

Using West BriefTools 2.3

With Local Documents

BriefTools is a legal research product from West that allows you to instantly view the status of cited cases, statutes, rules, regulations, and administrative decisions; link to the full-text documents on Westlaw®; and monitor the status of citations within your documents. The Local Documents feature in BriefTools retrieves all of your organization's internal documents that contain a particular citation.

BriefTools 2.3, the latest version, installs into the West Solutions Framework, in Microsoft® Word or Corel® WordPerfect. Download the latest version of BriefTools at <http://west.thomson.com/software/brieftools/default.aspx>.

For assistance using BriefTools, call **1-800-WESTLAW** (1-800-937-8529).

For free reference materials, visit west.thomson.com/westlaw/guides.

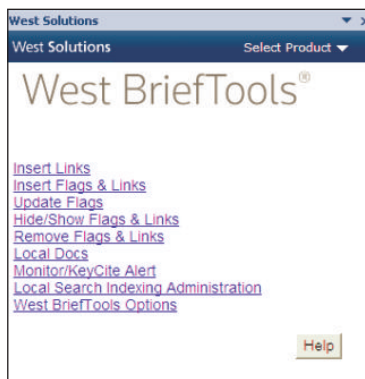


Figure 1. BriefTools home page

Getting Started

Open your legal document in Word or WordPerfect and then choose **West BriefTools** from the West Solutions *Select Product* drop-down list.

Interactive Citation-Checking Features

INSERTING LINKS

While viewing a document in Word or WordPerfect, click **Insert Links** on the West BriefTools home page in the left frame or click the **Insert Links** button on the toolbar. Links are added to the citations in your document. Click a link to display the full-text document on Westlaw.

INSERTING FLAGS AND LINKS

While viewing a document in Word or WordPerfect, click **Insert Flags & Links** on the West BriefTools home page or click the **Insert Flags & Links** button on the toolbar. KeyCite® flags and links are added to the citations in your document. Click a KeyCite flag or link to display the KeyCite result or full-text document on Westlaw.

UPDATING FLAGS

Click **Update Flags** on the West BriefTools home page or click the **Update Flags** button on the toolbar to see whether the status of the documents cited in your document has changed. If the status of a cited document has changed, its citation will be highlighted in yellow.

HIDING/SHOWING FLAGS AND LINKS

Click **Hide/Show Flags & Links** on the West BriefTools home page or click the **Hide/Show Flags & Links** button on the toolbar to toggle between hiding and showing the KeyCite status flags and links in the document.

REMOVING FLAGS AND LINKS

Click **Remove Flags & Links** on the West BriefTools home page or click the **Remove Flags & Links** button on the toolbar to delete all KeyCite status flags and links in your document.

Monitoring Citations with KeyCite Alert

The Monitor/KeyCite Alert feature allows you to monitor the status of documents cited by your document.

1. Open your legal document in Word or WordPerfect.
2. Click **Monitor/KeyCite Alert** on the West BriefTools home page or click the **Monitor/KeyCite Alert** button on the toolbar.

The Monitor Citations with KeyCite window is displayed.

3. Select the check box next to the citation of each document you want to monitor.
Click **Deselect statute check boxes** if you do not want to include statutes in your request.
4. Choose KeyCite options from the *For cases* drop-down list, the *For statutes* drop-down list, or both drop-down lists.

Click **Limit Citing Refs** to limit citing references. The Limit Citing References window is displayed, as shown below. Select your options and click **OK**.

The Locate feature enables you to search the text of citing references and limit your KeyCite result to those documents that contain specific terms.

Type your Locate terms in the *Locate Query* text box as you would a Terms and Connectors query.

Figure 2. Limit Citing References window

5. Leave the delivery settings as they are or change them by clicking **Edit**. Click **Save** after you finish making your changes.
6. Complete the entry details.
7. Click **Go**.

Using Local Documents

The Local Documents feature retrieves all of your firm's internal documents that contain a particular citation. Documents must first be added to and indexed in Local Search Indexing Administration. Local Search Indexing Administration runs in its own interface and stores document locations for indexing. Click **Local Search Indexing Administration** on the West BriefTools home page to open it.

To retrieve a document using Local Documents, complete the following steps:

1. Click **Local Docs** on the West BriefTools home page or click the **Local Docs** button on the toolbar. The Local Documents dialog box is displayed.
Note Click **Admin** to open Local Search Indexing Administration.
2. Type the citation for which you want to search in the *Citation* text box and click **OK**. All documents containing that citation are listed in the Local Documents Display window.
3. Click a document name to open it.

Creating a Report

For information on creating an online report with KeyCite status flags and links to the full-text documents on Westlaw using WestCheck®, see the *WestCheck User Manual* on west.thomson.com/westlaw/guides.