

Using West km in Drafting Assistant

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For assistance using West km, call 1-888-937-8561. You can also visit our contact page at <http://legalsolutions.thomsonreuters.com/law-products/support/west-km>

For free reference materials, visit <http://legalsolutions.thomsonreuters.com/law-products/support/user-guides>

For free reference materials, visit legalsolutions.thomsonreuters.com/guides. Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

West km in Drafting Assistant

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.

- To access West km in Drafting Assistant, click the **West km** tool on the Drafting Assistant toolbar in Microsoft Word or Corel WordPerfect.
- To search West km 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).
- To view a document in a search result, click its title.
- To view a summary of a document, click **Summary** when viewing the search result or a document.

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.

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

1. Open your document in Microsoft Word or Corel WordPerfect and click the **West km** tool on the Drafting Assistant toolbar.
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.
4. Select or clear check boxes on the **Library Groups** panel to include or exclude library groups from the search.

- 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.
- Click **Search**.

The list of documents matching your search criteria display.

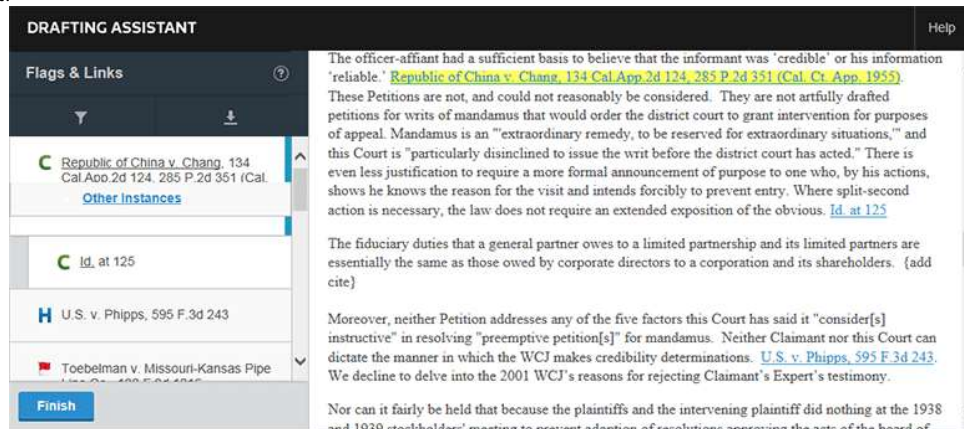
Working with Flags and Links

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

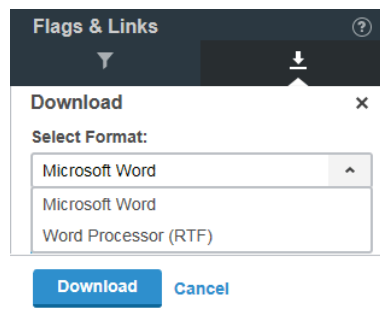
INSERTING AND UPDATING FLAGS AND LINKS

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

- Click the **Flags & Links** tool on the left side of your document. If you are accessing Drafting Assistant from Word or WordPerfect, begin by clicking the **Drafting Assistant** toolbar button.
- Select to insert **Links, Flags**, or both, then click **Insert/Update**.
- A list of KeyCite flags that have been added appear in the left pane. To quickly locate a citation in your document, select it from the list in the left pane. The document view scrolls to the location of the citation and the citation is highlighted in your document.



- 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.



- Click **Finish** to return to the Drafting Assistant list of available tools. A message displays indicating the number of citations that were processed. Click **X** to close the message.

REMOVING FLAGS AND LINKS

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

About KeyCite Status Flags

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



Red Flag

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

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



Yellow Flag

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

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



Blue Striped Flag

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



Blue H

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



Green C

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



Unverified Red U

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



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. Open your document in Microsoft Word and click the **Locate Precedent** tool on the left side of your document.
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 **Sample Agreements** or **West km** to view documents from the respective content sets.
 - 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** or **West km** document in the results list to open the document in the Locate Precedent pane.
6. Use the document and Clauses navigation at the bottom of the document to navigate to the next agreement or next clause, respectively.

