



# WEST CITEADVISOR USER MANUAL

SOFTWARE VERSION

OCTOBER 2010



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SOFTWARE VERSION

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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 October 2010.

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# 1 Introduction to West CiteAdvisor

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## What Is West CiteAdvisor?

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

West CiteAdvisor

- identifies legal citations (cases, statutes, court rules, regulations, constitutions, administrative decisions, and journal and law review articles) in the user's Microsoft Word or Corel WordPerfect document.
- suggests citations from *The Bluebook: A Uniform System of Citation*, the *ALWD Citation Manual*, or a citation style for 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.

The new software version of West CiteAdvisor includes

- compatibility with document management systems (DMS).
- compatibility with Microsoft Word and Corel WordPerfect.
- local citation checking (you can choose to send only the citations from your document, rather than the entire document).
- the West Solutions Framework interface, which makes using, managing, and accessing West Solutions products easier.

## Features Available in West CiteAdvisor

West 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; West CiteAdvisor scans your document and suggests formatting changes you can accept or reject.

## Accessing West CiteAdvisor

Download West CiteAdvisor at the 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.

## System Requirements

- **Operating system:** Windows 7, Windows Vista 32-bit or 64-bit, Windows XP Professional, or Windows 2000 (Service Pack 4 or later)
- **Browser:** Microsoft Internet Explorer 6.0 or later (Windows only, not Macintosh)
- **Additional Software:** Microsoft .NET Framework 2.0 or later and Microsoft Office 2010, 2007, 2003, 2002, or 2000 or one of the following WordPerfect versions:
  - WordPerfect X5
  - 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)
- **Processor:** PC with 600 MHz processor or faster (Intel Pentium/Caleron family or AMD K6/Athion/Duron family)
- Internet connection
- **Memory (RAM):** At least 256 MB of available RAM
- **Hard disk space:** 2 GB

**Note** This guide documents the use of West CiteAdvisor with Word 2007, Word 2003, and WordPerfect X3. Screen shots are taken from Word 2007.



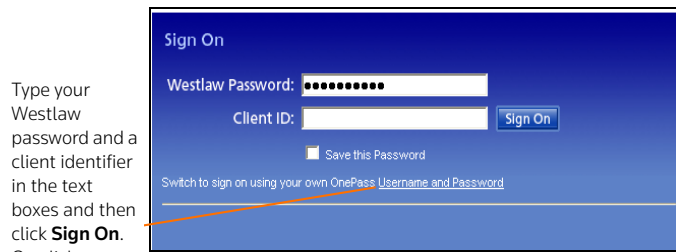
## 2 Using West CiteAdvisor

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## 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 appropriate text boxes and click **Sign On**. Or, click **Username and Password** to use your OnePass account information.
5. If the West CiteAdvisor home page is not displayed in the left frame, (see Figure 2-2 on page 7), access West CiteAdvisor by choosing **West CiteAdvisor** from the *Select Product* drop-down list. If the Westlaw sign-on page is displayed again, see step 4.



Type your Westlaw password and a client identifier in the text boxes and then click **Sign On**. Or, click

**Username and Password** to sign on using your OnePass account.

Figure 2-1. West CiteAdvisor sign-on dialog box

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**.
8. Select your citation recognition preference under *Cite Recognition*. Select **Submit Entire Document** to send your entire document to a West server for processing or select **Submit Citations Only** to submit only the citations from your 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 and select the **Table of Authorities Builder** check box to create a table of authorities (see "Using the Table of Authorities Builder" on page 8). It is considered best practice to use the Citation Format Advisor and the Table of Authorities Builder together.

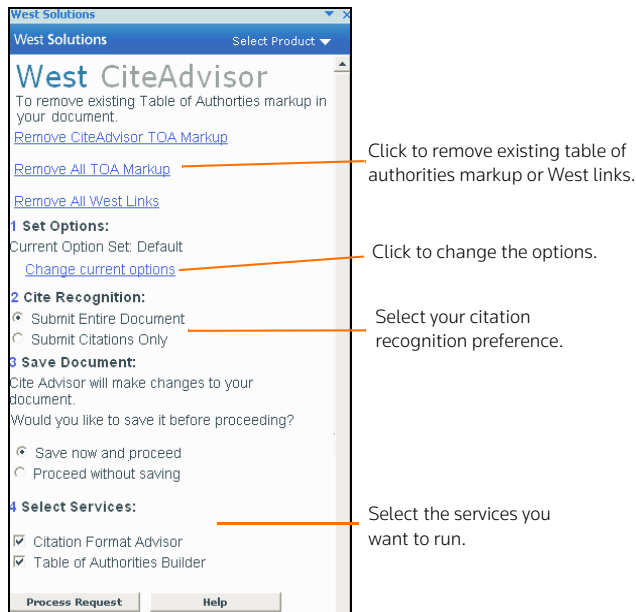


Figure 2-2. West CiteAdvisor home page

11. Click **Process Request**. The first citation that is recognized is highlighted 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 in your document and click **Accept Change**. See Figure 2-3 on page 8. You can only edit the citation range if you accept the citation.
12. The West 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** You cannot directly edit a suggestion in the *Suggestion* text box. You can, however, edit your document while processing suggestions. This allows you to take what you like from a suggestion and ignore what you don't like. After editing your document, click **Ignore Suggestion** to ensure that the citation will be included in the table of authorities.

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

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

**Note** Billing starts at the first suggestion.

Recognized citations appear here.

Click to accept the suggestion.

Click to edit the citation boundaries.

Click if the citation is not valid.

The West CiteAdvisor suggestion is displayed here.

review may be denied on a discretionary basis does not make the agency's action any less the voice of the state for purposes of Supreme Court's jurisdiction or for purposes of federal-state comity. ([Pac. Mr. Justice Rehnquist, as Circuit Justice](#)).

**\*1301 \*\*1** Mr. Justice REHNQUIST, Circuit Justice.

[\[1\]](#) Applicants request that I continue in effect a temporary injunction issued by the Court of Appeals for the Ninth Circuit on April 2, 1979, pending disposition by the full Court of their petitions for certiorari to review the judgment of the Court of Appeals. On July 18, that court, in a consolidated case in which both applicants were **\*\*2** appellants, affirmed the judgment of the United States District Court for the Northern District of California denying applicants injunctive relief **\*1302** against the enforcement of a rate order earlier promulgated by respondent California Public Utility Commission (PUC). The PUC in September 1977 (Decision No. 87838), had ordered applicants to refund charges paid by subscribers before 1978 and to reduce certain of their rates for that and future years. The PUC, however, stayed implementation of its order pending judicial review. [Pac. Tel. & Tel. Co. v. Pub. Utilities Comm'n of State of Cal., 600 F.2d 1309, 1311 \(9th Cir., 1979\)](#).

After the Supreme Court of California denied applicants' request for review, applicants petitioned this Court for certiorari. Applicants argued that this Court should review the PUC rate order because it was premised on the PUC's interpretation of an unsettled question of federal tax law. They claimed that if this interpretation subsequently proved incorrect, they would be subject to substantial liability in back taxes. Applicant Pacific Telephone also challenged the PUC's decision on the ground that it violated the Due Process Clause of the Fourteenth Amendment. The petitions were denied on December 11, 1978, [439 U.S. 1052, 99 S.Ct. 734, 58 L.Ed.2d 713](#), with Mr. Justice MARSHALL and Mr. Justice BLACKMUN dissenting from the order of denial. Petitions for rehearing were thereafter denied on February 21, 1979, [440 U.S. 931, 99 S.Ct. 1270, 59 L.Ed.2d 488](#). On March 14, 1979, the PUC terminated the stay of its own order of September 13, 1977 stating in its order so doing that "the avenues of judicial review have been exhausted." [Pac. Tel. & Tel. Co. v. Pub. Utilities Comm'n of State of Cal., 600 F.2d at 1311](#). The following day, applicants filed a complaint for declaratory and injunctive relief in the United States District Court for the Northern District of California. That court denied relief, but the Court of Appeals granted its own temporary injunction on April 2, 1979, pending consideration of applicants' appeal from the order of the District Court. Last month, as previously noted in this opinion, the Court of Appeals affirmed the judgment of the District Court, dissolved its own injunction, and denied applicants' request for a stay of mandate in order that they might petition this Court for certiorari.

Statute publication dates included in your document will be added to CiteAdvisor suggestions. If there is not a statute date in the citation in your document, CiteAdvisor will not add a date to the suggestion.

If you have included a pinpoint page number in the text of your document, CiteAdvisor will recognize it and include in the suggestion. However, CiteAdvisor cannot generate pinpoint page numbers.

Figure 2-3. Sample suggestion page

**Notes** Statute publication dates included in your document will be added to West CiteAdvisor suggestions. If the statute citation in your document does not include a date, West CiteAdvisor will not add a date to the suggestion.

If you have included a pinpoint page number in the text of your document, West CiteAdvisor will recognize it and include it in the suggestion. However, West CiteAdvisor cannot generate pinpoint page numbers.

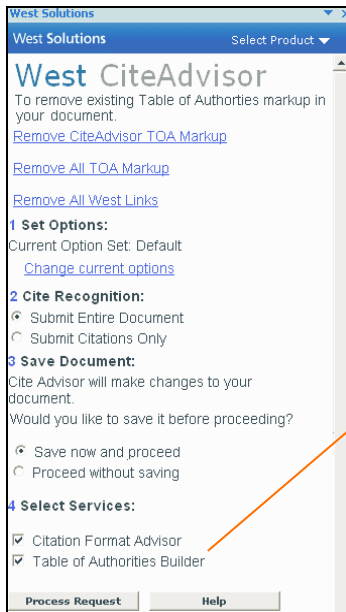
## Using the Table of Authorities Builder

1. Open the legal document in which you want to create a table of authorities in Word or WordPerfect.
2. Open West CiteAdvisor and sign on if necessary (see steps 2–5 on page 6).
3. At the home page, select the **Table of Authorities Builder** check box (see Figure 2-4 on page 9).
4. Click **Process Request**. The Inserting your TOA page is displayed in the left frame (see Figure 2-5 on page 9).

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

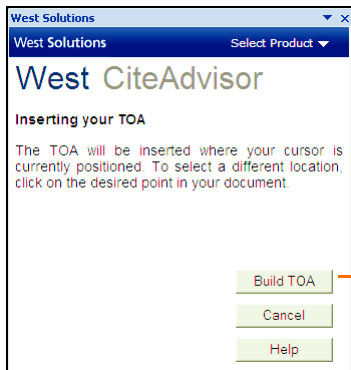
5. Click **Build TOA**. The table of authorities is inserted at your cursor location and the sign-on page is displayed in the left frame.

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



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

Figure 2-4. West CiteAdvisor home page with the *Table of Authorities Builder* check box selected



Click to build your TOA at the cursor location.

Figure 2-5. Inserting your TOA Page

## Setting West CiteAdvisor Options

### WORKING WITH OPTION SETS

#### Creating a New Option Set

1. To create a new option set (e.g., Bankruptcy court), click **Change current options** at the home page. The West CiteAdvisor Options Entry dialog box is displayed (see Figure 2-6 on page 10).

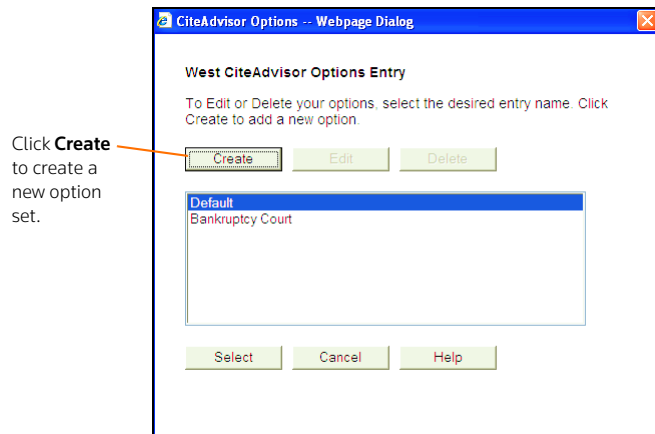


Figure 2-6. West CiteAdvisor Options Entry dialog box

2. Click **Create**. The West CiteAdvisor Options Details page is displayed (see Figure 2-7 on page 11).
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 in “Selecting Citation Format Advisor Options” on page 11 and “Selecting Table of Authorities Builder Options” on page 12.
7. Click **Save**.

#### Editing an Option Set

To edit an option set, complete these steps:

1. Select the option set from the list in the West CiteAdvisor Options Entry dialog box (see Figure 2-6) and then click **Edit**. The West CiteAdvisor Options Details page is displayed (Figure 2-7 on page 11).
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.

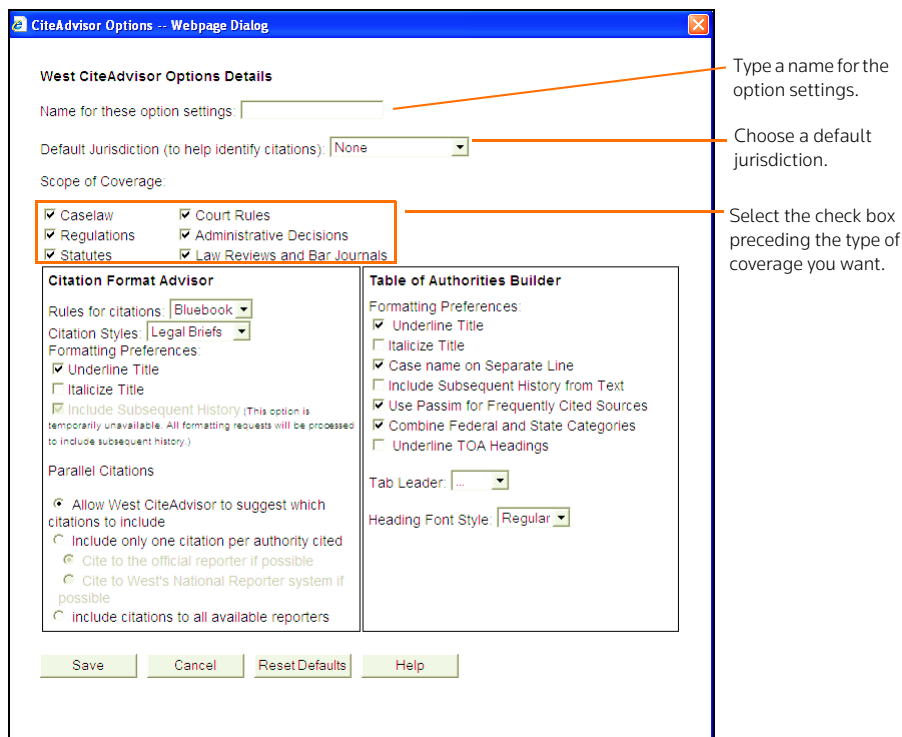
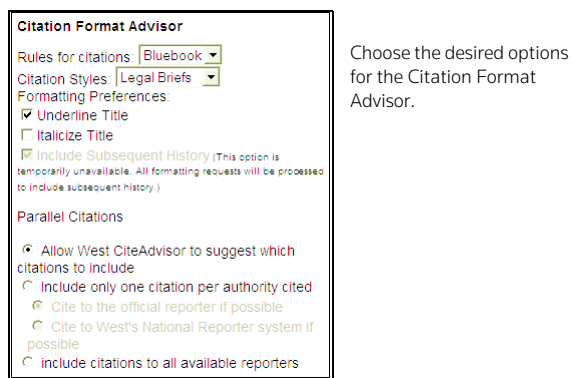


Figure 2-7. West CiteAdvisor Options Details page

## SELECTING CITATION FORMAT ADVISOR OPTIONS

Figure 2-8 shows the available options for the Citation Format Advisor on the West CiteAdvisor Options Details page.



Choose the desired options for the Citation Format Advisor.

Figure 2-8. Citation Format Advisor options

1. Choose the desired citation rules from the *Rules for citations* drop-down list: Bluebook, ALWD, California, New York, Florida, Kentucky, Michigan, Texas, or Illinois.

2. Choose the desired citation style from the *Citation Styles* 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**.
4. Under *Parallel Citations*, select one of the following:
  - **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 2-9 shows the available options for the Table of Authorities Builder on the West CiteAdvisor Options Details page.

**Table of Authorities Builder**

Formatting Preferences:

- Underline Title
- Italicize Title
- Case name on Separate Line
- Include Subsequent History from Text
- Use Passim for Frequently Cited Sources
- Combine Federal and State Categories
- Underline TOA Headings

Tab Leader:

Heading Font Style:

Select the desired options for the Table of Authorities Builder.

Figure 2-9. 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 federal and state 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**.





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