



WEST CITEADVISOR USER MANUAL

SERVER VERSION

JULY 2009



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WEST CITEADVISOR USER MANUAL

SERVER VERSION

JULY 2009

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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 July 2009.

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610 Opperman Drive

Eagan, MN 55123-1396

Printed in the United States of America

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1 Introduction to West CiteAdvisor

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What Is CiteAdvisor?

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

- identifies legal citations (cases, statutes, court rules, regulations, constitutions, administrative decisions, and journal and law review articles) in the user's Microsoft Word 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 the user complete control over which citation changes to make—no changes are made without the user's approval.
- applies correct formatting directly to the user's document.
- creates a properly formatted table of authorities in the user's document.

Features Available in CiteAdvisor

CiteAdvisor offers 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; CiteAdvisor scans your Microsoft Word document and suggests formatting changes you can accept or reject.

Accessing CiteAdvisor

Access CiteAdvisor at citeadvisor.westlaw.com.

System Requirements

- Internet connection
- One of the following browsers with Javascript and cookies enabled:
 - Microsoft Internet Explorer 6.0 or later
 - Firefox 1.0 or later
 - Netscape Navigator 7.0 or later
 - Safari 1.1 or later
- Microsoft Word 2007 (.docx documents must be converted to .doc documents for processing), 2003, 2002, or 2000
- Windows Vista, Windows XP, or Windows 2000

2 Using CiteAdvisor

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Using CiteAdvisor

1. Access CiteAdvisor at citeadvisor.westlaw.com. The West CiteAdvisor sign-on page is displayed (see Figure 2-1).



Figure 2-1. West CiteAdvisor sign-on page

2. Type your Westlaw password and a client identifier in the appropriate text boxes.
3. Click **Sign On**. The West CiteAdvisor home page is displayed (see Figure 2-2).

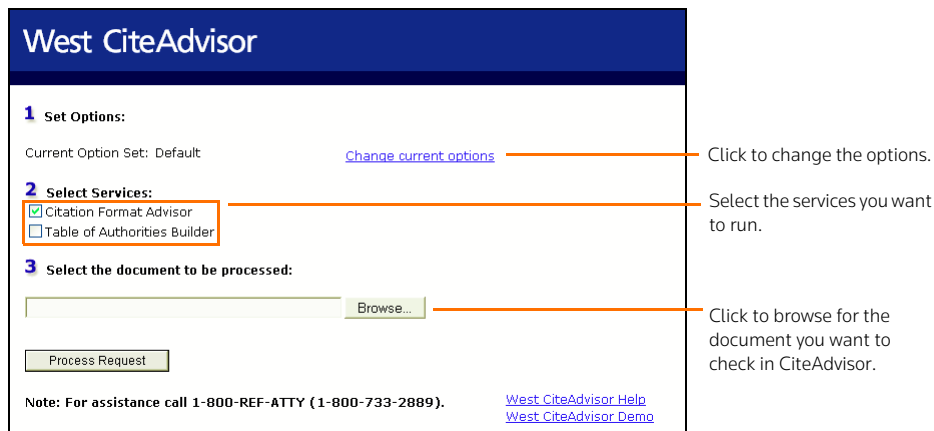


Figure 2-2. West CiteAdvisor home page

4. Set the options. The current option is listed. To change your options, click **Change current options**. See "Setting CiteAdvisor Options" on page 5 for more information.
5. Specify the services you want to run. Select the **Citation Format Advisor** check box to run CiteAdvisor and select the **Table of Authorities Builder** check box to create a table of authorities. See "Using the Citation Format Advisor" on page 8 and "Using the Table of Authorities Builder" on

page 9 for more information. It is considered best practice to use the Citation Format Advisor and the Table of Authorities Builder together; it's also less expensive than using just one of the services.

6. Select the document you want to check by clicking **Browse**. Select the file and click **Open**.
7. Click **Process Request**.
Your results are displayed.

Setting CiteAdvisor Options

WORKING WITH OPTION SETS

Creating a New Option Set

1. To create a new option set, click **Change current options** on the home page. The West CiteAdvisor Options Entry page is displayed (see Figure 2-3.).

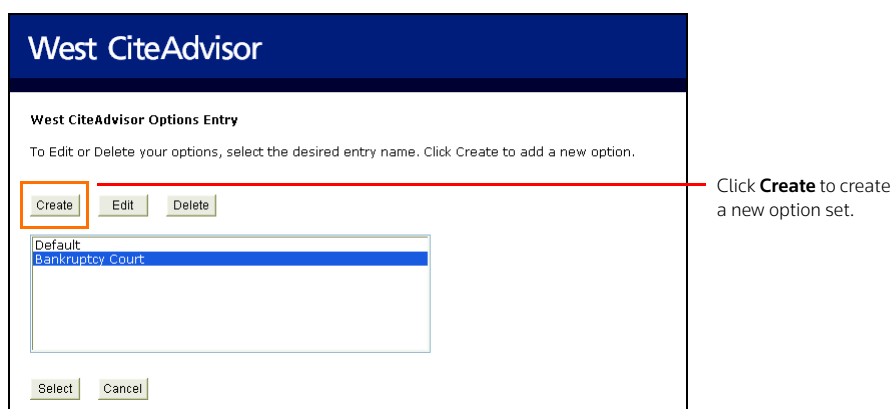


Figure 2-3. West CiteAdvisor Options Entry page

2. Click **Create**. The West CiteAdvisor option details page is displayed (see Figure 2-4 on page 6).
3. Type a name for the option settings in the text box.
4. Choose a default jurisdiction from the *Default Jurisdiction* drop-down list to help identify citations.
5. 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**.
6. Set the options under *Citation Format Advisor* and *Table of Authorities Builder*, as described on pages 7–9.
7. Click **Save**.

Figure 2-4. West CiteAdvisor option details page

Editing an Option Set

To edit an option set, complete these steps:

1. Select the option set from the list on the West CiteAdvisor Options Entry page (see Figure 2-3) and then click **Edit**.
2. Make your changes and then click **Save**.

Deleting an Option Set

To delete an option set, select it in the list and then click **Delete**. The option set is immediately deleted.

SELECTING CITATION FORMAT ADVISOR OPTIONS

Figure 2-5 shows the available options for the Citation Format Advisor.

Figure 2-5. Citation Format Advisor options

1. Choose the desired citation rules from the *Rules for citations* drop-down list: **Bluebook, ALWD, California, New York, Florida, Texas, or Illinois.**
2. Choose the desired citation style from the *Citation Style* drop-down list: **Legal Briefs or Law Reviews.**
3. Select the desired formatting preferences under *Formatting Preferences*. Select one or more of the following check boxes: **Underline Title, Italicize Title, and Include Subsequent History.**

Note If you have a document limit, clearing the **Include Subsequent History** check box will free up space in your documents.

4. Select the desired type of parallel citations:
 - **Allow West CiteAdvisor to suggest which citations to include.**
 - **Include only one citation per authority cited** and then select 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. Click **Save**.

SELECTING TABLE OF AUTHORITIES BUILDER OPTIONS

Figure 2-6 shows the available options for the Table of Authorities Builder.

Figure 2-6. Table of Authorities Builder options

1. Select the desired formatting preferences for the table of authorities under *Formatting Preferences*. Select one or more of the following check boxes.
 - **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 state and federal 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. Choose the desired tab leader from the *Tab Leader* drop-down list.
 3. Choose the desired font style for headings from the *Heading Font Style* drop-down list: **Regular**, **Italic**, or **Bold**.
 4. Click **Save**.

Using the Citation Format Advisor

The Citation Format Advisor identifies citations in your legal document and suggests the correct citation format if necessary.

1. At the home page, select the **Citation Format Advisor** check box (see Figure 2-7).

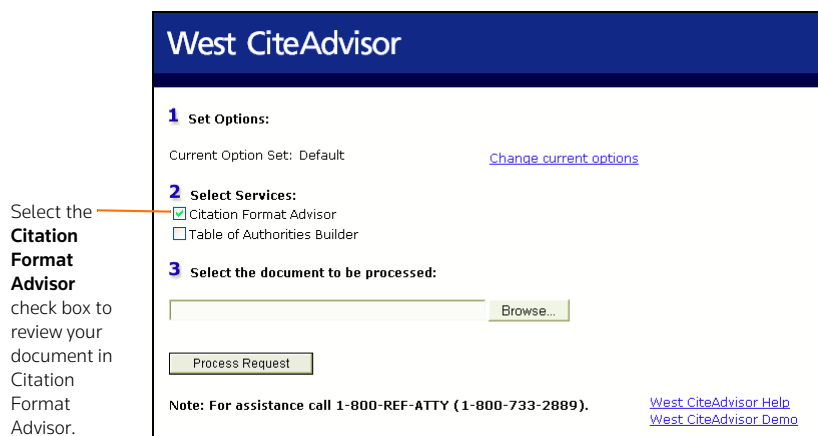


Figure 2-7. West CiteAdvisor home page with the *Citation Format Advisor* check box selected

2. Click **Browse** to select the Word document containing the citations you want CiteAdvisor to review.
3. Click **Process Request**. The first citation that is recognized is highlighted in yellow in the text box at the top of the page (see Figure 2-8 on page 9). The citation is also displayed in the *Citation* text box. If the citation is not correctly displayed in the *Citation* text box, click **Edit Citation Range** to make corrections to the boundaries of the citation. Highlight the desired text and click **Accept Change**.

Note You can edit the citation range only if you accept the suggestion.

4. The CiteAdvisor suggestion is displayed in the *Suggestion* text box. To accept the suggestion, click **Accept**. If there are multiple suggestions, first select the desired suggestion, then click **Accept**. Or, click **Ignore Suggestion** to ignore the suggestion and move to the next suggestion. If the citation is not valid, click **Not a Citation** to move to the next suggestion. This will ensure that the citation will not be included in the table of authorities.

Note The reporter citation to very recent cases may be unofficial and could change.

5. Click **Cancel Process** to quit or to check a new document.

Note Billing starts at the first suggestion.

If you selected both the Citation Format Advisor and Table of Authorities Builder services at the West CiteAdvisor home page, you can go directly to the Table of Authorities Builder after you finishing checking the citations in your documents in Citation Format Advisor. At the end of your document, click **Select TOA Point of Insertion**.

West CiteAdvisor

Legend Text Box Highlighting	
Citation	Current citation
Citation	The citation suggestion was accepted
Citation	The citation suggestion was not accepted

Tex. Labor Code Ann. § 451.001 [plover from discharging an employee for filing a workers' compensation claim in good faith. See Tex. Labor Code Ann. § 451.004 (Vernon).] (Vernon). [Citation 1524]

Perhaps the amicus preference for the more expensive and cumbersome test reflects an acceptance of the associated costs as a matter of tactics. After all, even a small business is better able than an individual Title VII claimant to withstand compliance and litigation costs. Perhaps the business community recognizes that a complex jurisdictional test is another difficult barrier for a Title VII claimant to overcome, especially since it is the employer who controls the records required for the jurisdictional count but the employee who has the burden of establishing jurisdiction.

4. Respondents also ignore the fact that the Comwall method creates irrational extra-statutory distinctions between employees. Respondents ignore another of petitioners' arguments: that the Comwall method creates irrational distinctions between employees, distinctions that find no basis in the statutory text or legislative history. Respondents do not answer these arguments and do not justify the irrational distinctions of the Comwall method—for example, between salaried and hourly and full-time and part-time employees, or between employees on flexible or weekend schedules. Nor do respondents attempt to tie these distinctions to the statutory language or history.

By their silence, respondents concede that those distinctions cannot be justified and that the Comwall method is nonsensical.

5. Respondents' new arguments about mid-week employment changes demonstrate that the payroll method gives full meaning to the phrase "for each working day."

Thus, respondents' re-analysis demonstrates that midweek employment changes give real meaning to the phrase "for each working day" by reducing the jurisdictional weeks in this case by a real and significant though not determinative number. [FN1]

Thereby, respondents completely demolish their own argument that the payroll method makes that phrase superfluous.

6. The suggestions of the amicus curiae about an increased caseload arising from the payroll method are completely misplaced. The amicus' broad warning is entirely unjustified. This case will affect a relatively narrow band of cases, those involving discrimination claims against employers that hover around the jurisdictional threshold in that they had fifteen employees on each working day of at least twenty calendar weeks, etc. As this case demonstrates, the employer would necessarily have to have at least fifteen employees on the payroll for at least those twenty weeks. Jurisdiction over those cases should be determined under the quick and easy payroll method.

7. A defining the broad interpretation of the exclusion as used by respondents and the amicus curiae is entirely unsupported in the case.

Confirming Citation 3 of 27 citations identified so far in your document

Citation:

Tex. Lab. Code Ann. § 451.001

If your citation is not identified correctly, click "Edit Citation Range" to correct boundaries

Suggestion:

Tex. Labor Code Ann. § 451.001 (Vernon)

West CiteAdvisor Tips

Accepted

Edit Citation Range

Ignore Suggestion

Not a Citation

Cancel Process

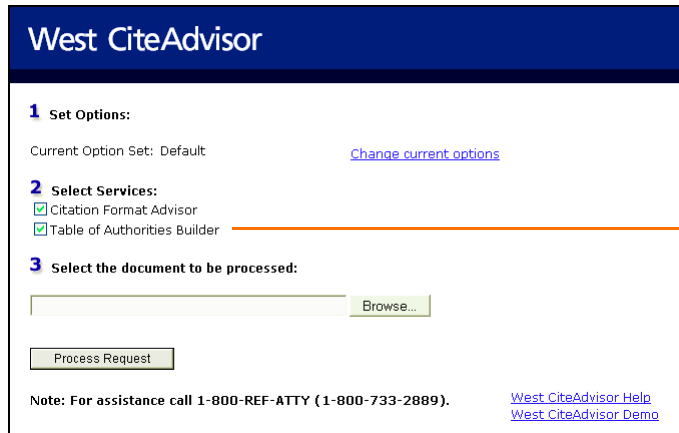
Figure 2-8. Sample Suggestion page

TEXT BOX HIGHLIGHTING LEGEND

Citation highlighted in yellow	Current citation
Citation highlighted in green	The citation suggestion was accepted
Citation highlighted in blue	The citation suggestion was not accepted

Using the Table of Authorities Builder

1. At the home page, select the **Table of Authorities Builder** check box (see Figure 2-9 on page 10).
2. Click **Browse** to select the Word document containing the citations you want reviewed.
3. Click **Process Request**. A page is displayed at which you can specify the table of authorities (TOA) insertion point (see Figure 2-10 on page 10).



Select the **Table of Authorities Builder** check box to insert a table of authorities in your document.

Figure 2-9. West CiteAdvisor home page with the *Table of Authorities Builder* check box selected

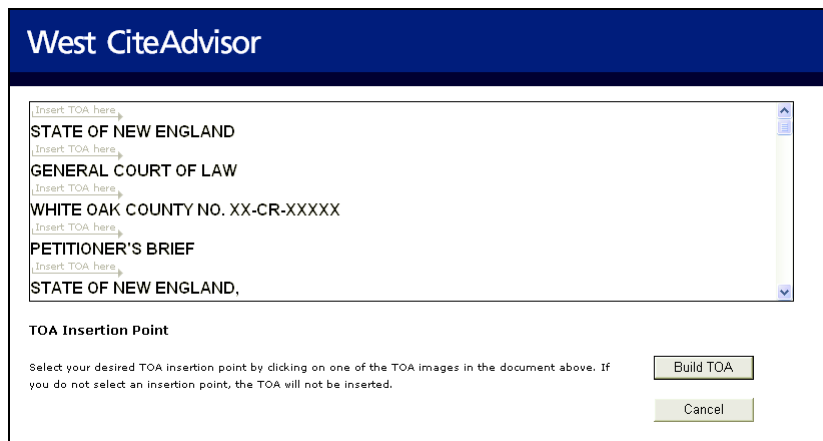


Figure 2-10. TOA insertion point page

4. Specify the desired TOA insertion point by clicking **Insert TOA here** at the desired insertion point. If you don't specify an insertion point, the table of authorities will be inserted at the top of the document.
5. Click **Build TOA**.

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

6. A message is displayed informing you that all citations have been processed. Click **Download Document** to download the document to your computer. Click **Print highlighted html version of document** at the top of the page to print an HTML version of the document. This HTML document allows you to review the changes you made in your document; it does not include the TOA.

Note If the highlighted text in your document does not appear when printing the document using the *Print highlighted html version of document* option, you may need to change your browser options by completing the following steps:

1. Choose **Internet Options** from the Tools menu.

2. Click the **Advanced** tab.
3. Scroll down to the *Printing* section and select the **Print background colors and images** check box.
4. Click **OK**.

Note The table of authorities is in alphabetical order. Page breaks are inserted before and after the table of authorities. Pagination is the same as the surrounding text in the document.

Printed 7/09. Material #40889550. Replaces Material #40769414.

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