

# Using Drafting Assistant

## Litigation Version

Drafting Assistant–Litigation provides easy access to information, research, authority, and tools to help you draft legal documents. It works inside the Westlaw® Solutions framework and is integrated with Microsoft® Word® and Corel® WordPerfect®.

With Drafting Assistant–Litigation, you can do the following:

- Manage and organize documents and selected text in personal folders.
- Retrieve templates and sample documents to help you draft documents quickly.
- Access WestlawNext® or Westlaw Classic to run searches and add research directly to your document.
- Find authority for language in your draft document.
- Validate the format of your document in accordance with your jurisdiction’s rules.
- Create a self-contained package of your document and all the important legal sources referenced in your document.
- View and use content that you have added to Case Notebook.
- Search your organization’s West km content and use it as you draft new legal documents.
- Check citations so you know with certainty that your document cites good law, insert links for citations in your document, and find local documents.
- Format legal citations in your document and build and insert a table of authorities.

This quick reference guide describes generally how to use Drafting Assistant–Litigation. For detailed information, download a copy of the *Drafting Assistant–Litigation User Guide* at [legalsolutions.thomsonreuters.com/law-products/p/990001214](http://legalsolutions.thomsonreuters.com/law-products/p/990001214).

For assistance using Drafting Assistant, call **1-800-Westlaw** (1-800-937-8529) or email **west.support@thomsonreuters.com**.

For free reference materials, visit **legalsolutions.thomsonreuters.com/guides**.

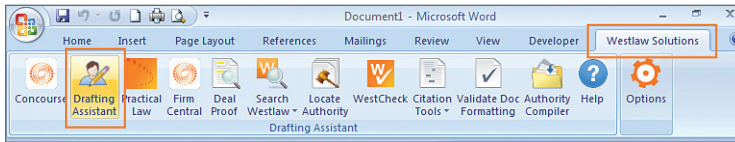
### Contents

Getting Started . . . . .	2
Using Templates and Sample Documents . . . . .	3
Using Personal Folders . . . . .	3
Importing Documents and Selected Text . . . . .	3
Searching Westlaw . . . . .	4
Locating Authority . . . . .	4
Validating Document Formats . . . . .	5
Compiling Authority . . . . .	6
Integrating with Case Notebook . . . . .	7
Searching West km Content . . . . .	7
Using Flags & Links Features . . . . .	8
Using TOA & Cite Formatting Features . . . . .	9
Creating a Report . . . . .	10

## Getting Started

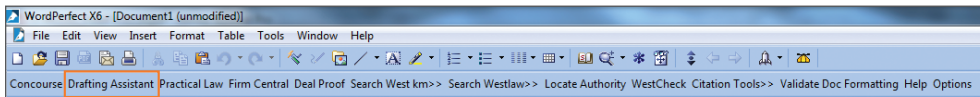
To begin using Drafting Assistant–Litigation,

1. Open a new document or your draft document in Microsoft Word or Corel WordPerfect.
2. Do one of the following:
  - Click the **Westlaw Solutions** tab on the word processor ribbon, and then click **Drafting Assistant** (Word 2007 or later).



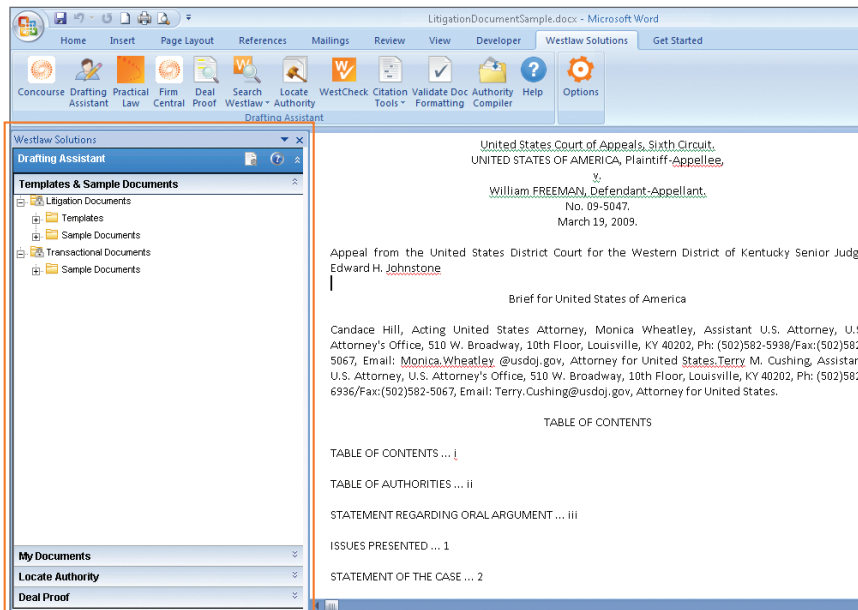
Drafting Assistant on the Microsoft Word ribbon

- Click **Drafting Assistant** on the Thomson toolbar (Word 2003 or WordPerfect).



Drafting Assistant on the Corel WordPerfect ribbon

Drafting Assistant is displayed in the left pane alongside your document.



Drafting Assistant in Microsoft Word

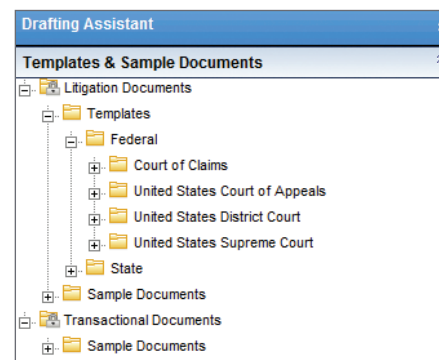
Some features (e.g., Search Westlaw, Validate Doc Formatting) are available directly from the ribbon or toolbar. To access them, click the appropriate item or button.

## Using Templates and Sample Documents

If you are starting a new document, you can use the Templates and Sample Documents feature to help you draft documents quickly.

To access sample documents,

1. In the left pane, click the **Templates & Sample Documents** panel to expand it.
2. If the Westlaw Sign-On dialog box is displayed, type your OnePass username and password in the text boxes and click **Sign On**.
3. Under **Litigation Documents** in the left pane, click the plus symbol (+) next to **Templates** or next to **Sample Documents**, and then use the plus (+) and minus (-) symbols to browse the folders.
4. To display a sample document as a new document, double-click it.



Templates & Sample Documents panel

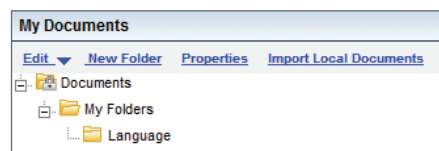
## Using Personal Folders

You can use personal folders to help you organize and manage documents and selected text.

To access personal folders, click the **My Documents** panel in the left pane, and then click the plus symbol (+) next to **My Folders** under **Documents**. By default, the **Language** folder is provided for you.

To add a folder, click **New Folder** under **My Documents**. In the **Create Folder** dialog box, type a name in the **Name** box, click **My Folder**, and then click **OK**.

To move, cut, copy, delete, or rename a folder or create a new folder under an existing folder, click the folder, and then click **Edit** and click the appropriate option on the menu.

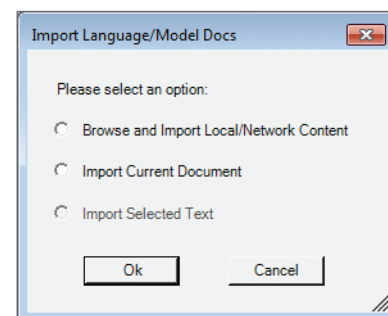


My Documents panel

## Importing Documents and Selected Text

To import documents and selected text into personal folders,

1. Click **Import Local Documents** under **My Documents**.
2. In the **Import Language/Model Docs** dialog box, click an option to import a document from your computer or network, the draft document, or selected text, and then click **OK**.
3. If you are importing a document from your computer or network, select your document and click **Open**.
4. Select the folder into which you want to import the document or text, and click **OK**.



Import Language/Model Docs dialog box

## Searching Westlaw

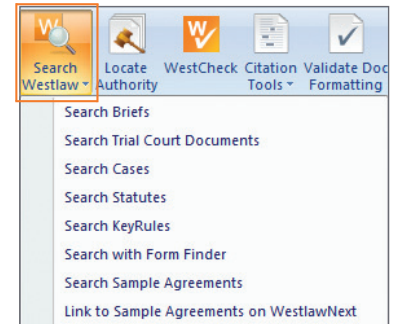
The Search Westlaw feature allows you to access WestlawNext or Westlaw Classic directly from Drafting Assistant and then add information from your search result to your draft document. If you have a subscription to WestlawNext, your search is automatically run in WestlawNext.

To display a list of search categories, click **Search Westlaw** on the ribbon or toolbar.

For example, to retrieve a case, click **Search Cases**. At the Westlaw Sign-On dialog box, type your OnePass username and password and client identifier in the appropriate boxes and click **Sign On**. Type a Terms and Connectors query or terms describing your issue in the text box, change the jurisdiction, if desired, and then click the **Search** icon (🔍). The result list is displayed in the viewer.

While viewing a search result, you can

- display the full text of a document in the viewer by clicking its link
- select text in the viewer and click **Send** to insert the text with the citation in your draft document
- select text in the viewer and drag it to your draft document



Search Westlaw categories

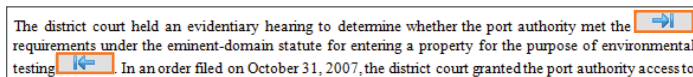
## Locating Authority

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 WestlawNext or Westlaw Classic for cases that best fit the text.

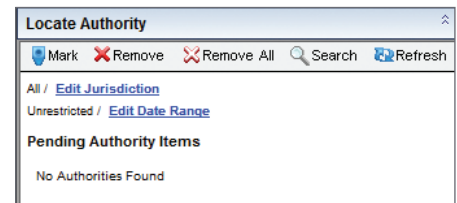
To locate authority,

1. In the left pane, click the **Locate Authority** panel to expand it.
2. Select the text in the draft document for which you want to locate an authority, and then click **Mark**.

A mark is placed at the beginning and at the end of the text and the text is displayed under Pending Authority Items in the left pane.



Marked text



Locate Authority panel

3. Change the jurisdiction and date range, if desired.
4. Under Pending Authority Items, select the text for which you want to locate the authority and click **Search**. The result list is displayed in the viewer.

**Note** If you did not restrict the search by jurisdiction or by date, you will be prompted to sign on to WestlawNext or Westlaw Classic before the result list is displayed.

5. Select the check box next to the case with the citation you want to insert in the draft 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 is displayed next to the language in the left pane.

**Note** Click **See how others have cited the case**, if available, to view how other cases have cited your case.

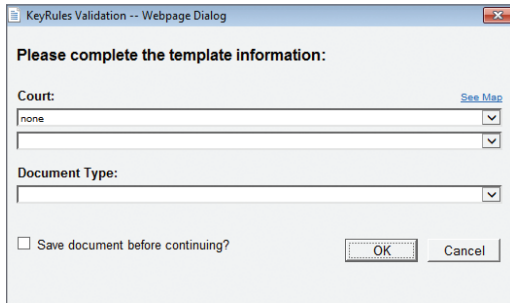
6. After you finish locating the authority for the selected text items, click **Refresh** to remove those items.

## Validating Document Formats

Once you finish drafting your document, you can use the Validate Formatting feature to check whether the document is formatted in accordance with your jurisdiction's court rules.

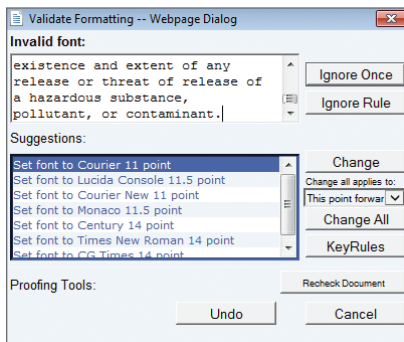
To validate the format of a document,

1. Click **Validate Doc Formatting** on the ribbon or toolbar. The KeyRules Validation dialog box is displayed.



KeyRule Validation dialog box

2. In the lists, click the appropriate court and document type and then click **OK**. The Validate Formatting dialog box is displayed with the first correctable rule listed at the top.



Validate Formatting dialog box

3. Ignore the rule or change the document for each correctable rule.
4. After you finish checking the formatting of the document, the Drafting Assistant–Validate Formatting dialog box is displayed with a list of detectable and informational rules, if available. To print the list of detectable and informational rules, click **Print**.

## Compiling Authority

The Authority Compiler feature creates a self-contained package of your document and all the important legal sources referenced in it.

**Note** Authority Compiler works with Microsoft Word and requires a OnePass account for WestlawNext.

To compile authority for your document,

1. Click **Authority Compiler** on the ribbon or toolbar. The Getting Started window is displayed.
2. Under Profile Settings, select the profile you want to use for compiling authority. To create a profile, click **Create New Profile**, enter the criteria you want for the profile, and click **Save Profile**.

In a profile, you can designate or remove a jurisdiction, define the scope of coverage, and set your preferences for appended authorities and page numbering.

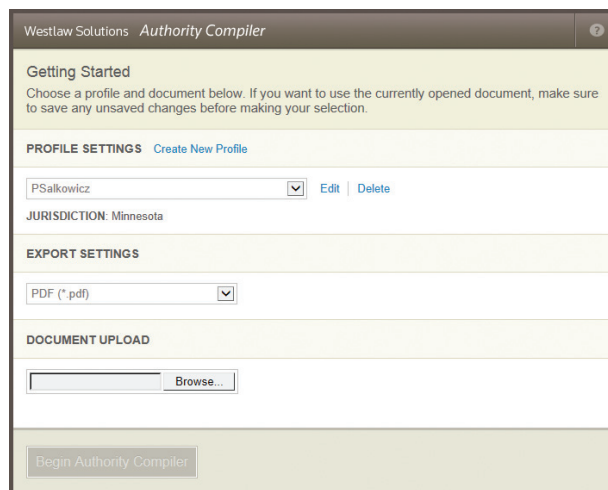
3. Under Export Settings, select the delivery format (e.g., Word Document, PDF) that you want for your compiled authority.
4. Under Document Upload, click **Browse** and select the document for which you want to compile authority.

You can upload a document in .doc, .docx, .rtf, or .txt format. For best performance, upload a document on your local computer, not from a network.

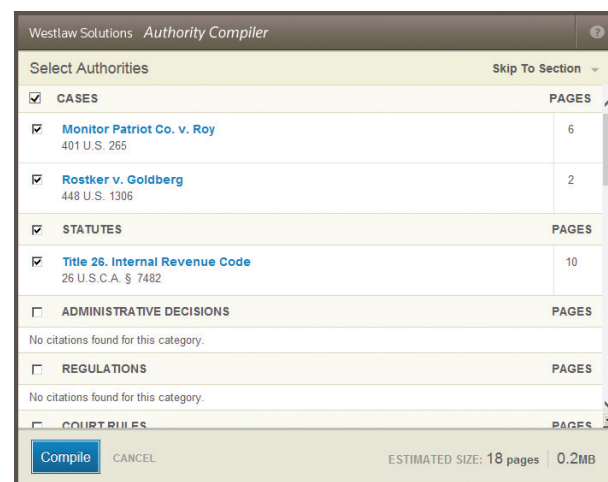
**Note** If you already have a document open in Word, you still must select a document to upload.

5. Click **Begin Authority Compiler**. The Select Authorities window is displayed and lists all authorities found in your document according to your profile settings.
6. If desired, further customize your options for appending authorities and override the profile settings.  
For example, you can select which cited authorities to append, link to documents on WestlawNext to view the authorities, and view the listed authorities by category.
7. Click **Compile**.
8. When the compilation is complete, click **Download** and then choose whether to save or open the compiled document with the authorities appended.

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



Authority Compiler Getting Started window

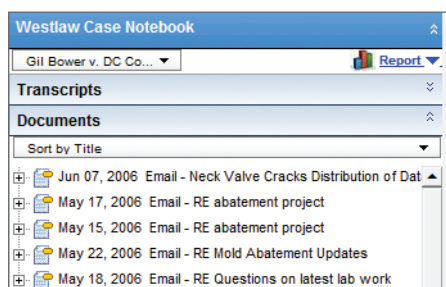


Authority Compiler Select Authorities window

## Integrating with Case Notebook

The integration of Case Notebook functions and output with Drafting Assistant allows you to view and work with transcripts, documents, pleadings, and research documents, without leaving the word processor. Also, when you import this content into Case Notebook, it is automatically displayed in the appropriate categories in Drafting Assistant.

For example, to view a document that you imported into Case Notebook, click the **Case Notebook** panel in the left pane, click **Select Matter**, and click a Case Notebook case in the list. Click the **Documents** panel to display a list of documents in the case, and then double-click the document you want to view.



### Case Notebook documents

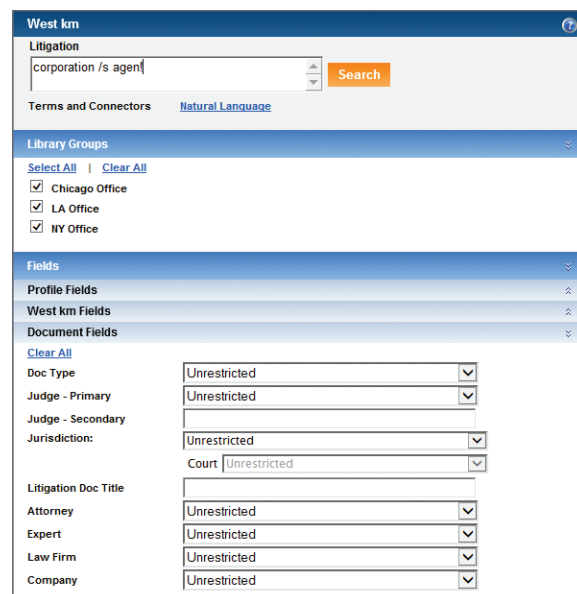
You can work with the text and citations of image or PDF files that Case Notebook has converted to text-searchable formats. View the document in Drafting Assistant, select a portion of images or text, if desired, and then click a Send option in the Westlaw Solutions Viewer.

## Searching West km Content

In Drafting Assistant, you can search your organization's West km content—such as briefs, pleadings, and memos from your litigation collection—and then use that content as you draft new legal documents.

For example, to search for West km litigation documents,

1. Click **Search West km** on the ribbon or toolbar and then click **Litigation**.
2. Click the type of search you want to perform and then type either a Terms and Connectors query or a Natural Language description in the text box.
3. To restrict your search to particular groups of documents, select or clear check boxes on the Library Groups panel to include or exclude library groups from the search.
4. If you are using a Terms and Connectors query, if desired, type or select information in one or more fields on the Fields panel to add the field criteria to the search.
5. Click **Search**.

The screenshot shows the 'West km' search interface. At the top, there's a search box with the text 'corporation /s agen' and a 'Search' button. Below the search box are two tabs: 'Terms and Connectors' and 'Natural Language'. The 'Library Groups' section has three checkboxes: 'Chicago Office', 'LA Office', and 'NY Office', all of which are checked. The 'Fields' section is expanded, showing a list of fields with dropdown menus for each. The fields and their current values are: 'Doc Type' (Unrestricted), 'Judge - Primary' (Unrestricted), 'Jurisdiction' (Unrestricted), 'Court' (Unrestricted), 'Litigation Doc Title' (empty), 'Attorney' (Unrestricted), 'Expert' (Unrestricted), 'Law Firm' (Unrestricted), and 'Company' (Unrestricted).

West km litigation search template

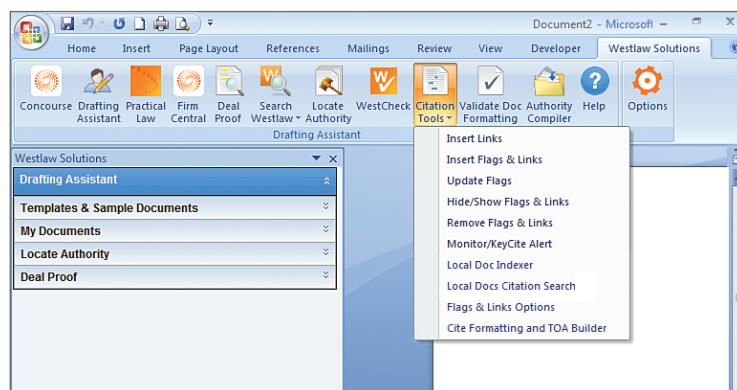
The documents matching your search criteria are displayed. To view a document in a search result, click its title. To view a summary of a document, click **Summary** when viewing the search result or a document.

## Using Flags & Links Features

Flags & Links features allow you to instantly view the status of cited cases, statutes, rules, regulations, and administrative decisions; link to the full-text documents on WestlawNext or Westlaw Classic; and monitor the status of citations within your documents.

In addition, the Local Documents feature retrieves all of your organization's internal documents that contain a particular citation (West km integration also provides this capability).



To access a Flags & Links feature, click **Citation Tools** on the ribbon or toolbar and then click a command.



Accessing Flags & Links features

## WORKING WITH FLAGS AND LINKS

Using the Flags and Links commands, you can instantly insert KeyCite status flags and create links from the citations in your document to the full-text documents on WestlawNext or Westlaw Classic. These flags allow you to easily evaluate the validity of a case, statute, regulation, or administrative decision.

 [Serapion v. Martinez, 119 F.3d 982 \(1st Cir. 1997\)](#)

Click the flag preceding a citation to access KeyCite information on WestlawNext or Westlaw Classic.

Click the **km** icon after a citation to access citing documents at your organization (available with West km integration).

Click the link to access the document on WestlawNext or Westlaw Classic.

## Inserting Links

While viewing a legal document in Microsoft Word or Corel WordPerfect, click the **Insert Links** command. Hypertext links are added to the citations in your document. Click a link to access the full text document on WestlawNext or Westlaw Classic.

## Inserting Flags and Links

While viewing a legal document in Word or WordPerfect, click the **Insert Flags & Links** command. KeyCite flags and links are added to the citations in your document. Click a KeyCite flag or link to access the KeyCite result or full-text document on WestlawNext or Westlaw Classic.

## Updating Flags

Click the **Update Flags** command to see whether there has been a change in the status of the documents cited in your document. If the status of a cited document has changed, its citation will be highlighted in yellow.

## Hiding/Showing Flags and Links

Click the **Hide/Show Flags & Links** command to toggle between hiding and showing the KeyCite status flags and links in your document.

## Removing Flags and Links

Click the **Remove Flags & Links** command to delete all KeyCite status flags and links in your document.

## Using TOA & Cite Formatting Features

TOA & Cite Formatting features checks citations in your legal document and suggest the correct citation format according to *The Bluebook*, ALWD, or state rules. TOA & Cite Formatting also inserts a table of authorities in your document.

### CHECKING CITATION FORMATS

1. Click **Citation Tools** on the ribbon or toolbar and then click **TOA & Cite Formatting**.
2. At the Westlaw Sign-On dialog box, type your OnePass username and password and a client identifier in the appropriate text boxes and click **Sign On**. The TOA & Cite Formatting page is displayed in the left pane alongside your document.
3. Click the appropriate markup removal options to remove from your document all existing TOA markup, plus links markup inserted by a Drafting Assistant product (e.g., BriefTools).
4. Your current option set is listed under Set Options. To change your settings, click **Change current options**. For details, see "Setting TOA & Cite Formatting Options" on page 12.
5. Under Cite Recognition, click your citation recognition preference. To send your entire document to a Thomson Reuters server for processing, click **Submit Entire Document**. To submit only the citations from your document, click **Submit Citations Only**.
6. During processing, changes will be made to your document. To save your document before proceeding, click **Save now and proceed** under Save Document. Or, click **Proceed without saving**.
7. Select the **Citation Format Advisor** check box. To also create a table of authorities, select the **Table of Authorities Builder** check box (for details, see "Building a Table of Authorities" on page 12).
8. Click **Process Request**. The first citation that is recognized is highlighted in the document and displayed in the Citation box in the left pane.
9. If the citation is not correctly displayed in the Citation text box, select the desired text in your document and click **Accept Change**.
10. The suggested citation format is displayed in the Suggestion box. To accept the suggestion, click **Accept**. If there are multiple suggestions, first click the desired suggestion, and then click **Accept**. Or, click **Ignore Suggestion** to ignore the suggestion and move on to the next citation and suggestion.
11. To quit or to check a new document, click **Cancel**.

### TOA & Cite Formatting

**1 Set Options:**  
Current Option Set: Default  
[Change current options](#)

**2 Cite Recognition:**  
 Submit Entire Document  
 Submit Citations Only

**3 Save Document:**  
Cite Advisor will make changes to your document.  
Would you like to save it before proceeding?  
 Save now and proceed  
 Proceed without saving

**4 Select Services:**  
 Citation Format Advisor  
 Skip short citation forms  
 Table of Authorities Builder

**5 Existing Markup (Optional):**  
[Remove CiteAdvisor TOA Markup](#)  
[Remove All TOA Markup](#)  
[Remove All West Links](#)

For assistance, please call 1-800-REF-ATTY (1-800-733-2889)

TOA & Cite Formatting page

## BUILDING A TABLE OF AUTHORITIES

1. Complete steps 1–6 under “Checking Citation Formats” on page 11.
2. Select the **Table of Authorities Builder** check box.
3. Click **Process Request**. The Inserting your TOA page is displayed in the left frame.
4. Click in your document where you want the tables of authorities to be inserted.
5. Click **Build TOA**.

The TOA is inserted in your document at the cursor location.

## SETTING TOA & CITE FORMATTING OPTIONS

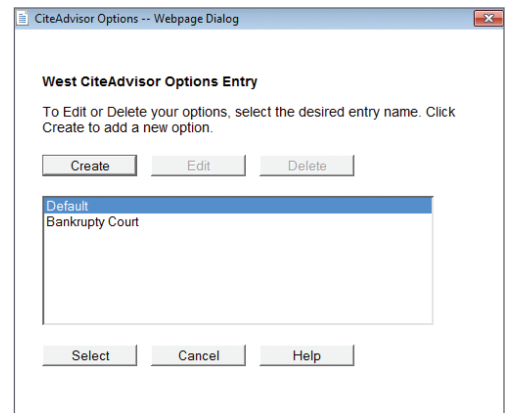
To set options for citation formats and tables of authorities, click **Change current options** at the TOA & Cite Formatting page. The Options Entry dialog box is displayed.

To select an existing option set, click the option set in the list and then click **Select**.

To create a new option set,

1. Click **Create**. The Options Details dialog box is displayed.
2. In the **Name** box, type a name for the option settings, e.g., **Bankruptcy Court**.
3. In the **Default Jurisdiction** list, click a default jurisdiction to help identify citations.
4. Select the check box next to each type of coverage you want: **Caselaw**, **Statutes**, **Administrative Decisions**, **Regulations**, **Court Rules**, and **Law Reviews and Bar Journals**.
5. Set the options under Citation Format Advisor and Table of Authorities Builder. For example,
  - For citation formats, you can designate the desired citation rules and style, formatting preferences, how to handle parallel citations, and the publication to use for statutes.
  - For tables of authorities, you can designate formatting preferences, the desired tab leader, and the font style for headings.
6. Click **Save**.

To edit or delete an option set, in the Options Entry dialog box, click the option set in the list and then click **Edit** or **Delete**.



Options Entry dialog box

## Creating a Report

Using WestCheck®, you can create a summary report for each case, statute, regulation, rule, and administrative decision cited in your document. The online report includes the KeyCite flags and links to the full-text documents on Westlaw, the KeyCite history and citing references, and a navigational index.

For more information on creating a report in WestCheck, see the *WestCheck User Guide* at [legalsolutions.thomsonreuters.com/law-products/p/990001166](https://legalsolutions.thomsonreuters.com/law-products/p/990001166).

Published 6/14. L-372217.

© 2014 Thomson Reuters. All rights reserved.

The trademarks used herein are the trademarks of their respective owners.  
West trademarks are owned by West Publishing Corporation.

