

Using WestCheck 5.0

WestCheck is West's automated citation-checking software that verifies citations extracted from a legal document or in a citations list you create manually. Install WestCheck as an integrated application, as a stand-alone application, or both.

- The WestCheck integrated application is integrated with your word-processing program. You access the application via a word-processing document.
- The WestCheck stand-alone application runs in its own interface.

You can check your citations in KeyCite®; create a Cited Decisions list of cases cited by your case; use QuoteRight to verify the accuracy of quotations in your document; and use the Find service to retrieve the documents on Westlaw®. This can be important when—sometimes at the eleventh hour—you need to verify that all the citations in a lengthy memorandum are correct and that the cited authorities are good law.

WestCheck 5.0, the latest version, installs into West Solutions Framework—the new interface that makes using, managing, and accessing West Solutions products easier than ever.

Download the software and view system requirements at <http://west.thomson.com/software/westcheck/default.aspx>.

Starting WestCheck and Creating a Citations List

IN THE INTEGRATED APPLICATION

1. Open the legal document you want to check in WestCheck in Microsoft® Word or Corel® WordPerfect®.
2. Click the **West Solutions** tab or button on the toolbar.
3. If the Westlaw Sign-On dialog box 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.
4. Choose **WestCheck** from the West Solutions *Select Product* drop-down list or click the **WestCheck** button on the toolbar.

Note If the Cite Recognition dialog box is displayed in the left frame, select either **Submit Entire Document** or **Submit Citations Only**. Then click **Enter**.

WestCheck automatically extracts the citations from your document to create a citations list, which is displayed in the left frame (see Figure 1).

IN THE STAND-ALONE APPLICATION

1. Double-click the WestCheck icon on your desktop or choose **Programs, Thomson West, WestCheck, WestCheck** from the Start menu.
2. In the Welcome to WestCheck dialog box, select **Extract Cites from a Document**, then click **OK**.
3. In the Open dialog box, select the document from which you want to extract citations, then click **Open**.
4. If the Westlaw Sign-On dialog box 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.

WestCheck automatically extracts the citations from your document to create a citations list.

For assistance using WestCheck, call **1-800-WESTLAW** (1-800-937-8529).

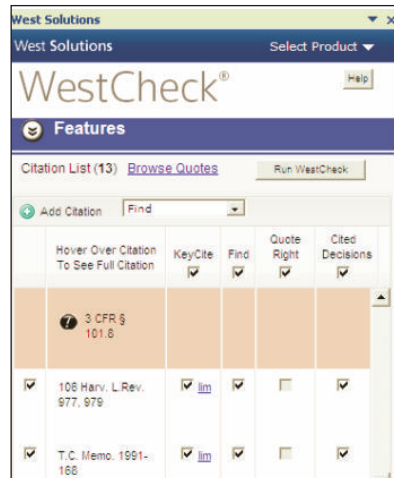
For free reference materials, visit west.thomson.com/westlaw/guides.

MANUALLY CREATING A CITATIONS LIST IN THE STAND-ALONE APPLICATION

1. In the Welcome to WestCheck dialog box, select **Create a New Cite List**. If WestCheck is currently running, choose **Create a New Citations List** from the File menu.
2. Type or paste your citations in the Create a New Cite List dialog box.
3. Click **OK**.

CREATING A CITATIONS LIST FROM A DOCUMENT SAVED IN A DMS IN THE STAND-ALONE APPLICATION

Note You must have a DMS client installed in your computer.



In the Welcome to WestCheck dialog box, select **Extract Cites from a Document**, then click **OK**. If WestCheck is currently running, choose **Extract from a DMS Document** from the File menu.

WestCheck extracts the citations from your document.

Checking the Citations in Your Citations List

You can check your citations in WestCheck using the KeyCite, Find, QuoteRight, and Cited Decisions services.

1. To check individual citations in the citations list, select the check box next to each citation under the service in which you want to check the citation. To check the entire citations list in the same service or services, select the check box under the column heading (e.g., **KeyCite**).

Figure 1. Citations list

Note To exclude a citation from being checked, clear the

check box preceding the citation you want to exclude.

2. To apply a preset service to the citations in your list (e.g., KeyCite History), choose a preset service from the *Select Preset* drop-down list. For more information on setting up your preset services, see *Customizing Your Preset Services* in the *WestCheck User Manual*.
3. Click **Run WestCheck**. The WestCheck Delivery dialog box is displayed.
4. Under *Select a report option*, select **Online report display** to view the report online. The report will be displayed in a new browser window, from which you can save it or print it. When saving the report, make sure that **Webpage, complete (*.htm, *.html)** is selected in the *Save as type* drop-down list; the report will be saved in HTML format so you can open the report in your browser.
Choose **Offline report delivery** to send a report to a printer, e-mail address, or fax machine. Choose the desired delivery destination from the *Destination* drop-down list. If you choose **E-mail**, type the e-mail address to which you want the report sent in the *Email Address* text box. If you choose **E-mail** or **Download**, you must also choose a format from the *Format* drop-down list.
5. Under *For Find Results*, select the **Deliver Find results separately from the report** check box to have your Find requests delivered in separate documents. If you also select the **Create one file for all Find results** check box, all Find requests will be delivered in a single document (instead of in multiple documents).
6. Under *For Reporter Images*, select the **Substitute with Reporter images when available** check box to deliver PDF images of case law documents exactly as they appear in the West reporters. Select the **Create one PDF for all Reporter images** check box to deliver a single PDF image that contains all of the case law documents in the result.
7. Under *Sort Report By*, select the desired sort order. Select **Citation** to sort the report by citation or select **Services** to sort the report by the services run, then click **Run Report**.

Reading a KeyCite Result

The contents of the report depend on your KeyCite Limits settings. See “Limiting KeyCite Results” on page 4 for more information.

In offline text reports, KeyCite flags are represented by the terms Red Flg, Yel Flg, H, and C. For definitions of the KeyCite status flags and the depth of treatment stars, see “KeyCite Status Flags” and “KeyCite Depth of Treatment Stars” below.

Red Flg=Red Flag


Yel Flg=Yellow Flag


H=Blue H

C=Green C


KEYCITE STATUS FLAGS


The KeyCite status flags let you immediately know the status of a case, administrative decision, statute, or regulation.

 A red flag indicates that the case or administrative decision is no longer good law for at least one of the points of law it contains; or 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.

 A yellow flag indicates that the case or administrative decision has some negative history but hasn’t been reversed or overruled; 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.

Note A printed black and white report will display a yellow flag as empty or very lightly shaded, while a red flag will appear mostly shaded.

 A blue H indicates that the case or administrative decision has some history.

 A green C indicates that the case or administrative decision has citing references but no direct history or negative citing references or that the statute or regulation has citing references.

KEYCITE DEPTH OF TREATMENT STARS

KeyCite depth of treatment stars indicate the extent to which a citing case, administrative decision, or brief discusses the cited case.

★★★★ Examined

The citing case, administrative decision, or brief contains an extended discussion of the cited case, usually more than a printed page of text.

★★★ Discussed

The citing case, administrative decision, or brief contains a substantial discussion of the cited case, 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, usually less than a paragraph.

★ Mentioned

The citing case, administrative decision, or brief contains a brief reference to the cited case, usually in a string citation.

LIMITING KEYCITE RESULTS FOR CASE CITATIONS

1. In the integrated application, click **Features** in the left frame and then click **Set KeyCite Limits for All Citations**.

The KeyCite Limits dialog box is displayed with the Cases tab selected.

2. To choose the KeyCite history you want to view, select the **KeyCite History** check box and then choose one of the following options:

| | |
|---|---|
| Negative History Only | WestCheck retrieves only negative history for the case. |
| Show Full History (Including Court Documents) | WestCheck retrieves all history for the case, including citations for related court documents, such as petitions, motions, and pleadings. |
| Show Full History (Excluding Court Documents) | WestCheck retrieves all history for the case, but does not include citations for related court documents. |

3. To retrieve citing references, select the **KeyCite Citing References** check box. To restrict the citing references, click **Limit Citations**. The Citation List Details dialog box is displayed.
4. Select the restrictions you want to apply to the citing references.
5. Click **Apply Limits**, then click **OK** in the KeyCite Limits dialog box.

LIMITING KEYCITE RESULTS FOR STATUTE CITATIONS

1. In the integrated application, click **Features** in the left frame and then click **Set KeyCite Limits for All Citations**.

The KeyCite Limits dialog box is displayed.

2. Click the **Statutes** tab.
3. Select the **KeyCite History** check box to retrieve statutory history, including proposed legislation, credits, and statutory and historical notes.
4. To retrieve citing references, select the **KeyCite Citing References** check box. To restrict the citing references, click **Limit Citations**. The Citation List Details dialog box is displayed.
5. Select the restrictions you want to apply to the citing references.
6. Click **Apply Limits**, then click **OK** in the KeyCite Limits dialog box.

Reading Cited Decisions, Find, and QuoteRight Results

For information on reading Cited Decisions, Find, and QuoteRight results, see Chapter 3, "Using WestCheck" in the *WestCheck User Manual*, available for downloading at

<http://west.thomson.com/support/user-guide/west-check.aspx>

