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WEST CITEADVISOR USER GUIDE

SOFTWARE VERSION

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About This Guide

Thomson Reuters continues to develop new features and improve existing features for its products. Because of these improvements and the evolving nature of Internet technology, there may be recent changes to the product interface and functionality that are not reflected in this documentation.

Information in this guide is current through June 2012.

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1 Introduction to West CiteAdvisor

What Is West CiteAdvisor?

West CiteAdvisor checks citations in legal documents and suggests the correct citation format. West CiteAdvisor

- identifies legal citations (cases, statutes, court rules, regulations, constitutions, administrative decisions, and journal and law review articles) in your Microsoft Word or Corel WordPerfect document.
- suggests citations from *The Bluebook: A Uniform System of Citation*, the *ALWD Citation Manual*, or a citation style specific to a specific state.
- gives you complete control over which citation changes to make—no changes are made without your approval.
- applies correct formatting directly to your document.
- creates a properly formatted table of authorities (TOA) in your document.

The software version of West CiteAdvisor includes

- compatibility with document management systems (DMS).
- compatibility with Microsoft Word and Corel WordPerfect.
- local citation checking (you can send only the citations from your document, rather than the entire document).
- the Westlaw Solutions Framework interface, which makes using, managing, and accessing Westlaw Solutions products easier.

Benefits of West CiteAdvisor

The TOA and cite-formatting features of West CiteAdvisor give you

- letter-perfect accuracy. Your citation formats will meet the standards of the appropriate court, publisher, or law professor.
- effectiveness. Quickly and almost effortlessly, it builds and inserts a table of authorities.
- efficiency. You can complete document editing and proofreading in a fraction of the time ordinarily required.
- flexibility and full control. Select the formatting rules you want to use: *The Bluebook*, *ALWD Citation Manual*, your jurisdiction's rules, or your personal preferences; West CiteAdvisor scans your document and suggests formatting changes you can accept or reject.

How to Get West CiteAdvisor

Download West CiteAdvisor at store.westlaw.com/software/cite-advisor. West CiteAdvisor, the software version, installs into the Westlaw Solutions Framework, in Microsoft Word or Corel WordPerfect.

How to Access TOA & Cite Formatting Commands

To access TOA and cite-formatting commands in West CiteAdvisor, do one of the following while viewing your legal document in Microsoft Word or Corel WordPerfect:

- From the Westlaw Solutions tab on the word processor ribbon, click **TOA & Cite Formatting**.
- Click the **TOA & Cite Formatting** command button on the word processor toolbar.
- Click **Select Product** from the Westlaw Solutions window and then click **TOA & Cite Formatting**.

Note Not all access methods are available on all systems.

2 Using TOA & Cite Formatting

Signing On

To sign on and access TOA and cite-formatting features, complete these steps:

1. Open your legal document in Word or WordPerfect.
2. Access the **TOA & Cite Formatting** command. The Sign On with OnePass dialog box is displayed (Figure 2-1).

The image shows a 'Sign On with OnePass' dialog box. It has a blue header with the title and a link to 'Switch to Westlaw Password Sign On'. The main area is white with a blue border. On the left, there are three text input fields for 'OnePass Username:', 'OnePass Password:', and 'Client ID'. Below these are three checkboxes: 'Remember Username', 'Remember Username & Password', and 'Remember Client ID'. A 'Sign On' button is at the bottom left. On the right, there is a 'Help' section with links for 'Forgot Username or Password?', 'Register my Westlaw Password', 'Edit or Update OnePass Account', 'Do I have a OnePass Account?', and 'What is OnePass?'. Below that is a 'Do you have an account?' section with links for 'Westlaw by Credit Card' and 'Technical Support' (1-800-WESTLAW/1-800-937-8529).

Figure 2-1. Sign On with OnePass dialog box

3. Type your OnePass username and password and a client identifier in the appropriate text boxes.
4. Click **Sign On**. The TOA & Cite Formatting home page is displayed in the left frame (Figure 2-2).

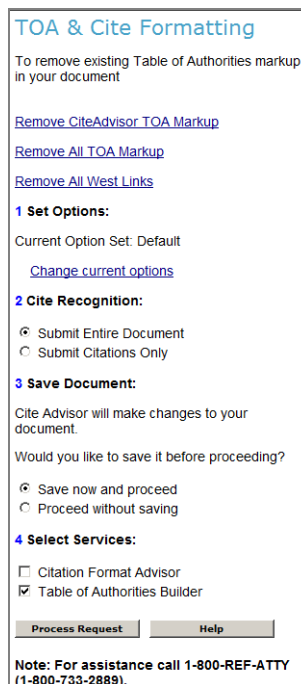
The image shows the 'TOA & Cite Formatting' home page. It has a blue header with the title. Below the header, there is a section for removing existing Table of Authorities markup, with links for 'Remove CiteAdvisor TOA Markup', 'Remove All TOA Markup', and 'Remove All West Links'. There are four numbered sections: '1 Set Options:' with a link to 'Change current options'; '2 Cite Recognition:' with radio buttons for 'Submit Entire Document' and 'Submit Citations Only'; '3 Save Document:' with radio buttons for 'Save now and proceed' and 'Proceed without saving'; and '4 Select Services:' with checkboxes for 'Citation Format Advisor' and 'Table of Authorities Builder'. At the bottom, there are 'Process Request' and 'Help' buttons, and a note: 'Note: For assistance call 1-800-REF-ATTY (1-800-733-2889)'.

Figure 2-2. TOA & Cite Formatting home page

Checking Citation Formats

To check the citation formats in your legal document, complete these steps:

1. Open TOA & Cite Formatting and sign on according to the instructions under "Signing On" on page 2.
2. On the TOA & Cite Formatting home page, your current option set is listed under Set Options. To change your options, click **Change current options**. For more information, see "Setting TOA & Cite Formatting Options" on page 5.
3. Under Cite Recognition, click your citation recognition preference. Click **Submit Entire Document** to send your entire document to a Thomson Reuters server for processing, or click **Submit Citations Only** to submit only the citations from your document.
4. 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**.
5. 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 4).

Note It is considered best practice to use the Citation Format Advisor and the Table of Authorities Builder together.

6. Click **Process Request**. The first citation that is recognized is highlighted in the document and displayed in the Citation box in the left frame (Figure 2-3).

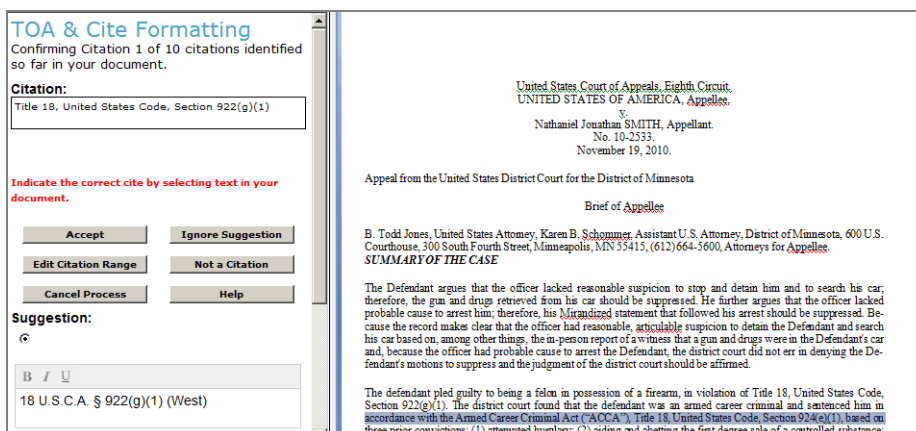


Figure 2-3. Sample suggestion page

7. If the citation is not correctly displayed in the Citation box, click **Edit Citation Range** to make corrections to the boundaries of the citation. Select the desired text in your document and click **Accept Change**.
8. 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, then click **Accept**. Or, click **Ignore Suggestion** to ignore the suggestion and move to the next citation and suggestion. If the citation is not valid, click **Not a Citation** to move to the next citation and suggestion. Selecting Not a Citation will ensure that the citation is not included in the table of authorities.

Notes

- You cannot edit a suggestion in the Suggestion box. You can, however, edit your document while processing suggestions, taking what you like from a suggestion and ignoring what you don't like. After editing your document, click **Ignore Suggestion** to ensure that the citation will be included in the table of authorities.
 - The reporter citation to very recent cases may be unofficial and could change.
9. Click **Cancel Process** to quit or to check a new document.

Notes

- Billing starts at the first suggestion.
- Statute publication dates included in your document will be added to citation suggestions. If there is no date in the statute citation in your document, no date will be added to the suggestion.
- If you have included a pinpoint page number in the text of your document, it will be included in the suggestion. However, pinpoint page numbers won't be generated.

Building a Table of Authorities

The Table of Authorities Builder inserts a list of references in your legal document where your cursor is positioned (or where you have selected text).

Note Before you build a table of authorities, it is recommended that you remove from your document all existing TOA markup, plus links markup inserted by a Westlaw Solutions product (e.g., West BriefTools). The TOA & Cite Formatting home page provides markup removal options to help you with this task.

To generate a table of authorities in your legal document, complete these steps:

1. Open TOA & Cite Formatting and sign on according to the instructions under "Signing On" on page 2.
2. At the TOA & Cite Formatting home page, click the appropriate markup removal options (Figure 2-4) to help you remove from your document all existing TOA markup, plus links markup inserted by a Westlaw Solutions product (e.g., West BriefTools):
 - Click **Remove CiteAdvisor TOA Markup** to remove TOA markup inserted by this Westlaw Solutions product.
 - Click **Remove All TOA Markup** to remove all TOA markup in the word processor's language. (This includes Westlaw Solutions TOA markup, but may not include other third-party markup.)
 - Click **Remove all West Links** to remove links markup inserted by a Westlaw Solutions product.

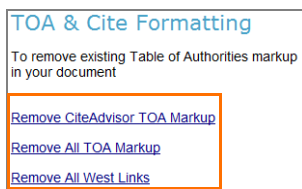


Figure 2-4. Markup removal options

3. Your current option set is listed under Set Options. To change your options, click **Change current options**. For more information, see "Setting TOA & Cite Formatting Options" on page 5.
4. 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**.
5. Select the **Table of Authorities Builder** check box. To also check citation formats, select the **Citation Format Advisor** check box (for details, see "Checking Citation Formats" on page 3).

Note It is considered best practice to use the Citation Format Advisor and the Table of Authorities Builder together.

6. Click **Process Request**. The Inserting Your TOA page is displayed in the left frame (Figure 2-5).

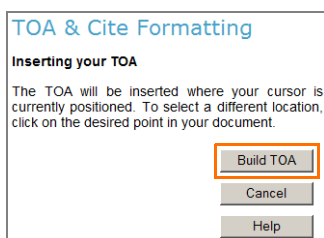


Figure 2-5. Inserting Your TOA page

7. Click in your document where you want the tables of authorities to be inserted.
8. Click **Build TOA**.

The table of authorities is inserted in your document at your cursor location, and the sign-on page is displayed in the left frame. The table of authorities includes the following headings as needed: Cases, Federal Cases, State Cases, Statutes, Federal Statutes, State Statutes, Rules, Federal Rules, State Rules, Regulations, Federal Regulations, State Regulations, and Other Authorities.

Note Billing starts after you click **Build TOA**.

To edit the table of authorities in Word, select it in the document, then press **CTRL+SHIFT+F9**.

Setting TOA & Cite Formatting Options

WORKING WITH OPTION SETS

Creating a New Option Set

1. To create a new option set, e.g., Bankruptcy Court, click **Change current options** at the TOA & Cite Formatting home page. The Options Entry dialog box is displayed (Figure 2-6).

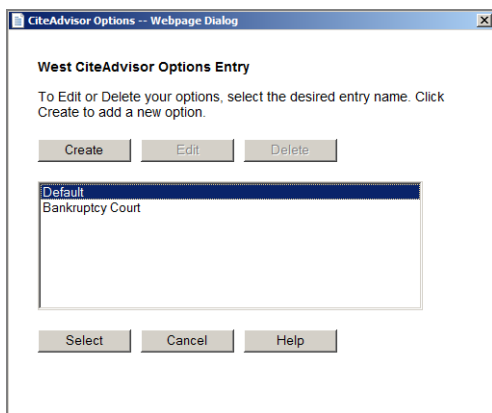


Figure 2-6. Options Entry dialog box

2. Click **Create**. The Options Details dialog box is displayed (Figure 2-7).

Figure 2-7. Options Details dialog box

3. In the **Name** text box, type a name for the option settings, e.g., **Bankruptcy Court**.
4. From the **Default Jurisdiction** list, select a default jurisdiction to help identify citations. A default jurisdiction is used to identify citations that are missing jurisdictional information or that contain publications valid in multiple jurisdictions.
5. Select the check box next to each type of coverage you want, e.g., **Caselaw**, **Statutes**, **Administrative Decisions**, **Regulations**, **Court Rules**, and **Law Reviews and Bar Journals**.
6. Set the options under Citation Format Advisor and Table of Authorities Builder. For more information, see the “Citation Format Advisor Options” and “Table of Authorities Builder Options” subsections below.
7. Click **Save**.

Editing an Option Set

To edit an option set, complete these steps:

1. In the Options Entry dialog box (Figure 2-6), click the option set in the list and then click **Edit**. The Options Details page is displayed.
2. Make your changes and then click **Save**.

Deleting an Option Set

To delete an option set, click it in the list and then click **Delete**.

CITATION FORMAT ADVISOR OPTIONS

Figure 2-8 shows the available options for the Citation Format Advisor on the Options Details page.

The screenshot shows a panel titled "Citation Format Advisor" with the following settings:

- Rules for citations: Bluebook
- Citation Styles: Legal Briefs
- Formatting Preferences:
 - Underline Title
 - Italicize Title
 - Include Subsequent History
- Parallel Citations:
 - Allow West CiteAdvisor to suggest which citations to include
 - Include only one citation per authority cited
 - Cite to the official reporter if possible
 - Cite to West's National Reporter system if possible
 - Include citations to all available reporters
- Statutes:
 - Use the official statute publication (e.g., U.S.C.)
 - Use the publication validated by West CiteAdvisor

Note that for some cites, the statute may not yet be published in the official source.

Figure 2-8. Citation Format Advisor options

1. Select the desired citation rules from the **Rules for citations** list, e.g., **Bluebook**.
2. Select the desired citation style from the **Citation Styles** list: **Legal Briefs** or **Law Reviews**.
3. Under **Formatting Preferences**, select one or more of the following options: **Underline Title**, **Italicize Title**, and **Include Subsequent History**.
4. Under **Parallel Citations**, click one of the following:
 - **Allow TOA & Cite Formatting to suggest which citations to include.**
 - **Include only one citation per authority cited** and then click either **Cite to the official reporter if possible** or **Cite to West's National Reporter system if possible**.
 - **Include citations to all available reporters.**
5. Under **Statutes**, click one of the following:
 - **Use the official statute publication**
 - **Use the publication validated by West CiteAdvisor**
6. Click **Save**.

TABLE OF AUTHORITIES BUILDER OPTIONS

Figure 2-9 shows the available options for the Table of Authorities Builder on the Options Details page.

The screenshot shows a panel titled "Table of Authorities Builder" with the following settings:

- Formatting Preferences:
 - Underline Title
 - Italicize Title
 - Case name on Separate Line
 - Include Subsequent History from Text
 - Use Passim for Frequently Cited Sources
 - Combine Federal and State Categories
 - Underline TOA Headings
- Tab Leader: [..]
- Heading Font Style: Regular

Figure 2-9. Table of Authorities Builder options

1. Under Formatting Preferences, select one or more of the following:
 - **Underline Title** to underline the title in the table of authorities.
 - **Italicize Title** to italicize the title in the table of authorities.
 - **Case Name on Separate Line** to print each case name on a separate line.
 - **Include Subsequent History from Text** to include history in citations in the table of authorities.
 - **Use Passim for Frequently Cited Sources** to use passim rather than citing specific pages.
 - **Combine Federal and State Categories** to combine federal and state citations in each table of authorities category. (For example, if this option is selected, federal and state cases will be listed together under Cases. If this option is not selected, federal cases will be listed first under Federal Cases, and state cases will be listed next under State Cases.)
 - **Underline TOA Headings** to underline the headings in the table of authorities.
2. From the **Tab Leader** list, select the desired tab leader.
3. From the **Heading Font Style** list, select the desired font style for headings: **Regular**, **Italic**, or **Bold**.
4. Click **Save**.

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