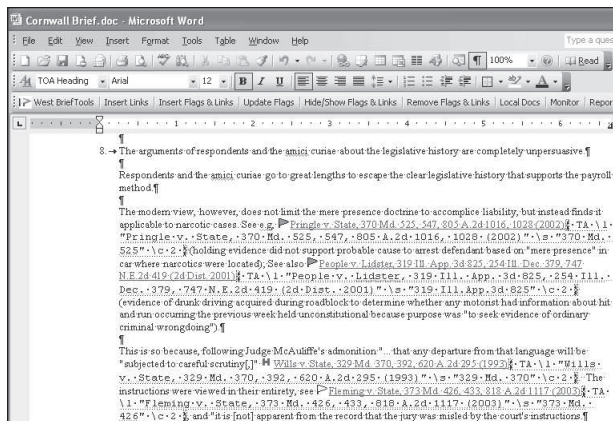


Using West BriefTools with Local Documents

BriefTools is a legal research product from West that allows you to instantly view the status of cited cases, regulations, rules, and administrative decisions and link to the full-text documents on Westlaw®; retrieve all internal documents that contain a particular citation; monitor the status of citations within your documents; and create an online report with KeyCite® status flags and links to the full-text documents on Westlaw.

Interactive Citation Checking

Instantly insert KeyCite status flags and create links from the citations in your document to the full-text documents on Westlaw. While viewing a legal document in Microsoft® Word or Corel® WordPerfect®, 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.



Sample Microsoft Word document with flags inserted

Updating Flags

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

Hiding/Showing Flags and Links

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.

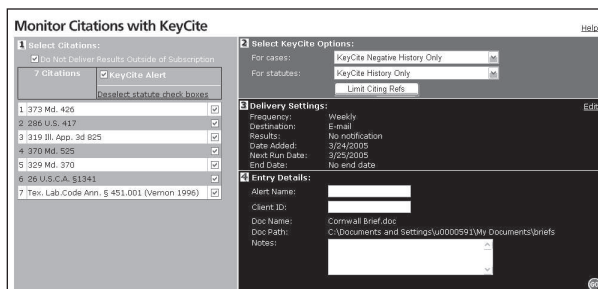
Removing Flags and Links

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

Monitor Citations with KeyCite

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

1. Open your document in Word or WordPerfect.
2. Click the **Monitor** 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. Select KeyCite options from the *For cases* drop-down list or the *For statutes* drop-down list.



Monitor Citations with KeyCite window

For technical assistance, call West Customer Technical Support at **1-800-WESTLAW** (1-800-937-8529).

For search assistance, call the West Reference Attorneys at **1-800-REF-ATTY** (1-800-733-2889).

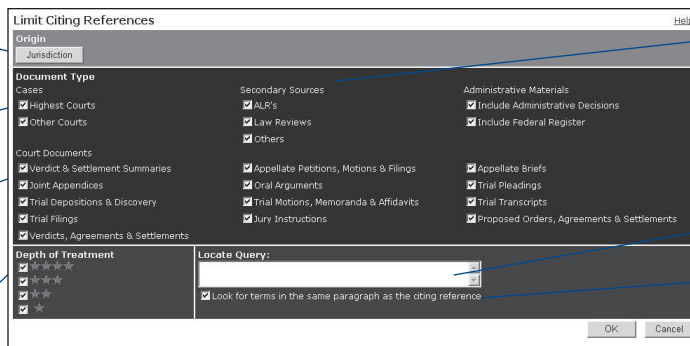
Click **Limit Citing Refs** to limit citing references. The Limit Citing References window is displayed.

Click **Jurisdiction** to restrict the citing references to a specific jurisdiction.

Restrict the citing references to cases from a jurisdiction's highest court or its lower courts.

Restrict the citing references to specific court documents.

Restrict the citing references to one or more depth of treatment categories by selecting the check box next to the desired category.



Include or exclude citations from *American Law Reports* annotations, law review articles, and other secondary sources.

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. If you do not want the Locate terms to appear in the same paragraph as the citing reference, clear the check box.

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.

- 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.

7. Click **Go**.

Local Documents Feature

The Local Documents feature will retrieve all of your organization's internal documents that contain a particular citation. Documents must first be added to and indexed in BriefTools Administration. BriefTools Administration runs in its own interface and stores document locations for indexing. From the Start menu, choose **Programs, West Applications, BriefTools Administration** to open BriefTools Administration.

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

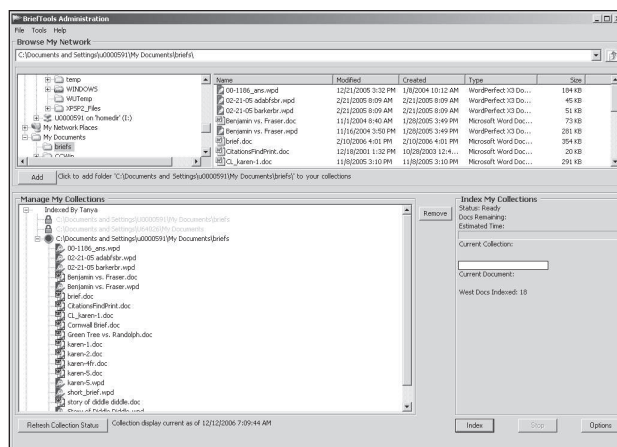
1. Click the **Local Docs** button on the toolbar.

The Local Documents dialog box is displayed.

2. Type the citation for which you want to search in the *Citation* text box and click **OK**. Click **Admin** to open BriefTools Administration.

Any documents containing that citation are listed in the Local Documents Display window.

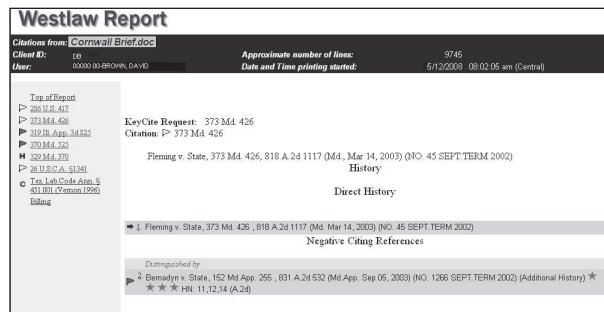
3. Click a document name to open it.



BriefTools Administration

Create a Report

You can create a summary report for each case, statute, regulation, and administrative decision cited in your document by clicking the **Report** button on the toolbar. You can choose to view a report online and then print or save it or deliver an offline report to a Westlaw printer, e-mail address, or fax machine. The online report includes a navigational index, summary report and detail report sections, KeyCite status flags, depth of treatment stars, and KeyCite quotation marks.



Sample Report

