

Using West CiteAdvisor®

Software Version

West CiteAdvisor identifies citations in your legal document and suggests the correct citation format if necessary. West CiteAdvisor follows *Bluebook* format, *ALWD Citation Manual* format, and state or local rules. West CiteAdvisor will also insert a table of authorities in your document.

You can download West CiteAdvisor at the West software download site at <http://west.thomson.com/software/cite-advisor/>. West CiteAdvisor, the software version, installs into the West Solutions Framework, in Microsoft® Word or Corel® WordPerfect®.

Using the Citation Format Advisor

1. Open the legal document that you want West CiteAdvisor to review in Word or WordPerfect.
2. Click the **West Solutions** tab on the toolbar.
3. Click the **West Solutions** button on the toolbar.
4. If the Westlaw® sign-on page is displayed, type your Westlaw password and a client identifier in the text boxes and click **Sign On**. Or, click **Username and Password** to sign on using your OnePass account.

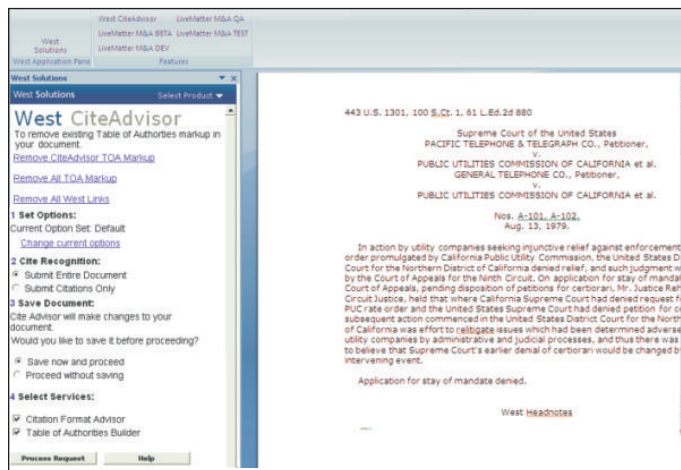


Figure 1. West CiteAdvisor home page

5. If the West CiteAdvisor home page is not displayed in the left frame, access West CiteAdvisor by choosing **West CiteAdvisor** from the *Select Product* drop-down list. If the Westlaw sign on page is displayed, see step 4.
6. To remove existing West CiteAdvisor table of authorities (TOA) markup, all TOA markup, or all West links from the document, click the appropriate link.
7. Set the options. The current option is listed. To change your options, click **Change current options**. See *Setting West CiteAdvisor Options* on page 2 for more information.
8. Select your citation recognition preference under *Cite Recognition*. Select **Submit Entire Document** to send your document to a West server for processing or select **Submit Citations Only** if you don't want to submit the entire document.
9. Save your document under *Save Document*. West CiteAdvisor will make changes to your document. To save it before proceeding, select **Save now and proceed** or select **Proceed without saving**.
10. Specify the services you want to run under *Select Services*. Select the **Citation Format Advisor** check box to run West CiteAdvisor. West recommends using the Citation Format Advisor and the Table of Authorities Builder together, rather than separately. See *Using the TOA Builder* on page 2.
11. Click **Process Request**. Your result is displayed. The first citation that is recognized is highlighted in blue in the document and displayed in the *Citation* text box in the left frame.

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**.

For assistance using West CiteAdvisor, call 1-800-WESTLAW (1-800-937-8529).

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

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

The West CiteAdvisor suggestion is displayed in the *Suggestion* text box. If you want 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 on to the next citation. If the citation is not valid, click **Not a citation** to move to the next citation. This will ensure that the citation will not be included in the table of authorities if you chose to create one.

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

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

Note Billing starts at the first suggestion.

Using the TOA Builder

1. Open the legal document in which you want to create a TOA in Word or WordPerfect.
2. Open West CiteAdvisor and sign on if necessary (see steps 4 and 5 on page 1).

3. Select the **Table of Authorities Builder** check box.
4. Click **Process Request**. The Inserting your TOA page is displayed in the left frame.

The TOA will be inserted in your document where your cursor is positioned. To specify a different location, click the desired point in your document.

5. Click **Build TOA**. The TOA is inserted at your cursor location and the sign-on page is displayed in the left frame.

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

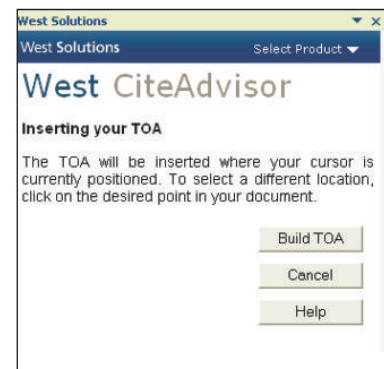


Figure 2. Inserting your TOA page

Setting West CiteAdvisor Options

To edit the options, click **Change current options** at the home page. To edit or delete an option, select it in the list and then click **Edit** or **Delete**.

1. To create a new option set (e.g., Bankruptcy court), click **Create**. The West CiteAdvisor Options Details page is displayed.
2. Type a name for the option settings in the text box.
3. Choose a default jurisdiction from the *Default Jurisdiction* drop-down list to help identify citations.
4. Select the check box preceding one or more types of coverage: **Caselaw**, **Statutes**, **Administrative Decisions**, **Regulations**, **Court Rules**, and **Law Reviews and Bar Journals**.
5. Set the Citation Format Advisor options and the Table of Authorities Builder options and then click **Save**.

Figure 3. Options Details page