

# WEST BRIEFTOOLS 2.3 USER MANUAL

FOR MICROSOFT WORD AND COREL WORDPERFECT

APRIL 2010



THOMSON REUTERS™

Westlaw®



# WEST BRIEFTOOLS 2.3 USER MANUAL

FOR MICROSOFT WORD AND COREL WORDPERFECT

# West Customer Service

---

## **Westlaw Technical and Search Assistance (available 24 hours a day)**

If you have general or technical questions about Westlaw, call West Customer Technical Support at 1-800-WESTLAW (1-800-937-8529) or send an e-mail message to [west.support@thomson.com](mailto:west.support@thomson.com).

If you have search questions about Westlaw, call the West Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889) or send an e-mail message to [west.referenceattorneys@thomson.com](mailto:west.referenceattorneys@thomson.com).

Technical and search assistance is also available online at [help.west.thomson.com](http://help.west.thomson.com).

Law students with general, technical, or search questions about Westlaw can call 1-800-850-WEST (1-800-850-9378).

## **Accessibility Support**

For information on West's accessibility policy, go to [west.thomson.com/accessibility](http://west.thomson.com/accessibility).

## **Billing and Account Assistance**

For billing and account assistance, call 1-800-328-4880.

Billing and account assistance is also available online at [west.thomson.com/support](http://west.thomson.com/support).

## **Westlaw Training**

For information about Web-based training, telephone training, or in-person training, visit [west.thomson.com/westlaw/training](http://west.thomson.com/westlaw/training).

## **Reference Materials**

For free reference materials, visit [west.thomson.com/westlaw/guides](http://west.thomson.com/westlaw/guides). Westlaw and other West products also contain valuable online Help.

## **About This Guide**

In this guide, the graphics and step-by-step instructions are based on accessing Westlaw via the Internet. Because of the evolving nature of Internet technology, there may be recent changes to the Westlaw interface and functionality that are not reflected in this documentation.

Information in this guide is current through April 2010.

Author: Tanya Zehnder, Sr. Technical Writer.

ALR, BriefTools, KeyCite, WestCheck, West km, and Westlaw are registered trademarks of West Publishing Corporation.

Internet Explorer, Microsoft, Windows, and Windows Vista are registered trademarks of Microsoft Corporation.

Corel and WordPerfect are registered trademarks of Corel Corporation.

© 2010 Thomson Reuters. All rights reserved.

West

610 Opperman Drive

Eagan, MN 55123-1396

Printed in the United States of America

# Contents

---

<b>1 INTRODUCTION TO WEST BRIEFTOOLS</b> .....	<b>1</b>
What Is West BriefTools? .....	2
System Requirements .....	2
Features Available in BriefTools .....	2
Interactive Citation Checking .....	2
Monitor Citations with KeyCite .....	2
Integration with West km .....	3
Reports .....	3
<b>2 USING WEST BRIEFTOOLS</b> .....	<b>5</b>
Starting BriefTools .....	6
Working with KeyCite Status Flags .....	6
What Are KeyCite Status Flags? .....	6
Red Flag .....	6
Yellow Flag .....	6
Blue H .....	6
Green C .....	6
Red KC .....	6
Inserting Links .....	7
Inserting Flags and Links .....	7
Updating Flags .....	7
Hiding/Showing Flags and Links .....	7
Removing Flags and Links .....	7
Using Monitor Citations with KeyCite .....	7
Creating a Monitor/Keycite Alert Entry .....	7
Depth of Treatment Categories .....	10
Formatting a Terms and Connectors Query .....	10
Searching for Compound Words. ....	10
Searching for Abbreviations .....	10
Using the Root Expander. ....	10
Using the Universal Character .....	11
Using Connectors .....	11
Creating a Report .....	12
<b>3 CUSTOMIZING WEST BRIEFTOOLS</b> .....	<b>13</b>
Modifying the Citation Finding Options .....	14
Modifying the System Options .....	16
Modify the Logging Options .....	17
Modifying the Authentication Settings .....	17



# 1 Introduction to West BriefTools

---

- What Is West BriefTools?.....2
- System Requirements . . . . .2
- Features Available in BriefTools.....2

## What Is West BriefTools?

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 individual citations and citations within your documents.

BriefTools 2.3, the latest version, installs into West Solutions Framework, in Microsoft Word or Corel WordPerfect, and is integrated with West km for West km users. West Solutions Framework is the new interface that makes using, managing, and accessing West Solutions products easier than ever.

Download the latest version of BriefTools and the West Solutions Framework at <http://west.thomson.com/software/brieftools/default.aspx>.

**Note** You cannot install BriefTools version 1.x and 2.x on the same computer.

## System Requirements

- Processor: PC with 600 MHz processor or faster (Intel Pentium/Celeron family or AMD K6/Athlon/Duron family)
- Hard disk space: 2 GB
- Memory: At least 256 MB of available RAM
- Internet connection
- Operating system: Windows 2000 (Service Pack 4 or later), Windows XP Professional, Windows Vista 32-bit or 64-bit, or Windows 7
- Browser: Microsoft Internet Explorer 6.0 or later
- Additional software: West Solutions Framework, West Updater (optional), Microsoft .NET Framework Version 2.0, and Microsoft Word 2007, 2003, 2002, or 2000 or one of the following WordPerfect versions:
  - WordPerfect X4 Service Pack 1 (14.0.0.677)
  - WordPerfect X3 (13.0.0.406)
  - WordPerfect 12 Service Pack 2 (12.0.0.499)
  - WordPerfect 11 Service Pack 1 (11.0.0.300)
  - WordPerfect 10 Service Pack 3 (10.0.0.719)

## Features Available in BriefTools

### INTERACTIVE CITATION CHECKING

Simply click a button in your legal document to insert KeyCite status flags and links from each citation in your document to the full-text documents on Westlaw. For more information, see “Working with KeyCite Status Flags” on page 6.

### MONITOR CITATIONS WITH KEYCITE

The Monitor Citations with KeyCite feature allows you to monitor the status of individual citations and citations within your documents. For more information, see “Using Monitor Citations with KeyCite” on page 7.

## **INTEGRATION WITH WEST KM**

West km users can now use BriefTools to find citations in their legal documents and insert links and KeyCite flags from each citation to its source on Westlaw.

## **REPORTS**

You can create an online or offline summary report for each case, statute, regulation, rule, and administrative decision cited in your document using WestCheck. The online report includes a navigational index, KeyCite status flags, and links to the full-text documents on Westlaw, as well as their KeyCite history and citing references. The offline report can be sent to an e-mail address, a fax machine, or a printer. For more information, see the *WestCheck User Manual* available at <http://west.thomson.com/support/user-guide/west-check.aspx>.



## 2 Using West BriefTools

---

Starting BriefTools	
Working with KeyCite Status Flags . . . . .	.6
What Are KeyCite Status Flags? . . . . .	.6
Inserting Links . . . . .	.7
Inserting Flags and Links . . . . .	.7
Updating Flags . . . . .	.7
Hiding/Showing Flags and Links . . . . .	.7
Removing Flags and Links . . . . .	.7
Using Monitor Citations with KeyCite . . . . .	.7
Creating a Monitor/Keycite Alert Entry . . . . .	.7
Depth of Treatment Categories . . . . .	.10
Formatting a Terms and Connectors Query . . . . .	.10
Creating a Report . . . . .	.12

## Starting BriefTools

1. Open your legal document in Microsoft Word or Corel WordPerfect.
2. Choose **West BriefTools** from the West Solutions *Select Product* drop-down list or click the **West BriefTools** button on the toolbar.

## Working with KeyCite Status Flags

You can instantly insert KeyCite status flags and create links from the citations in your document to the full-text documents on Westlaw.

### WHAT ARE KEYCITE STATUS FLAGS?

A KeyCite status flag lets you know immediately the status of a case, statute, regulation, rule, or administrative decision. KeyCite flags are also available for patents.

#### 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 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.

#### Red KC

A red KC indicates that a citation could not be verified. Click this icon to display a list of documents on Westlaw that are potential matches.

## INSERTING LINKS

While viewing a legal document in Word or WordPerfect, click **Insert Links** under *West BriefTools* 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 legal document in Word or WordPerfect, click **Insert Flags & Links** under *West BriefTools* in the left frame 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 move to the KeyCite result or full-text document on Westlaw.

## UPDATING FLAGS

Click **Update Flags** under *West BriefTools* in the left frame or click the **Update Flags** button on the toolbar to see whether there has been a change in the status of the documents cited in your document. If there has been a change in 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** under *West BriefTools* in the left frame or click the **Hide/Show Flags & Links** button on the toolbar to toggle between hiding and showing the KeyCite status flags and links in your document.

## REMOVING FLAGS AND LINKS

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

## Using Monitor Citations with KeyCite

The Monitor Citations with KeyCite feature in BriefTools allows you to monitor the status of documents cited by your document.

### CREATING A MONITOR/KEYCITE ALERT ENTRY

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

A message is displayed indicating that BriefTools is finding and validating citations in your document. The Monitor Citations with KeyCite window is displayed in a new browser window, as shown in Figure 2-1 on page 8.

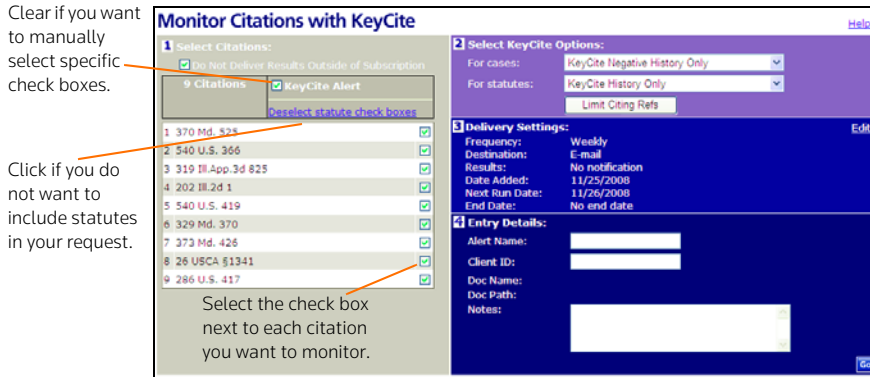


Figure 2-1. Monitor Citations with KeyCite window

3. Select the **Do Not Deliver Results Outside of Subscription** check box if you do not want any results outside of your subscription plan included in the request.
4. Make sure the check box next to each citation you want to monitor is selected. (All check boxes are automatically selected.) If you want to manually select the check boxes next to the citations you want to monitor, clear the **KeyCite Alert** check box and then select the check boxes next to the citations you want to monitor.
5. Click **Deselect statute check boxes** if you do not want to include statutes in your request.
6. Choose KeyCite options.
  - For cases, choose a KeyCite option from the *For cases* drop-down list: **KeyCite Negative History Only**, **KeyCite History with Citing Refs (References)**, **KeyCite Negative History with Citing Refs**, **KeyCite History without Citing Refs**, or **Citing References Only**.
  - For statutes, choose a KeyCite option from the *For statutes* drop-down list: **KeyCite History Only**, **KeyCite History with Citing Refs**, or **Citing References Only**.
  - Click **Limit Citing Refs** to limit citing references. The Limit Citing References window is displayed, as shown in Figure 2-2.

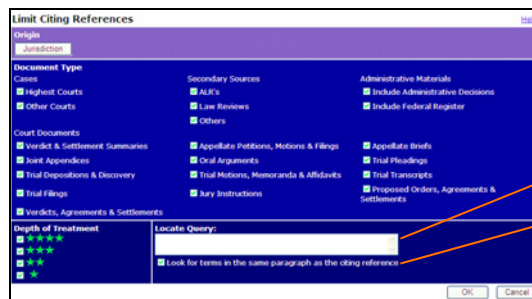
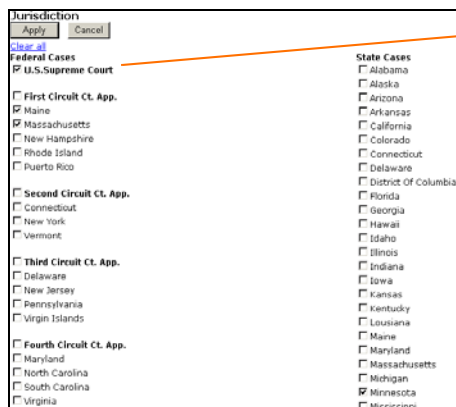


Figure 2-2. Limit Citing References window

- Click **Jurisdiction** to restrict the citing references to those from a specific jurisdiction. The Jurisdiction window is displayed, as shown in Figure 2-3 on page 9. Click **Apply** when you have finished selecting your jurisdiction(s).



Select one or more check boxes to restrict the list of citing references to the jurisdictions that have issued cases citing your case or statute.

Figure 2-3. Jurisdiction window

- Under *Document Type*, restrict the citing references to cases from a jurisdiction’s highest court or its lower courts. Include or exclude citations from *American Law Reports* (ALR) annotations, law review articles, and other secondary sources.
  - Restrict the citing references to one or more depth of treatment categories by selecting the check box next to the desired category. See “Depth of Treatment Categories” on page 10 for more information.
  - 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 (see “Formatting a Terms and Connectors Query” on page 10 for more information). If you want your Locate terms to appear in the same paragraph as the cited reference, select the check box below the *Locate Query* text box.
  - Click **OK** when you have finished making your selections.
7. Leave the delivery settings as they are or change them by clicking **Edit**. Click **Save** after you have finished making your changes.
    - Choose how often you want citations monitored from the *Frequency* drop-down list: **Weekly**, **Daily**, **Weekdays/M-F**, **Biweekly**, or **Monthly**.
    - Choose where you want the request delivered from the *Destination* drop-down list: **E-mail**, **Attached Printer**, **Download to Disk**, **Fax Machine**, or **Save**. If you choose **Fax Machine** or **E-mail**, click **Properties** to enter the fax machine number, e-mail addresses, or wireless device e-mail addresses.
    - Select the **Inform me of no results** check box if you want to be notified when no results are retrieved by your request.
    - Click the calendar icon next to *Next Run Date* to select the date you want the request to run or type the date in the text box.
    - Click the calendar icon next to *End Date* to select the date on which you want the request to end or type the date in the text box.
  8. Complete the entry details.
    - Type a name for the entry in the *Alert Name* text box.

- Type a client identifier in the *Client ID* text box.
- Type any notes in the *Notes* text box.

9. Click **Go**.

#### 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.

#### FORMATTING A TERMS AND CONNECTORS QUERY

##### Searching for Compound Words

A compound word may appear as one word, as a hyphenated word, or as two separate words. If your search term is a compound word, use its hyphenated form to retrieve all variations.

Type	To retrieve
whistle-blow	<i>whistleblow</i>
	<i>whistle-blow</i>
	<i>whistle blow</i>

##### Searching for Abbreviations

Abbreviations may appear with or without periods or spaces. To retrieve the various forms of an abbreviation, enter it with periods and without spaces.

Type	To retrieve
h.i.v.	<i>H.I.V.</i>
	<i>H. I. V.</i>
	<i>HIV</i>
	<i>H I V</i>

##### Using the Root Expander

Use the root expander (!) to retrieve words with variant endings. The root expander must always be placed at the end of a term.

Type	To retrieve
contribut!	<i>contributed</i>

Type	To retrieve
contribut!	<i>contributor</i>
	<i>contributing</i>
	<i>contribution</i>
	<i>contributory</i>

**Tip** Plurals and possessive forms of terms are automatically retrieved without a root expander when you enter a singular or nonpossessive form.

### Using the Universal Character

Use the universal character (\*) to represent one variable character. You can place the universal character anywhere in a term except at the beginning.

Type	To retrieve
gr*w	<i>grew</i>
	<i>grow</i>

**Note** When you place one or more universal characters at the end of a term, you specify the maximum length of that term.

### Using Connectors

Use connectors to specify the relationships that should exist between search terms in your retrieved documents.

Type	To retrieve documents that contain
& (and)	both terms
a space (or)	either term or both terms
/s	terms in the same sentence
/p	terms in the same paragraph
/n	terms within <i>n</i> terms of each other (where <i>n</i> is a number)
+n	the first term preceding the second by <i>n</i> terms (where <i>n</i> is a number)
+s	the first term preceding the second within the same sentence
""	terms appearing in the same order as in the quotation marks

Type	To exclude documents that contain
% (but not)	search terms following the percent symbol

## Creating a Report

You can create a summary report for each case, statute, regulation, rule, and administrative decision cited in your document in WestCheck. You can choose to view a report online and then print or save it or deliver an offline report to a printer, e-mail address, or fax machine. 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 information on creating a report in WestCheck, see the *WestCheck User Manual* at <http://west.thomson.com/support/user-guide/west-check.aspx>.

# 3 Customizing West BriefTools

---

- Modifying the Citation Finding Options .....14
- Modifying the System Options .....16
- Modify the Logging Options .....17
- Modifying the Authentication Settings .....17

## Modifying the Citation Finding Options

On the Cite Finding Options tab, you can add, modify, delete, or search for publications; add, modify, or delete explanatory phrases; and edit citation verification options.

**Note** You will not be able to change the Citation Finding options during a session that is in process.

1. Click **West BriefTools Options** under *West BriefTools* in the left frame.

The BriefTools Options dialog box is displayed with the Cite Finding Options tab displayed (see Figure 3-1 and Figure 3-2 below).

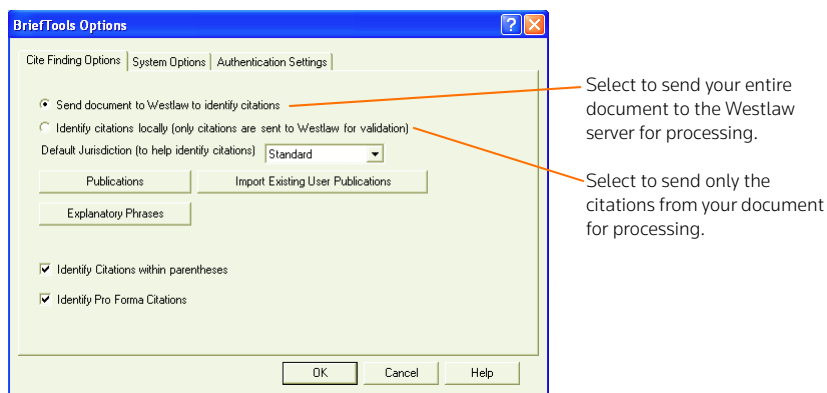


Figure 3-1. BriefTools Options dialog box–Cite Finding Options tab for non West km users

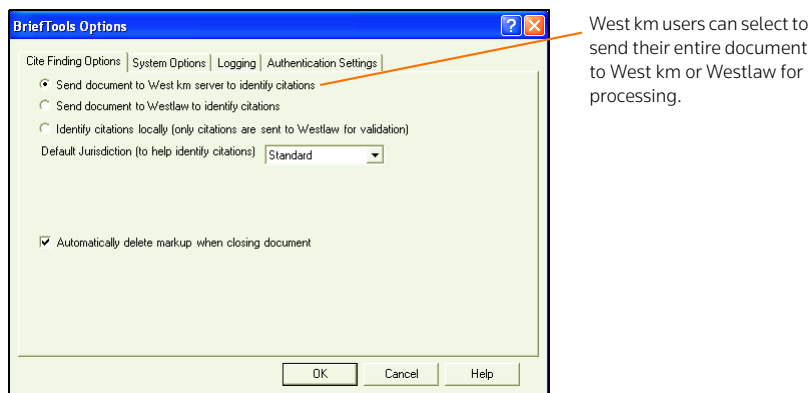


Figure 3-2. BriefTools Options dialog box–Cite Finding Options tab for West km users

1. **West km users** Select **Send document to West km server to identify citations** if you are a West km user. This will ensure that your West km citing references flags are displayed.

**Non West km users** Select **Send document to Westlaw to identify citations** to send your entire document to the Westlaw server for processing. Or, select **Identify citations locally (without sending document text to West)** to send only the citations from your document for processing.

**Note** West km users may select one of these options if their West km server is down.

2. **Non West km users** Choose a default jurisdiction to aid in citation identification from the *Default*

*Jurisdiction* drop-down list.

3. **Non West km users** Click **Publications** to add, modify, delete, or search for publications.  
**Note** You can only delete custom publications that you have added.
4. **Non West km users** Click **Import Existing User Publications** to import any custom publications that you added to the previous version of BriefTools. BriefTools will search for any of the following files in C:\Program Files\West Group\Common\ : uclabbr.dat, uclpubab.dat, upubs.dat, ustabbrv.dat, ustpubab.dat, uexpphr.dat.
5. **Non West km users** Click **Explanatory Phrases** to add, modify, or delete explanatory phrases.
6. **West km users** Clear the **Automatically delete markup when closing document** check box if you do not want BriefTools to delete the markup in your document before closing it.
7. **Non West km users** Clear the **Identify Citations within parentheses** check box if you do not want BriefTools to identify citations within parentheses.
8. **Non West km users** Clear the **Identify Pro Forma Citations** check box if you do not want BriefTools to identify pro forma citations (citations introduced by an explanatory phrase, e.g., cert. denied).
9. Click **OK**.

## Modifying the System Options

On the System Options tab, you can choose the desired cost recovery password option.

1. Click **West BriefTools Options** under *West BriefTools* in the left frame.  
The BriefTools Options dialog box is displayed.
2. Click the **System Options** tab, as shown in Figure 3-4 and Figure 3-4.

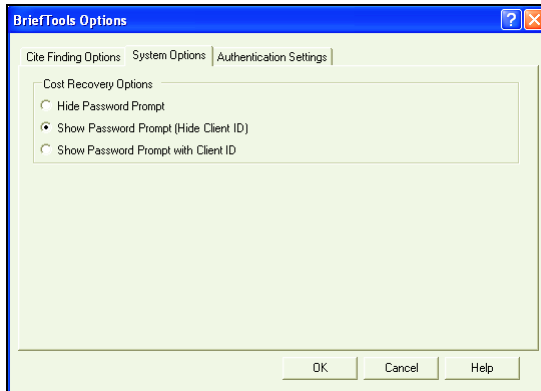


Figure 3-3. BriefTools Options dialog box–System Options tab for non West Km users

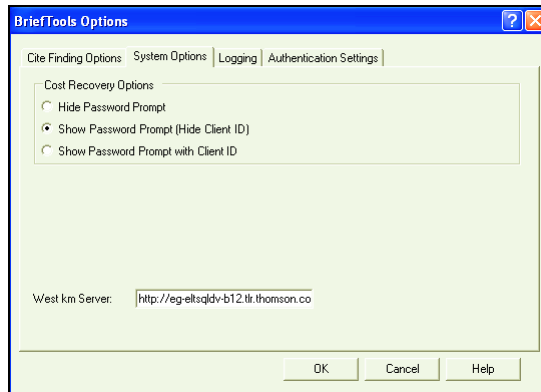


Figure 3-4. BriefTools Options dialog box–System Options tab for West Km users

3. Under *Cost Recovery Options*, select the desired password option.
  - Select **Hide Password Prompt** to hide the prompt for a password when signing on to BriefTools.
  - Select **Show Password Prompt (Hide Client ID)** to display the prompt for a password when signing on to BriefTools but hide the client ID prompt.
  - Select **Show Password Prompt with Client ID** to display the prompts for a password and a client ID when signing on to BriefTools.

**West km users** You can edit the location of the West km server in the *West km Server* text box.

## Modify the Logging Options

The Logging tab includes settings for log files. A log file is generated every day.

1. Click **West BriefTools Options** under *West BriefTools* in the left frame.  
The BriefTools Options dialog box is displayed.
2. Click the **Logging** tab, as shown in Figure 3-5.

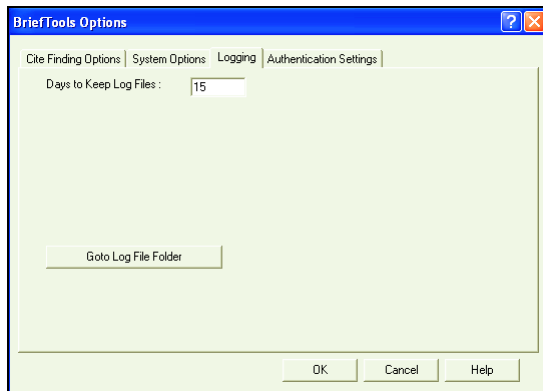


Figure 3-5. BriefTools Options dialog box–Logging tab

3. In the *Days to Keep Log Files* text box, enter the number of days you want to keep log files stored on your computer. The default is 15; there is no maximum.
4. Click **Go to Log File Folder** to go to the location where log files are stored on your computer.
5. Click **OK**.

## Modifying the Authentication Settings

On the Authentication Settings tab, you can set options for transparent authentication into Westlaw. This allows you to give a user access to documents on Westlaw without giving the user a Westlaw password (and full Westlaw access).

**Note** Your organization must be set up for this functionality before you can use this feature. Call your Thomson Reuters Technology Consultant or 1-800-WESTLAW (1-800-937-8529) for more information.

1. Click **West BriefTools Options** under *West BriefTools* in the left frame.  
The BriefTools Options dialog box is displayed.
2. Click the **Authentication Settings** tab, as shown in Figure 3-6 on page 18.

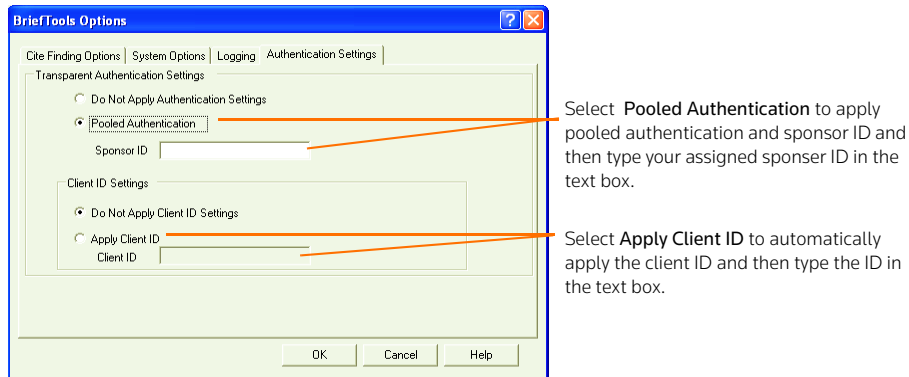


Figure 3-6. BriefTools Options dialog box–Authentication Settings tab

3. Under *Transparent Authentication Settings*, select **Do Not Apply Authentication Settings** if you don't want to automatically apply authentication settings. The user will be required to enter a Westlaw password and a client identifier before viewing the full text of a document on Westlaw.
4. Select **Pooled Authentication** to apply pooled authentication and sponsor identifier. This allows the user to access Westlaw without entering a Westlaw password. Type the sponsor identifier that was assigned to you in the text box.
5. Under *Client ID Settings*, select **Do Not Apply Client ID Settings** if you don't want the client identifier automatically entered. The user will be required to manually enter the client identifier.
6. Select **Apply Client ID** to automatically apply the client identifier. Type the client identifier in the text box.
7. Click **OK**.







Published 4/10. Material #41038545. Replaces Material #40880893.

© 2010 Thomson Reuters L-349909

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



THOMSON REUTERS™