on the left, and click **Find Precedent** to search for precedent related to that section of content. Click the **expand/collapse** buttons (**+**/**-**) to expand/collapse the outline. The section you select is highlighted in the document text on the right.



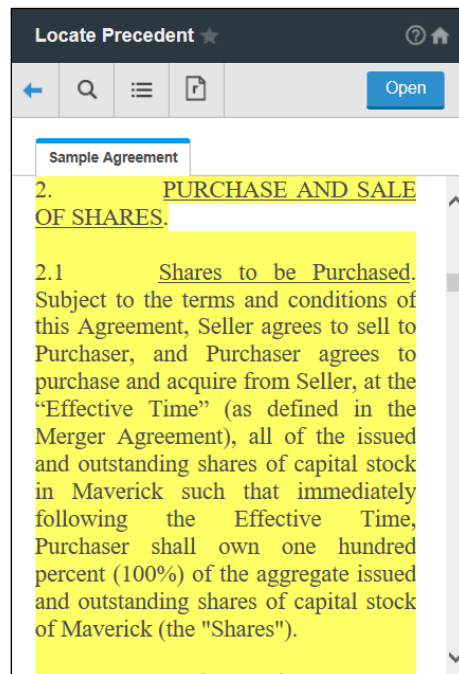
4. You have the following options:
  - Select **Relevance**, **Date**, or **Title (A-Z)** from the list at the top of the results to sort the list of results.
  - Click **Filter** at the top of the results list, select the desired filters, and click **Apply Filters**. Click **Clear All** to remove all filters.
  - Click **Back** to return to the document outline.



5. Click a **Sample Agreement** in the results list to open the document in the Locate Precedent pane. You have the following options:

- **Return to List** (←): Return to the full results list.
- **Open**: Open the document in another instance of Microsoft Word.
- **Search** (🔍): Type a search term in the box provided and press **Enter** to search within the sample agreement. At least two characters must be entered to begin a search. Use the arrows to the right of the search term to navigate from search hit to search hit in the document. Click the **X** to the right of the search term to remove the search.
- **Table of Contents** (☰): Return to the outline of the document.
- **Related Documents** (📄): See documents related to the selected sample agreement.

6. Use the document and Clauses navigation at the bottom of the document to navigate to the next sample agreement or next clause, respectively (



# About Deal Proof

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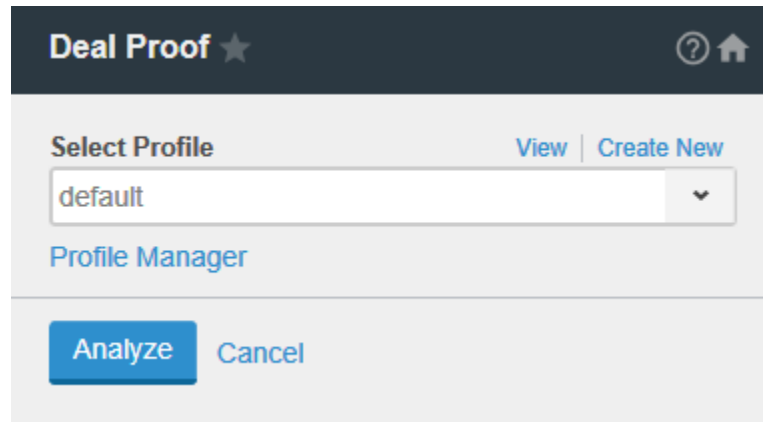
Use the Deal Proof tool to analyze and review document drafts. You can quickly generate or review a first draft, as well as find and address potential errors, omissions, and inconsistencies that may occur in the process of drafting, negotiating, and reviewing your agreement. Deal Proof flags your document for potential errors and discrepancies, and references made in your document. After thoroughly reviewing your document, you can generate reports for flags, references, and the outline of the findings and then remove all markings and hypertext links in the documents.

## Working with Profiles in Deal Proof

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 Deal Proof, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

### CREATING NEW DEAL PROOF PROFILES

1. Click **Deal Proof**.
2. Click **Create New**.



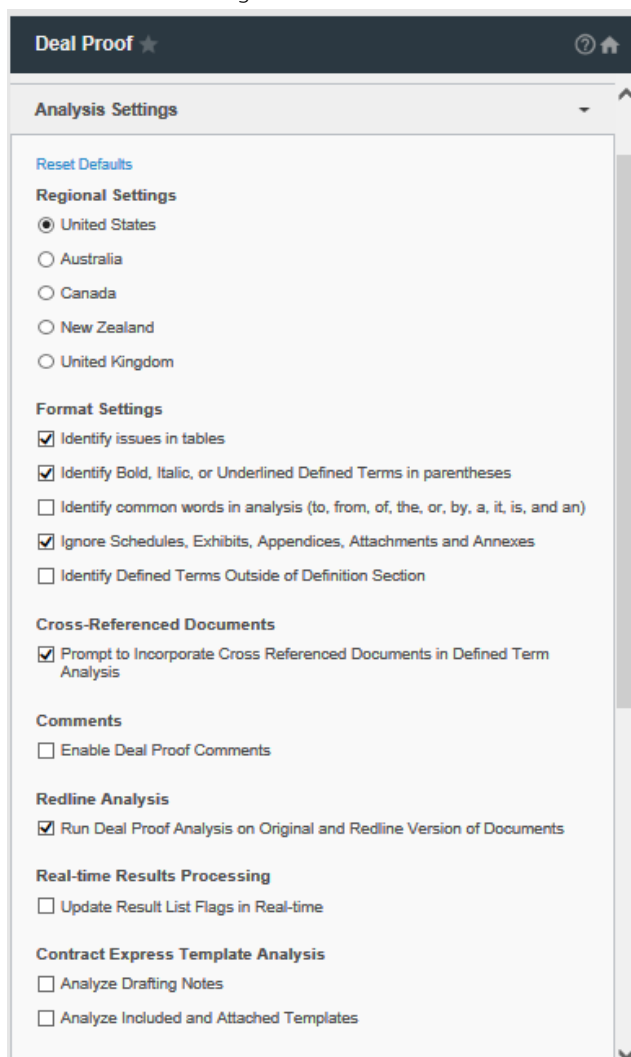
3. Type a name for the new profile in the **Profile Name** box (e.g., Purchase Agreements).
4. Choose from the options available under Analysis Settings, Display Options, Do Not Flag List, Suppress Flags and Custom Flag List, as further explained below.

### ANALYSIS SETTINGS

To select regional and formatting settings to be used during analysis, click **Analysis Settings**. The default settings are based on legal terminology and formatting that are typical for the registration key used to sign in. You can change the settings to reflect legal terminology and formatting for the United States, United Kingdom, Canada, Australia, and New Zealand, as needed.

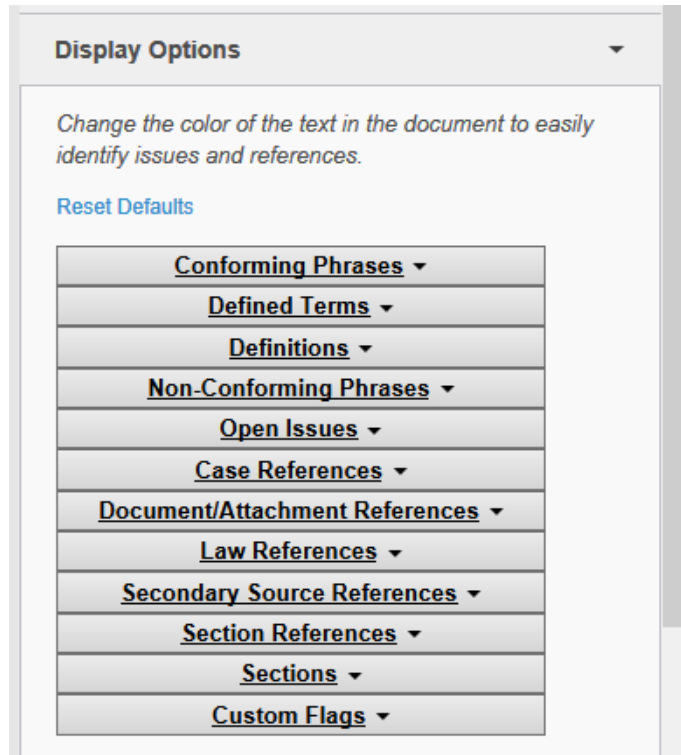
1. Select a location to use the legal language styles of that region. During analysis, Deal Proof uses terminology typical of the region to help in identifying elements in your document. For example, a lawyer in the U.S. would typically use "Defined Terms" or "Definitions" to introduce the section of a document that lays out what the parties intend certain words to mean within the document. A lawyer in the U.K. would typically use "Interpretations."
2. To identify defined terms and other flag types within tables, select **Identify Defined Terms in Tables**. In the United Kingdom, it is common practice to place defined terms in tabular format, in which case you would want to select this setting. In the United States, tabular format is usually reserved for data that is not defined terms, in which case you would want to clear this setting.
3. To identify defined terms based on text treatment (bold, italic, or underlining) and enclosure within parentheses, select **Identify Bold, Italic or Underlined Defined Terms in Parentheses**. If this setting is selected, Deal Proof identifies these elements as potential defined terms.

4. To identify common words when analyzing, select **Identify common words in analysis (to, from, of, the, or, by, a, it, is, and an)**.
5. Select **Ignore Schedules, Exhibits, Appendices, Attachments and Annexes** to exclude these items from analysis.
6. To identify defined terms that are not in a Definition Section, select **Identify Defined Terms Outside of Definition Section**.
7. Select **Prompt to incorporate Cross Referenced Documents in Defined Term analysis**, if desired.
8. Select **Enable Deal Proof Comments**, if desired.
9. Select to **Run Deal Proof analysis on original and redline version of documents**, if desired.
10. To automatically update Flags in the Result List as the document is edited, select **Update Result List Flags in Real-time**.
11. For Contract Express subscribers, select to Analyze Drafting Notes and/or Analyze Included and Attached Templates, if desired.
12. Click Reset Defaults to return the settings to their defaults.



## DISPLAY OPTIONS

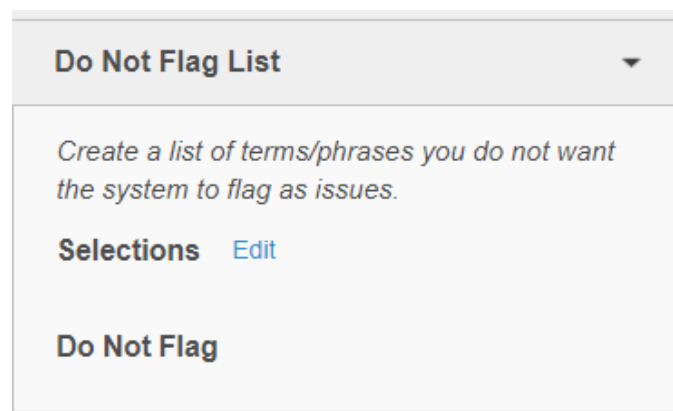
To change the display options and modify the text color in the document to easily identify issues and references, click **Display Options**. Use the **Text Color** list for each of the Flags and References and select a color. Click **Reset Defaults** to return the settings to their defaults.



### DO NOT FLAG LIST

To customize reports and results by not flagging certain terms, click **Do Not Flag List**. You can create a list of terms that you do not want to flag.

1. Click **Edit**.



2. Type a term in the **Term (not case-sensitive)** box and click **Add**. The term displays in the **Do Not Flag** list.
3. To remove a term, select the term and click **Remove Selected**.
4. Click **Save** to apply changes.

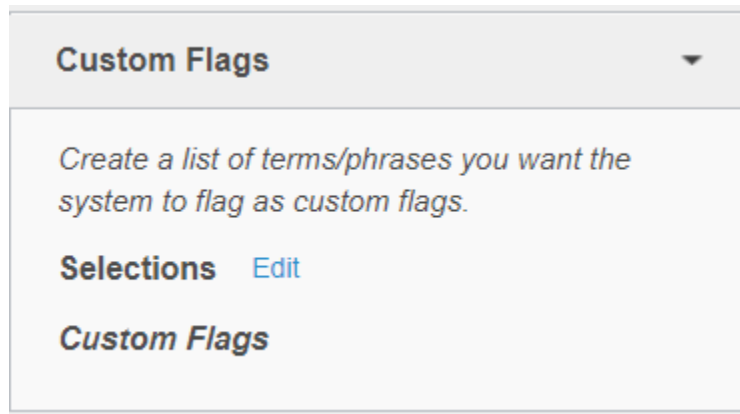
### SUPPRESS FLAGS

To customize reports and results by suppressing flags, click **Suppress Flags**. Clear the check boxes next to the type of flags you would like to suppress. Suppressing a flag does not eliminate color mark-up of the flag, but suppresses the flag from appearing in the Results list. Click **Reset Defaults** to revert to the default and include all flags in the analysis list.

## CUSTOM FLAG LIST

To designate terms you would like to be flagged during analysis, click **Custom Flags**. You can create a list of terms that you would like to flag in the current document and terms you would like to flag in all documents.

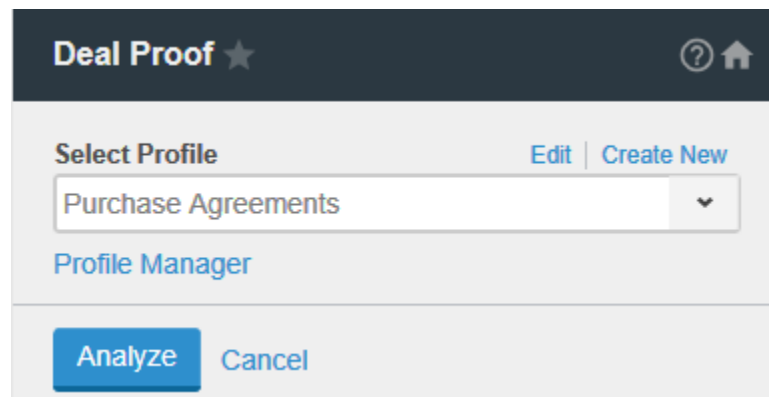
1. Click **Edit**.



2. Type a term in the **Term (not case-sensitive)** box and click **Add**. The term displays in the **Custom Flags** list.
3. To remove a term, select the term and click **Remove Selected**.
4. Click **Save** to apply changes.
5. Once finished selecting profile options, click Save.

## VIEWING, EDITING, AND DELETING DEAL PROOF PROFILE SETTINGS

1. Click **Deal Proof**.
2. Select the Profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. 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.

## Working with Profile Manager in Deal Proof

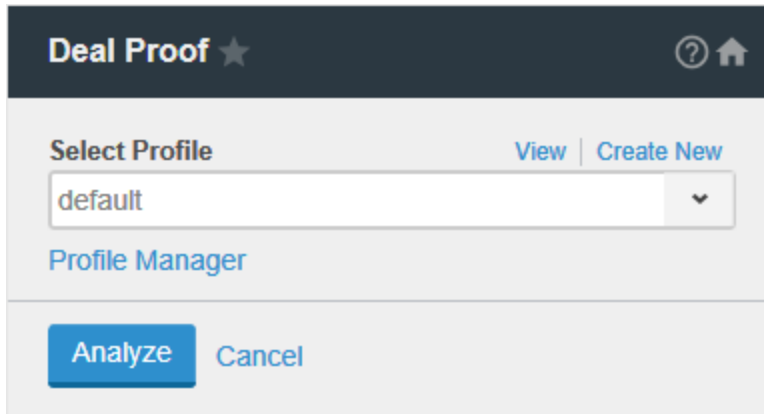
Deal Proof profiles can be shared with other Deal Proof users at the same account. Once shared, any changes to the profile by the profile creator will automatically be available to the recipient on the shared profile – no further action is required. The shared profile will appear for the recipient under the recipient's Shared with Me heading in the Profile Manager and within the recipient's profile selection list prior to Analyzing.

Please note that profiles under the recipient's Shared with Me heading will no longer be available to the recipient under that heading if the profile creator stops sharing with the recipient, deletes the profile or no

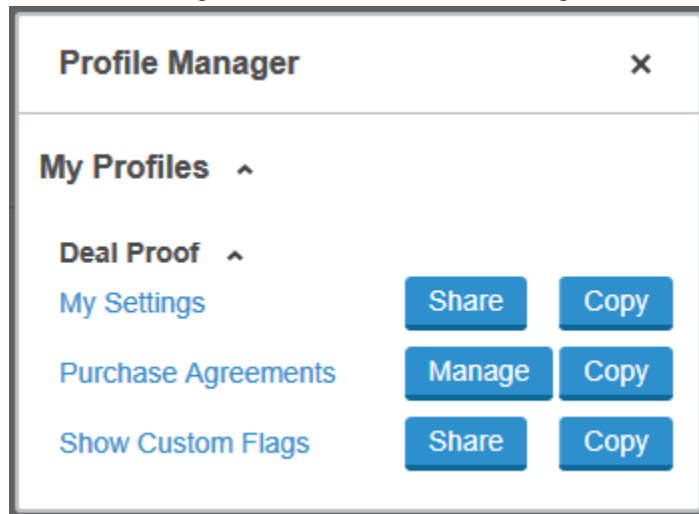
longer has an active registration key on the account. Recipients may proactively Copy a profile that exists under the Shared with Me heading, and it will then be available under My Profiles.

### SHARING PROFILES

1. Click **Deal Proof**.
2. Click **Profile Manager**.



3. Under My Profiles, choose the profile you would like to share and click Share. If you have already shared a profile and would like to manage who it is shared with, click Manage.



4. Search for people using the search box or select people from the alphabetical list. If desired, create a Group, by clicking Add Group and searching for people using the search box or selecting people from the list, then entering a Group Name and Clicking Save Group.
5. Once you have selected people or groups, click Share Profile.
6. For recipients, the profile will appear under the Shared with Me heading within Profile Manager (Fig. 1) and within the recipient's profile selection list prior to Analyzing (Fig. 2).

Fig. 1

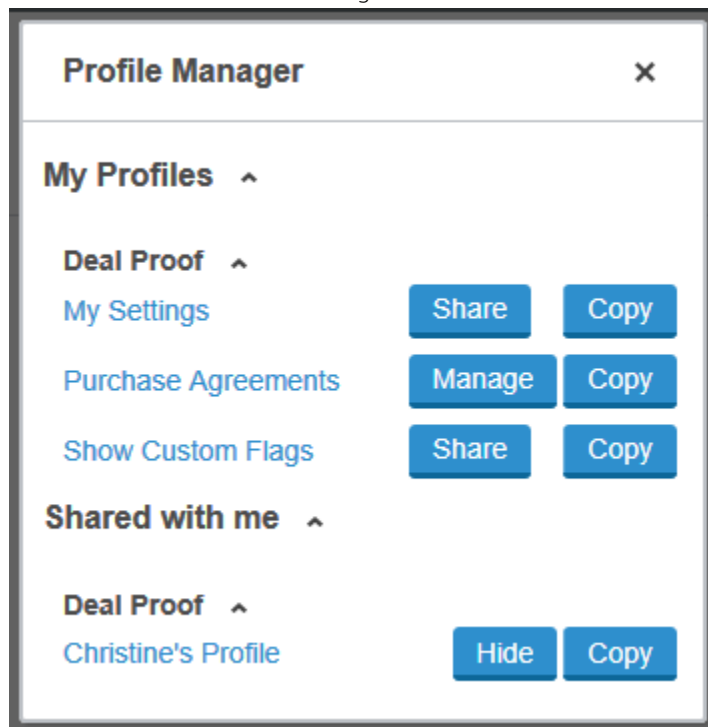
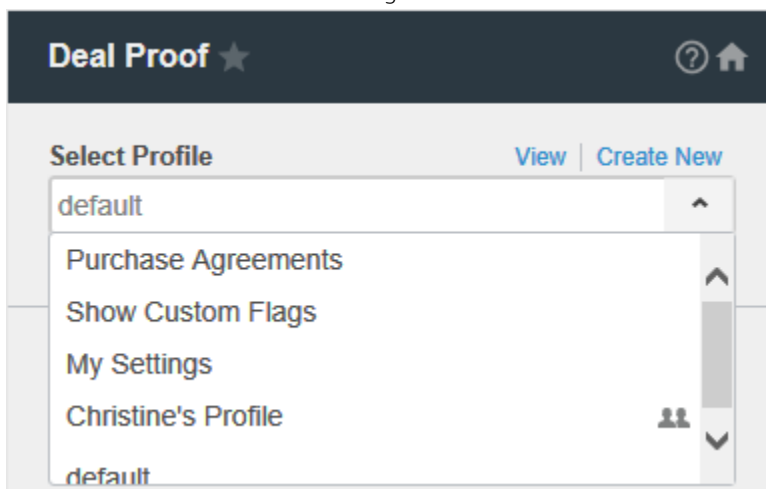


Fig. 2



### Working with Deal Proof

Locate errors and inconsistencies in your document, analyze references, and generate reports using the Deal Proof tool.

#### ANALYZING A DOCUMENT

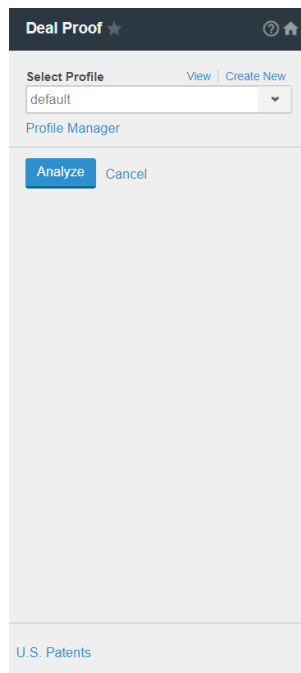
These items are checked when a document is analyzed:

- Terms that appear to require definitions have been defined.
- Defined terms are located in the document and defined only once.
- Defined terms are located as stated in the document.
- Entries in the definition section are alphabetized.

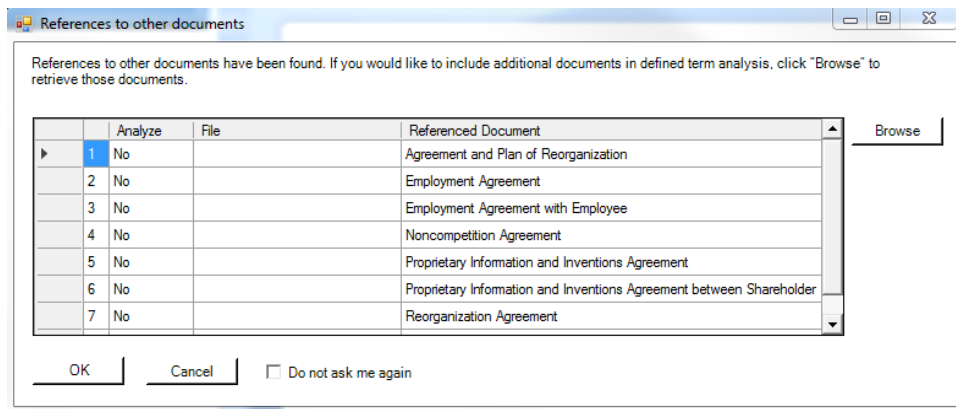
- Punctuation is properly paired.
- Similar phrases and expressions are stated with consistency.
- Numeration is correct at all levels in the document.
- Open issues in the document have been addressed.
- Date errors that may need to be corrected.
- Internal cross-references that are invalid or not bookmarked.
- Inconsistencies between the Key Parties identified versus those that appear in the signature block of the document.

You can locate errors and inconsistencies in your document. Further, if your main document contains references to other documents, the referenced documents can be analyzed as well. For example, if your main document uses a term that is defined in a separate document, the software can verify that the term is defined in that document. When analyzing a document, no changes are made to the content of your document.

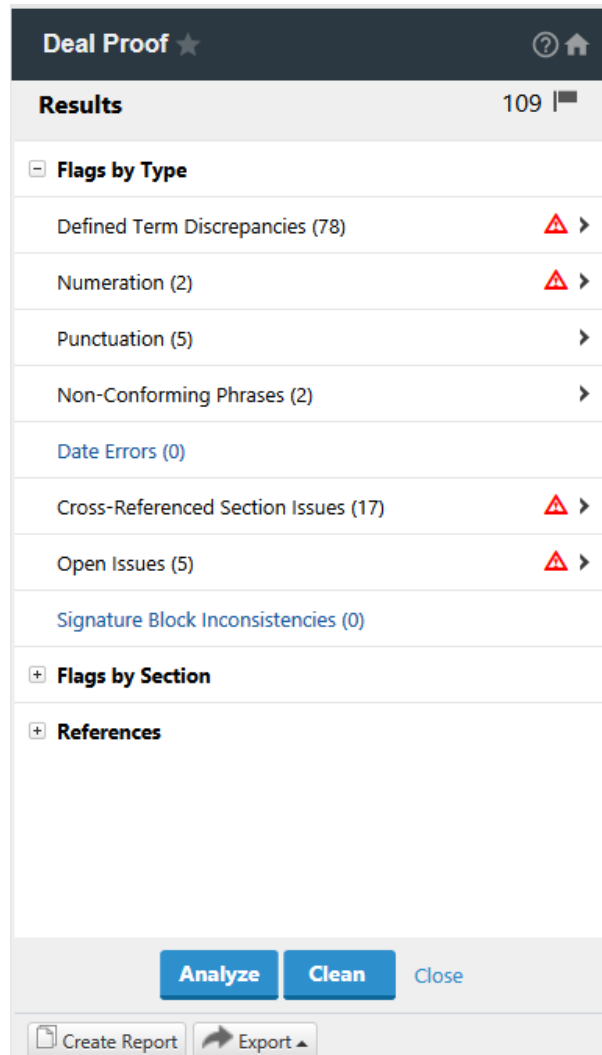
1. Click **Deal Proof**.
2. Click **Analyze**.



3. If references to other documents are detected, a list of references displays. For each referenced document you want to include in the analysis, click **Browse**, locate the file, and click **Open**.
4. When you are finished linking files to referenced documents, click **OK** to continue analysis. Your draft document and the selected referenced documents are analyzed.



5. All potential errors and inconsistencies and references display in the left pane.
6. Expand/collapse the lists of flags and references found in the document and click the Flag and Reference types to go to the flag or reference link.
7. Click the flag or reference link to go to the flag or reference in the document text.

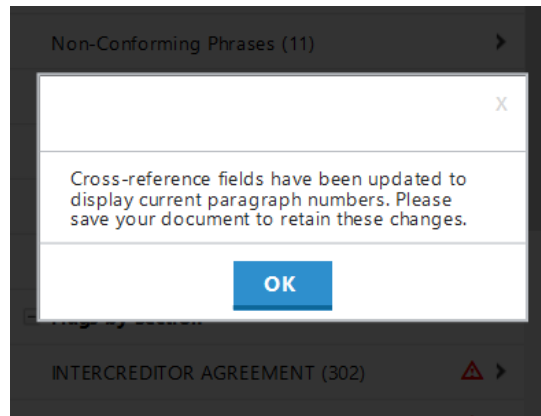


8. For more information on the types of flags and references listed, see "Understanding Flags" on page 79 and "Understanding References" on page 81.
9. If **Update Result List Flags in Real-time** has been enabled (see "Working with Deal Proof Settings" on page **Error! Bookmark not defined.** for more information), the results list will refresh each time a change is made to the document.
10. Click **Create Report** to generate a report of the analysis. For more information, see "Creating Reports" on page 78.
11. Click **Export** and select **Download** to open the results in a separate document. Select **Email** to send the results as a Microsoft Outlook attachment. Click **Deliver Report**.

12. Click **Clean** to remove all markings inserted in your document and close the Results pane. Cleaning a document does not remove any of the substantive changes you make to the content of the document during the analyzing process. After cleaning a document, you can forward it to others, with no evidence of analysis.

### UPDATING CROSS-REFERENCES FIELDS

If you use Word bookmarks to link internal cross-references, fields need to be refreshed or updated to capture current paragraph numbers and correctly identify invalid cross-references. The update that will occur when you analyze a document in Deal Proof is as if you performed the same operation directly through Word. After analysis and review through Deal Proof, save the document to retain those updated fields.



### HIGH RISK INDICATORS

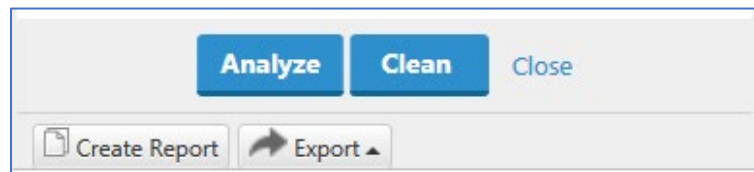
Within Deal Proof analysis results, you may see the High Risk Indicator icon (⚠️). This icon identifies potentially high-risk errors in the document that may lead to ambiguity or confusion, and potentially litigation. If you are pressed for time when reviewing the document, you can focus your attention on these errors.

Once the errors are corrected or dismissed, the icon will disappear.

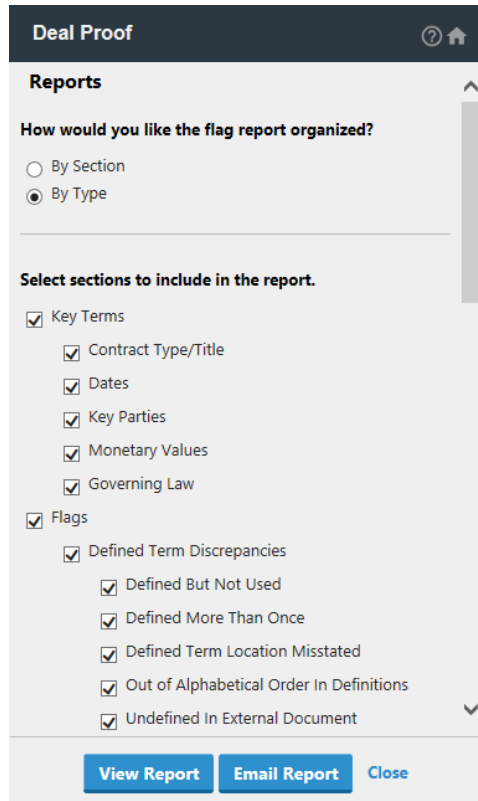
### CREATING REPORTS

After analyzing a document (see "Analyzing a Document" on page 75 for more information), you can generate reports for key terms, flags, references, and an outline.

1. Click **Deal Proof**.
2. Click **Create Report**.







3. Select **By Section** or **By Type** to indicate the flag report organization.
4. Select **Download** or **Email** from the delivery options. Select a format from the **Format** list.
5. Select any or all **Key Terms** to include in your report.
6. Select any or all of the **Flags** and **References** you want to include in your report.
7. Select the **Outline** check box to create a report that shows an outline of key sections in your document.
8. Click **Generate Report**.



To customize reports and results by suppressing certain flags, see "Working with Deal Proof Settings" on page **Error! Bookmark not defined.**

### Understanding Flags

After analyzing your document, all potential errors and inconsistencies display in the results pane. For more information on analyzing a document, see "Working with Deal Proof" on page 70.

[-] <b>Flags by Type</b>	
Defined Term Discrepancies (43)	 >
Numeration (4)	 >
Punctuation (2)	>
Non-Conforming Phrases (2)	>
Date Errors (4)	 >
Cross-Referenced Section Issues (2)	 >
Open Issues (0)	
Signature Block Inconsistencies (3)	>

#### DEFINED TERM DISCREPANCIES

These flags show potential issues and inconsistencies in defined terms, including the following:

- **Defined But Not Capitalized:** A term is defined but not capitalized.
- **Defined But Not Used:** A term is defined but not used in the document.
- **Defined More Than Once:** A term is defined more than once in the document.
- **Defined Term Location Misstated:** A term is defined in the main document but references to the term incorrectly state the location of the definition.
- **Out of Alphabetical Order:** A term in the definition section appears to be out of alphabetical order.
- **Undefined:** A term is used with initial caps in the middle of a sentence but is not defined in the document. That is, the term appears to require a definition but is not covered in the definitions section of the document.

### **NUMERATION DISCREPANCIES**

These flags help ensure that you use consistent numbering throughout your document. Deal Proof also flags numbers that are out of sequential order.

### **UNPAIRED PUNCTUATION**

These flags help locate any unpaired punctuation in the document, including unpaired brackets, parentheses, and quotation marks. For example, unpaired punctuation might include using an opening parentheses or bracket but not the closing parentheses or bracket, or using an opening quotation mark but not a closing quotation mark.

### **NON-CONFORMING PHRASES**

These flags help you focus on any inconsistent language in the document. Deal Proof finds the conforming phrases in the document and checks to see that similar phrases and expressions are used consistently throughout the document.

For example, suppose it is important that your document always use the expression “similar foreign, federal, state, or local statute.” In one instance, however, you use “foreign or federal” instead. Deal Proof flags the latter instance as a non-conforming phrase.

### **DATE ERRORS**

Flagged items will help identify dates that may need to be updated or corrected. Date Errors include incorrectly stated weekdays (*Monday March 5, 2019*), invalid dates (*September 31*), or dates that are ambiguous because they are missing a specific year or day of the month.

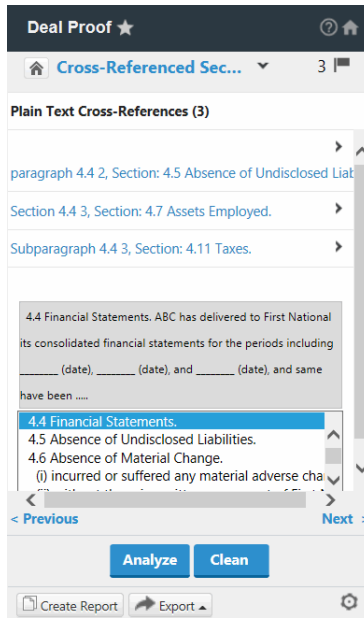
### **CROSS-REFERENCED SECTION ISSUES**

Internal Cross-References can often be made inaccurate by edits and revisions made during made to the document. If the target of a bookmarked cross-reference is deleted from the document, Word will create a field code error which will be identified as an Invalid Cross-Reference.

Using Word bookmarking for internal cross-references is a helpful way to improve document navigation for the reader. Plain-text cross-references will be flagged so you can identify which references have not yet been bookmarked.

To help clarify which clause is being referenced drafters often indicate in parenthesis the title of the target clause (*Clause 22 (Indemnification)*). If the actual title of the referenced clause does not match what is provided, the item will be flagged.

For all cross-referenced sections, if corrections to the reference are required, select the correct reference from the drop-down to update the reference.



If the document contains auto-numbering, a link to the correct reference will be automatically created.

## OPEN ISSUES

These flags show any blank spaces, multiple question marks, and dates or information that need to be finalized before the document is ready. Any open issues are flagged in brackets.

Open issues are identified as follows:

- Square/angle brackets (and the text between them).
- Bullet characters.
- Two or more consecutive uses of the letter "x", except as document numeration.
- Question marks and other characters (# \* @ ! \$).
- Underscores or underlined spaces (if not found in the Signature Section of a document).
- Words or phrases identified as incomplete, where the language is in **bold**, *italics*, or underlined.

## SIGNATURE BLOCK INCONSISTENCIES

Key parties will be identified and compared to any signature blocks found in the document. Unidentified Key Parties are flagged if they are found in the signature block but have not been listed on a cover page or in the introductory paragraphs of the document. Key Parties identified in the document that do not appear in the Signature Block by name are flagged as Unrepresented Parties.

## Suppressing Flags

To customize reports and results by suppressing certain flags, see "Working with Deal Proof Settings" on page **Error! Bookmark not defined.**

## Understanding References

After analyzing your document, all references in the document are marked in the document and listed in the results pane. For more information on analyzing a document, see "Working with Deal Proof" on page 70. The following types of references are marked:

References	
Defined Terms (329)	>
Conforming Phrases (81)	>
Dates (46)	>
Cross-Referenced Sections (454)	>
Cross-Referenced Documents (48)	>
Key Parties (14)	>
Cited Sources (49)	>
Monetary Values (64)	>

## DEFINED TERMS

Terms that have been defined in your document are marked.

## CONFORMING PHRASES

For each main phrase, the instances of that phrase in your document are marked. Expressions in your document do not need to be identical to be considered conforming phrases. For example, consider the phrase *have been exercised*. The following conforming phrases would display:

- deemed to *have been exercised* and such
- deemed to have been exercised immediately
- warrants have been exercised

## DATES

Dates identified in the document organized by Past, Future and Ambiguous. For more information, see Date Errors in "Understanding Flags" on page 79.

## CROSS-REFERENCED SECTIONS

Sections of your document that cross-reference other sections in your document are marked. For cross-referenced sections that are valid, click the cross-reference to preview the reference, or click the arrow to open a split screen to easily view both the cross-reference and reference, without losing your place.

The screenshot shows the Deal Proof interface with a split-screen view. On the left, a sidebar displays a list of cross-referenced sections, including:

- Section 4.2.3, Section 1.3 "Additional Capital Contribution" has the meaning set forth in Sec...
- Section 4.2.6, Section 1.19 "Capital Account" shall have the meaning set forth in Section...
- Section 4.2.7, Section 1.29 "Contributing Member" shall have the meaning set forth in...
- Section 4.2.34, Section 12.6(i) Notwithstanding the foregoing, in the event the Board of Dir...

The main document view on the right shows the following text:

**1. DEFINITIONS.** As used herein, the following terms have the following meanings.

**1.1 "Accounting Principles"** means the accounting principles of the Company determined in accordance with generally accepted accounting principles by the Manager and applied on a consistent basis.

**1.2 "Act"** means the Gotham Limited Liability Company Act, Gotham Code Annotated Section 18-101 et seq., as amended from time to time.

**1.3 "Additional Capital Contribution"** has the meaning set forth in [Section 4.2 hereof](#).

**1.4 "Additional Member"** means a Person who is admitted into the Company as a member on the date hereof.

**4.2 Capital Accounts.** A capital account shall be established and maintained for each Member for the full term of this Agreement in accordance with the capital account maintenance rules of Section 1.704-1(b)(2)(iv) of the Regulations (a "Capital Account"). Each Member shall have only one Capital Account, regardless of the number or classes of Units or other interests in the Company owned by such Member and regardless of the time or manner in which such Units or other interests were acquired by such Member.

**4.3 Additional Capital Contributions.**

(a) If funds are required for any expenditure of the Company necessary for the operation of the Company and/or any expansion of the Company, the Company shall seek such funds in the following order of priority: (i) cash generated by the operations of the Company; (ii)

For all cross-referenced sections, if corrections to the reference are required, select the correct reference from the drop-down to update the reference. If the document contains auto-numbering, a link to the correct reference will be automatically created.

#### **CROSS-REFERENCED DOCUMENTS**

Names of cross-referenced documents are marked.

#### **KEY PARTIES**

List of parties to the contract from the cover page and/or the introductory sections of the document. For more information, see Signature Block Inconsistencies in "Understanding Flags" on page 79.

#### **CITED SOURCES**

Sources such as law, cases, and secondary sources that are cited in your document are marked.

#### **MONETARY VALUES**

Monetary values included are the: US Dollar (USD), British Pound (GBP), Euro (EUR), Canadian Dollar (CAD), Australian Dollar (AUD), New Zealand Dollar (NZD), and associated symbols.


# About Case Notebook

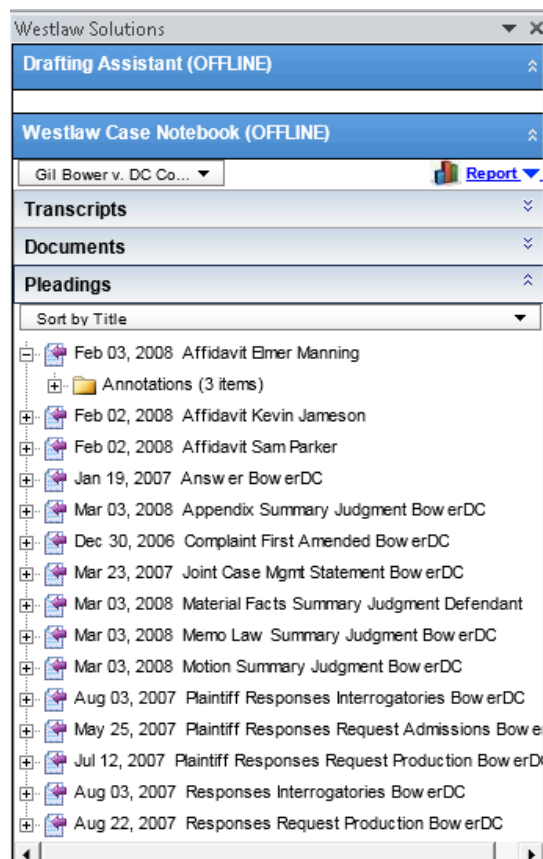
## Working with Case Notebook Data

A licensed, installed version of Case Notebook integrates with Drafting Assistant allowing you to view and work with transcripts, documents, pleadings, and research documents from within Word. When you import additional transcripts, documents, pleadings, and research documents into Case Notebook, the data automatically displays in the associated category in the Drafting Assistant Case Notebook pane. For complete information on using Case Notebook, download a free copy of the Case Notebook User Guide at <http://legalsolutions.thomsonreuters.com/law-products/c/p/990001143>.

## VIEWING AND SENDING CASE NOTEBOOK DATA

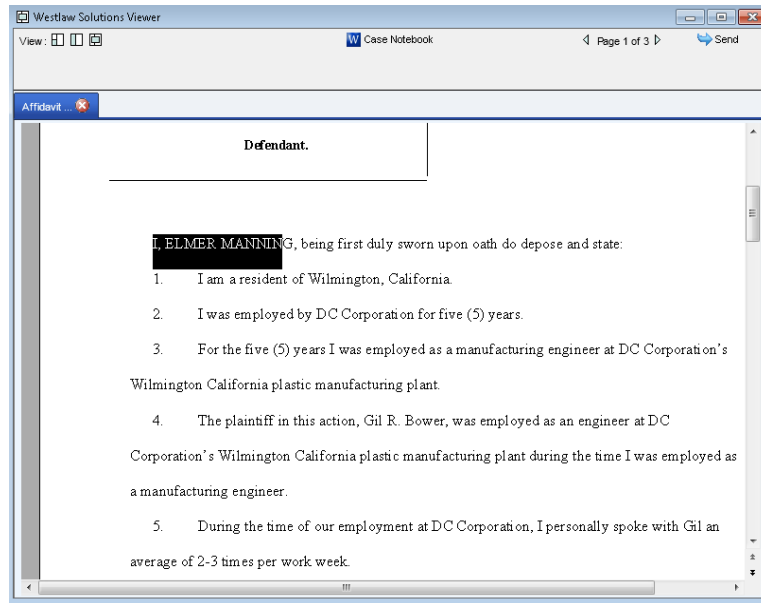
View or send Case Notebook data using Drafting Assistant:

1. Click **Case Notebook**.
2. Select a Case Notebook case from the **Select Matter** list. Categories of case data display on the left side of your document.
3. Click to open a category (for example, **Pleadings**) and double-click any item in a category to display that information in the viewer. If you open multiple items in the viewer, tabs display for each item. Click the close button (  ) to close a tab, if desired.



5. While viewing Case Notebook data, you can select and insert text into your document. Select the text in the viewer, click where you want to insert the text in your draft document, and click **Send** in the viewer. To view the document in Case Notebook, click **Case Notebook** in the viewer.
6. If you are working with Image or PDF files, you can select and drag text from the viewer to your draft document. If you do not want to select and drag text, select text in the viewer, click **Send list** (

Send ( ), and select one of the provided options. The document (or selection) displays in your drafting document and is available to use with Drafting Assistant features, including those that leverage document text and citations.



### WORKING WITH CASE NOTEBOOK REPORTS

Use Drafting Assistant to generate Case Notebook reports for annotations, issues, key facts, cases, and full-text search.

1. Click **Case Notebook**.
2. Select a Case Notebook case from the **Select Matter** list.
3. Click the **Report** list and select the type of report you want to generate. For detailed information on generating reports in Case Notebook, refer to the Case Notebook User Guide at <http://legalsolutions.thomsonreuters.com/law-products/c/p/990001143>.



3. After you generate the report, click the **Send** list in the viewer and select to send the **Active Item** or **All Items** to your draft document.

# About Search km

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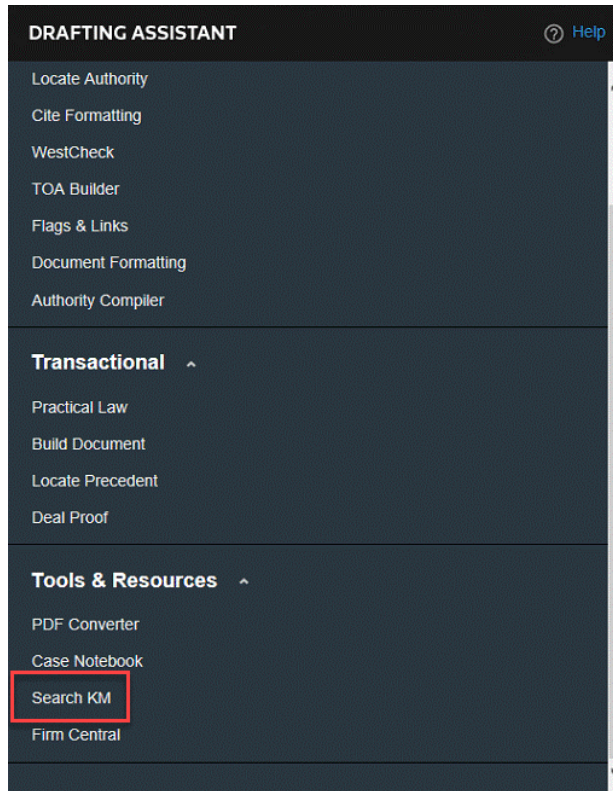
West km is a knowledge management product that helps you easily find and reuse your organization's best work. In Drafting Assistant, you can search your organization's West km content—such as briefs, pleadings, and memos from your litigation collection, or agreements, forms, and regulatory filings from your transactional collection—and then use that content as you draft new legal documents.

Features are launched from within Microsoft Word.

- To access West km documents in Drafting Assistant, click **Search km**.
- To search West km Litigation documents, click the type of search you want to perform, type your Terms and Connectors query or Natural Language description in the box, and click **Search**. If desired, you can restrict your search to particular library groups or specific fields (types of data). For more information, see "Searching in West km" on page 86.
- To search West km Transactional documents, click the type of content you want to search, type your search terms in the appropriate boxes, and click **Search**. If desired, you can restrict your search to particular library groups or specific fields (types of data). For more information, see "Searching in West km" on page 86.
- When you type search terms, you can use connectors and special characters to change relationships between your search terms and retrieve variations of search terms. For details, see "Using Terms and Connectors" on page 95.
- To view a document in a search result, click its title. For details, see "Viewing Documents and Summaries" on page 91.
- To view a summary of a document, click **Summary** when viewing the search result or a document. For details, see "Viewing Documents and Summaries" on page 91.

## Searching in West km

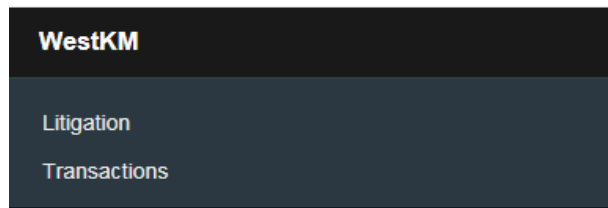
Your West km content is integrated with Drafting Assistant to help you draft legal documents. In Drafting Assistant, you can search your organization's West km content—such as briefs, pleadings, and memos from your litigation collection, or agreements, forms, and regulatory filings from your transactional collection—and then use that content as you draft new legal documents. You can also insert KeyCite status flags for each citation in your document, create links from citations to the full-text documents on Westlaw, and easily access citing documents in your organization's West km content.



## SEARCHING LITIGATION DOCUMENTS

You can quickly search for specific text in a West km document or for the title of a document.

1. Click **Search km**.
2. Select **Litigation** from the West km list.



3. Type a **Terms and Connectors** query or a **Natural Language** description in the box and select the appropriate link.  
By default, the OR connector is used between terms. To view connectors and special characters you can use between terms, see "Using Terms and Connectors" on page 95.
4. Select or clear check boxes on the **Library Groups** panel to include or exclude library groups from the search.

West km

Litigation  
demurrer Search

Terms and Connectors [Natural Language](#)

Library Groups  
Select All | Clear All

- Chicago
- LA Office
- NY Office
- Philadelphia

Fields

- West km Fields
- Document Fields
- Profile Fields
- Custom

5. If you are using a Terms and Connectors query, you can restrict all or part of your search to specific fields (types of data) on the **Fields** panel.
  - Type or select information in one or more fields on the **Fields** panel to add the field criteria to the search. By default, the AND connector is used to connect field criteria.
  - As an alternative to using the **Fields** panel, you can restrict your search by adding field restrictions to a full-text search. This method allows you to use field restrictions with special characters and connectors other than AND between fields. For details, see "Using Field Restrictions" on page 93.
6. Click **Search**.

West km

Litigation  
demurrer Search

Terms and Connectors [Natural Language](#)

Library Groups

Fields

West km Fields

Clear All

Comments:

Limit Search to:

- Exemplar Document
- Exemplar Form
- Results with Comments

Document Fields

Clear All

Litigation Doc Title

Doc Type

Jurisdiction:

Court

Attorney

Company

Expert

Judge - Primary

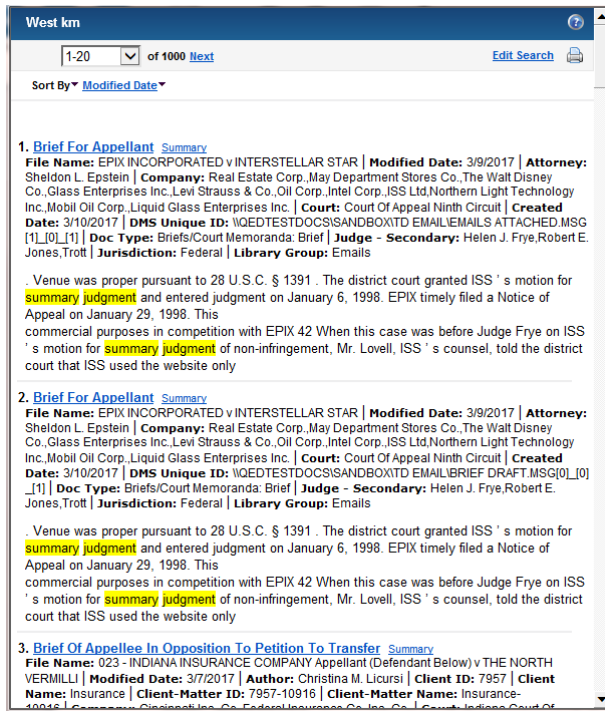
Judge - Secondary

Law Firm

Profile Fields

Custom

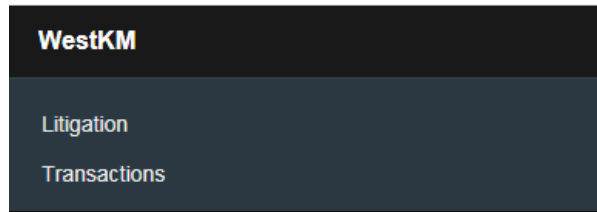
The list of documents matching your search criteria display. For details, see "Browsing a Result List" on page 91.



## SEARCHING TRANSACTIONAL DOCUMENTS

You can quickly search for specific text or for the title of a document, clause, or defined term.

1. Click **Search km**.
2. Select **Transactions** from the West km list.



3. Click the type of content you want to search: **Documents**, **Clauses**, or **Defined Terms**.
4. Type your search terms in the **Title** and/or **Text** boxes.
  - By default, the AND connector is used between terms to retrieve one or both terms. For example, type *partner liability* to retrieve transactional documents that contain both of the terms *partner* and *liability*. To view connectors and special characters you can use between terms, see "Using Terms and Connectors" on page 95.
5. If you search by title and want West km to automatically add root expanders, synonyms, and related concepts to your search terms, select the **Expand** check box.
6. Select or clear check boxes on the **Library Groups** panel to include or exclude library groups from the search.

**West km** ⓘ

**Transactions**

Transactional Doc Title   Expand

Document Text

[Documents](#) [Clauses](#) [Defined Terms](#)

---

**Library Groups** ⌵

[Select All](#) | [Clear All](#)

- Chicago
- LA Office
- NY Office
- Philadelphia

---

**Fields** ⌵

- Document Fields ⌵
- Profile Fields ⌵
- West km Fields ⌵
- Custom ⌵

7. To restrict your search to specific fields (that is, types of data), enter criteria on the **Fields** panel. For example, you might want to restrict your search to documents written by a single author.
  - Type or select information in one or more fields on the **Fields** panel to add the field criteria to the search. By default, the AND connector is used to connect field criteria.
  - As an alternative to using the **Fields** panel, you can restrict your search by adding field restrictions to a full-text search. This method allows you to use field restrictions with special characters and connectors other than AND between fields. For details, see "Using Field Restrictions" on page 93.
8. Click **Search**.

**West km** ⓘ

**Transactions**

Transactional Doc Title   Expand

Document Text

[Documents](#) [Clauses](#) [Defined Terms](#)

---

**Library Groups** ⌵

**Fields** ⌵

**Document Fields** ⌵

[Clear All](#)

Clause Title

Defined Term Title

Attorneys

Governing Law

Law Firm

Parties

---

**Profile Fields** ⌵

[Clear All](#)

Abstract

Author

Client ID

Client Name

Created Date  After:    Before:

DMS Doc Type

DMS Number

---

**West km Fields** ⌵

**Custom** ⌵

The list of documents matching your search criteria display.

West km

1-20 of 191 [Next](#) [Edit Search](#)

Sort By [Modified Date](#)

- SERIES A WARRANT AGREEMENT** [Summary](#)  
File Name: WARRANT AGREEMENT | Modified Date: 12/12/2016 | Author: westkm | Client ID: 0001 | Client Name: John Doe | Client-Matter ID: 0001-9999 | Client-Matter Name: John Doe Private Equity | Created Date: 12/12/2016 | DMS Doc Type: Agreement | DMS Number: 1 | DMS Unique ID: WARRANT AGREEMENT | Execution Date: January 27, 2012 | Governing Law: New York | Library Group: Transactional | Matter ID: 9999 | Matter Name: Private Equity | Parties: BR Holdings, Inc. | Version: 1 | Exemplar: 1
- ASSET AND STOCK PURCHASE AGREEMENT** [Summary](#)  
File Name: Stock Purchase Agreement | Modified Date: 11/5/2015 | Attorneys: Thomas H. Curzon, Esq., Sarah Strunk, Esq. | Author: Catherine Beck | Client ID: 1065 | Client Name: Corporate | Client-Matter ID: 1065-9660 | Client-Matter Name: Corporate-Transactional | Created Date: 3/30/2006 | DMS Doc Type: NULL | DMS Number: 6548 | DMS Unique ID: 6548 | Governing Law: Arizona | Law Firm: Osborn Maledon, P.A., Fennemore Craig P.C. | Library Group: Transactional | Matter ID: 9660 | Matter Name: Transactional | Version: 1
- PLEDGE AGREEMENT** [Summary](#)  
File Name: Pledge Agreement | Modified Date: 2/13/2010 | Author: Robert Sanchez | Client ID: 1065 | Client Name: Corporate | Client-Matter ID: 1065-9660 | Client-Matter Name: Corporate-Transactional | Created Date: 1/24/2008 | DMS Doc Type: NULL | DMS Number: 6567 | DMS Unique ID: 6567 | Execution Date: 20th day of September, 2000 | Governing Law: North Carolina | Library Group: Transactional | Matter ID: 9660 | Matter Name: Transactional | Parties: CAREY INTERNATIONAL, INC., LIMOUSINE HOLDINGS, LLC, First Union National Bank, FIRST UNION NATIONAL BANK | Version: 1
- SECURITY AGREEMENT** [Summary](#)  
File Name: Security Agreement | Modified Date: 2/12/2010 | Author: Robert Sanchez | Client ID: 1065 | Client Name: Corporate | Client-Matter ID: 1065-9660 | Client-Matter Name: Corporate-Transactional | Created Date: 1/23/2008 | DMS Doc Type: NULL | DMS Number: 6566 | DMS Unique ID: 6566 | Execution Date: 20th day of September, 2006 | Governing Law: North Carolina | Library Group: Transactional | Matter ID: 9660 | Matter Name: Transactional | Parties: LIMOUSINE HOLDINGS, LLC, CAREY INTERNATIONAL, INC., FIRST UNION NATIONAL BANK | Version: 1

## BROWSING A RESULT LIST

Retrieved documents display in the result list. To view a document, click its title. For more information, see "Viewing Documents and Summaries" on page 91.

- Documents retrieved from a search are listed in reverse chronological order (based on the date the document was last modified), in order of relevance, or by the number of term hits, depending on your organization's settings.
- To change the sort order of the result list, point to **Sort By** at the top of the result list and then click a category.
- When the result list has more than 20 listings, click the **Next** arrow to view additional listings.
- For each item in a search result, the first three search terms are shown in the result list with surrounding document text and the search terms are highlighted in yellow.
- To view a summary of a document, click the **Summary** link. For details, see "Viewing Documents and Summaries" on page 91.
- To change your search, click **Edit Search**.
- To print the result list, click the **Print** button () at the top of the result list.


## Viewing Documents and Summaries

After searching for documents using West km, you can access the full document text or a summary of document from the search results list.



## VIEWING A DOCUMENT

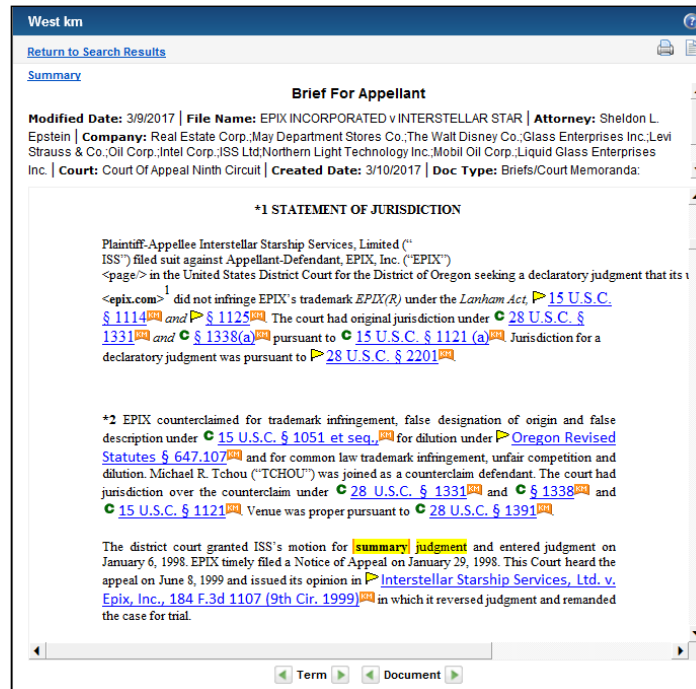
To view the full text of a West km document, clause, or defined term, click its title in the search result.

- Search terms are highlighted and the first occurrence of the term automatically displays.
- Click the citation to go to the cited document on Westlaw.
- For each citation that has available KeyCite information, a KeyCite status flag is displayed before the citation. To access additional KeyCite information for the citation, click the flag. For more information, see "About KeyCite Status Flags" on page 26.

- For each citation that is referenced in other indexed documents at your organization, the km icon () displays after the citation. Click the icon to view the citing documents.

You have the following options:

- Select and drag text from the West km document to your draft document.
- Click **Print** () at the top of the document.
- Click the **Load Copy** button () to open a copy of the document in its original format.
- Click **Return to Search Results** to return to your search results.
- Click **Summary** to view details about the document.



## VIEWING A SUMMARY

You can view the summary of a West km document that you have retrieved. When searching Transactional content, you can also view summaries from retrieved clauses and defined terms. To access a summary, click **Summary** next to the document title or at the top of the document. Document summaries may include the following sections:

- **Document Profile:** Displays data that was generated by West km during analysis. Click a link in the profile to go to the reference.
- **File Profile:** Displays metadata such as file title, author, created and modified date, and client and matter information. The library groups (for example, office locations) to which the document is assigned are also included.
- **KeySearch Topics** (Litigation documents): Displays the topics to which the document is assigned.
- **Outline** (Transactional documents): Displays an outline of the document. Click a link in the outline to go to that section.
- **Defined Terms** (Transactional documents): Click a term to go to its definition in the text of the document or clause.
- **Referenced Documents** (Transactional documents): Shows a list of all documents explicitly referenced in the document you are viewing. Click a document title to go to its reference in the document you are viewing.

**West km**

[Return to Search Results](#)

**Memorandum Of Points And Authorities In Opposition To Demurrer To Second Amended Complaint**

**Modified Date:** 1/9/2017 | **File Name:** 041 - Ross E STROMBERG and Robert C Ohlmann Plaintiffs v PINOLE RADIATION ONCOLO | **Attorney:** | **Author:** Narotsky, Eleanor | **Client ID:** 5804 | **Client Name:** Securities | **Client-Matter ID:** 5804-8763 | **Client-Matter Name:** Securities-8763 | **Company:** Ford Motor Land Development

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**Document Profile**

**Attorney:**

**Company:** Ford Motor Land Development Corp. ([Westlaw Profile](#)); W.R. Grace & Co. ([Westlaw Profile](#))

**Court:** California Superior Court

**Doc Type:** Briefs/Court Memoranda: Memorandum

**Expert:**

**Jurisdiction:** California

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**File Profile**

**Abstract:**

**Author:** Narotsky, Eleanor

**Client ID:** 5804

**Client Name:** Securities

**Client-Matter ID:** 5804-8763

**Client-Matter Name:** Securities-8763

**Created Date:** 2/1/2017 12:00:00 AM

**DMS Doc Type:**

**DMS Number:** 2672

**Library Group:** Securities

**Matter ID:** 8763

**Matter Name:** 8763

**Modified Date:** 1/9/2017 12:00:00 AM

**Version:** 1

[Return to Document](#)

The following is only applicable to summaries of Transactional documents:

- Clause summaries include a clause and document profile, outline, and defined terms, if applicable.
- Defined term summaries include a defined term, document profile and an outline.
- If multiple instances of the same metadata, defined term, or referenced document are found, the item is listed only once in the summary. The number of instances display in parentheses after the item. Click the item to go to the first instance in the text of the document or clause.

## Using Field Restrictions

As an alternative to using the Fields panel, you can restrict your search by adding field restrictions to a full-text search. This method allows you to use field restrictions with special characters and connectors other than having AND between fields for transactional documents or having OR between fields for litigation documents.

The types of field restrictions available may depend on what type of document you search. The following types of field restrictions may be available to you:

### PROFILE FIELDS

Field	Abbreviation	Example
<b>Author</b>	au	au(john /3 maxwell)
<b>Abstract</b>	abst	abst("motion to dismiss")
<b>Client ID</b>	cid	cid(1587)
<b>Client Name</b>	cn	cn(reardon)
<b>Client-Matter ID</b>	cmid	cmid(1587-2228)
<b>Client-Matter Name</b>	cmn	cmn(reardon & pritchard)

<b>Created Date</b>	cd	cd(1/14/2004) cd(1/2004) cd(2004) cd(aft 1/14/2004) cd(aft 1/2004) cd(bef 1/30/2004) cd(bef 2004) cd(aft 2000 & bef 2004)
<b>DMS Doc Type</b>	dt	dt(brief or memo!)
<b>DMS Number</b>	dn	dn(32027)
<b>File Name</b>	ti	ti(nevada & blueson)
<b>Matter ID</b>	mi	mi(1587-2228)
<b>Matter Name</b>	mn	mn(pritchard)
<b>Modified Date</b>	md	md(2/14/2004) md(2/2004) md(2004) md(aft 2/14/2004) md(aft 2004) md(bef 2/27/2004) md(bef 1/2004) md(aft 2001 & bef 2004)
<b>Custom 1</b>	cus1	cus1(antitrust)
<b>Custom 2</b>	cus2	cus2(expert!)
<b>Custom 3</b>	cus3	cus3(form-agrmt-lit)

#### LIBRARY GROUP FIELDS

Field	Abbreviation	Example
<b>Library Group</b>	lg	lg("ny office")

#### DOCUMENT FIELDS

Field	Abbreviation	Example
<b>Court</b>	co	co(united states supreme court)
<b>Doc Type</b>	docty	docty(brief)
<b>Judge – Primary</b>	jp	jp(anderson /3 barry)>

<b>Judge – Secondary</b>	js	js(halbrooks)
<b>Jurisdiction</b>	jur	jur(federal)
<b>Litigation Doc Title</b>	docti	docti("dole food" /5 patrickson)

The court, doc type, and jurisdiction fields are phrase indexed, so you must search for the terms exactly, including punctuation and spacing. As an alternative to typing the complete exact phrase, you can use the root expander (!) at the end of the term, for example, **docty(memo!)**.

To search for a judge's name in both judge fields simultaneously, type **jp,js(judgename)**, for example, **jp,js(halbrooks)**.

Document fields may only be available for litigation documents.

#### TITLE FIELDS

Field	Abbreviation	Example
<b>Transactional Doc Title</b>	docti	docti(purchase /5 agreement)
<b>Clause Title</b>	clti	clti("partner liability")
<b>Defined Term Title</b>	dtti	dtti(seller)

Title field restrictions may only be available for transactional documents.

#### DOCUMENT ANALYSIS FIELDS

Field	Abbreviation	Example
<b>Attorney</b>	at	at(carla /3 rodriguez)
<b>Law Firm</b>	lf	lf(peterson /3 office)
<b>Governing Law</b>	gl	gl(california)
<b>Parties</b>	par	par(citran & cornell)

Document Analysis fields may only be available for transactional documents.

Depending on the data from your organization's document management system, the Governing Law field can contain different variations of a jurisdiction name, such as California, State of California, or CA. When you sort result lists by this field, variations can cause results from the same jurisdiction to be grouped separately (for example, **California** before **State of California**).

### Using Terms and Connectors

You can use connectors and special characters to change relationships between your search terms and retrieve variations of search terms.

#### CONNECTORS

Use connectors to specify the relationships that must exist between the terms in your retrieved litigation documents.

Connector	Symbol	Retrieves
<b>AND</b>	&	Both search terms in the same document: <b>narcotics &amp; warrant</b>
<b>OR</b>	(space)	Either search term or both terms: <b>car automobile</b> In West km for Transactions, a space translates to the AND connector by default.
<b>Grammatical Connectors</b>	/s	Search terms in the same sentence: <b>design /s defect</b>
	/p	Search terms in the same paragraph: <b>hearsay /p utterance</b>
	+s	The first term preceding the second within the same sentence: <b>palsgraf +s island</b>
<b>Numerical Connectors</b>	/n	Search terms within "n" terms of each other (where "n" is a number): <b>person** /3 jurisdiction</b>
	+n	The first term preceding the second within "n" terms (where "n" is a number): <b>20 +5 1080</b>
<b>Phrase</b>	" "	Search terms appearing in the same order as in the quotation marks: <b>"attractive nuisance"</b>
<b>BUT NOT</b>	%	Documents not containing the term or terms following the % symbol: <b>r.i.c.o. % puerto rico</b>

#### ROOT EXPANDER

To retrieve words with variant endings, type the root expander (!).

Type:            To retrieve:  
  
object!        *object, objected, objection, objecting*

#### UNIVERSAL CHARACTER

To represent one variable character, type the universal character (\*).

Type:            To retrieve:  
  
jur\*\*         *jury, juror* (but not *jurisdiction*)

#### AUTOMATIC PLURALS AND EQUIVALENT TERMS

By default, searches retrieve plural forms and equivalent terms. To find the exact term you specify in the search, type the # symbol in front of the term.

Type:            To retrieve:  
  
#damage       *damage* (not *damages*)  
  
#willful       *willful* (not *wilful*)

## COMPOUND WORDS

If your search term is a compound word, use its hyphenated form to retrieve all variations.

Type:            To retrieve:

good-will        *goodwill, good-will, good will*

## ABBREVIATIONS

If your search term is an abbreviation, type it with periods and without spaces to retrieve all variations.

Type:            To retrieve:

h.i.v.            *H.I.V., H. I. V., HIV, H I V*

## COMMON WORDS

These common words are not searched unless they are included in a phrase. Search for a phrase by placing it in quotation marks.

about	however	therefore
above	if	these
after	in	this
also	into	those
although	mr	through
an	now	thus
and	of	to
as	on	under
at	or	until
be	other	upon
because	out	what
before	over	when
between	since	where
but	such	whether
by	than	which
either	that	while
for	the	with
from	then	within
further	there	without
here		

# About Firm Central

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Firm Central is the only cloud-based legal practice management software that fully integrates with Thomson Reuters Westlaw and other essential business tools. Its features set it apart and provide everything you need to manage your law firm.

Firm Central comprises the following features:

**Matter management:** Find matter information quickly, and put an end to scrambling through files, documents, and contracts.

**Legal time and billing:** Cloud-based billing software is the affordable and efficient way to record your time and expenses.

**Accounting:** Streamline your law firm operations with built-in accounting software designed specifically for a law business.

**Legal calendaring:** Reduce the risk of calendaring errors, and manage matter appointments with speed and efficiency.

**Mobile access:** Get mobile access to your matter information, so you can be in the office even when you're not.

**Security:** State-of-the-art technology and cloud security standards keep your firm's information safe.

**Client portal:** Boost attorney-client communication while safeguarding sensitive data with a fully encrypted portal.

**Westlaw compatibility:** Build efficiency into your matter work with seamless integration between Firm Central and Westlaw.

**Program integrations:** Work with multiple programs from a single log-in without interruption, increasing speed and efficiency.

For more information, go to [legalsolutions.thomsonreuters.com/law-products/support/contact-us](https://legalsolutions.thomsonreuters.com/law-products/support/contact-us).

# About Draft Insights

Draft Insights alerts you to critical case history after closing Drafting Assistant. Draft Insights underlining applies to standard long form and certain short form citations. Draft Insights will not underline Ids., Supras, or Ibids. Right-click cases with orange underlining to view KeyCite status and link to Westlaw. Access System Preferences to turn Draft Insights off.

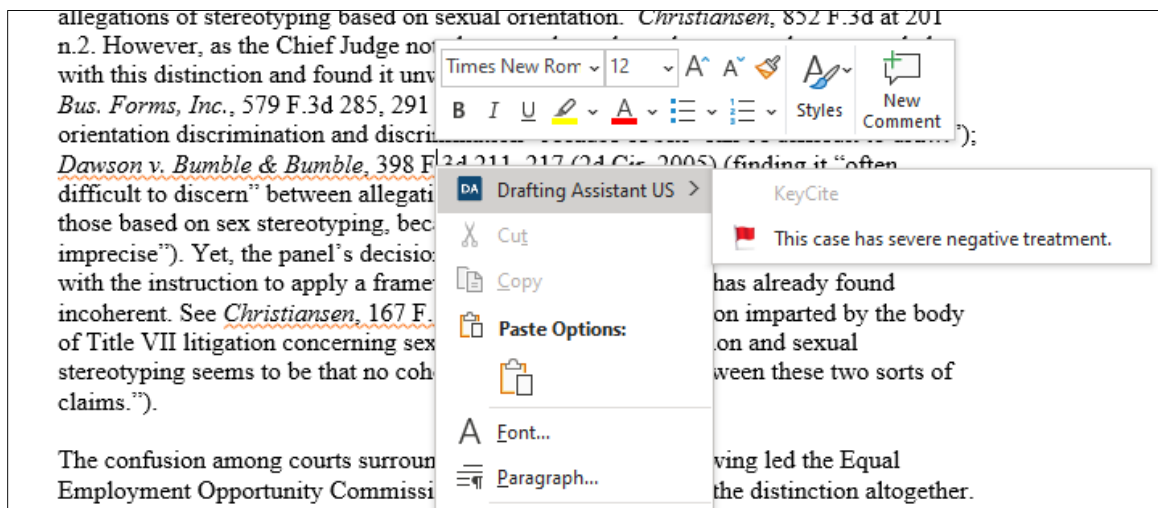
## Working with Draft Insights

View critical KeyCite flags for the citations in your document and link to the related tab on Westlaw. Draft Insights will only alert for case citations with a Red Flag, Orange Overruling Risk Icon, or a Blue Striped Flag.

Draft Insights analysis only runs when Drafting Assistant is closed to provide optimum performance. Analysis will begin after closing the Drafting Assistant side panel or upon opening a document in Word after previously signing into Drafting Assistant.

### VIEWING AND ACCESSING KEYCITE INFORMATION

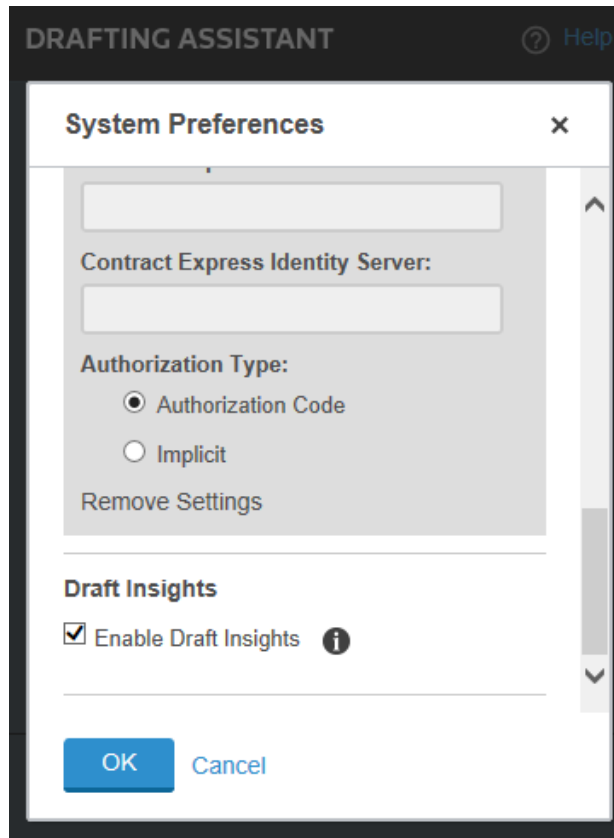
1. Right-click a case with orange Draft Insights underlining.
2. Select Drafting Assistant from the context menu and view KeyCite flag or icon.



3. Click the flag or icon to link to the Negative Treatment tab or History tab for that case on Westlaw. The Red Flag and Orange Overruling risk icon will link to the Negative Treatment tab and the Blue Striped flag will link to the History tab.

## ENABLING AND DISABLING DRAFT INSIGHTS

1. Click **System Preferences**
2. Uncheck **Enable Draft Insights** to turn Draft Insights off.



### 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 KeyCite status flag lets you know immediately the status of the case. Draft Insights only presents KeyCite information for cases with a red flag, blue striped flag, or orange Overruling Risk Icon.

#### Red Flag

A red flag warns that the case is no longer good law for at least one of the points of law it contains.

#### Red Striped Flag

A red striped flag indicates that a case is no longer good for at least one identified point of law.

#### Overruling Risk Icon

An Overruling Risk icon warns that the case relies on another case or proposition from another case that has been explicitly overruled. For example, Case A is explicitly overruled or abrogated by Case B, but Case C, which cites case A for the same proposition that was overruled is not mentioned in Case B. Case C is implicitly overruled by Case B, and thus will display the Overruling Risk warning.

#### 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).



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