

WEST KM FOR TRANSACTIONS

USER GUIDE

VERSION 4.6.1



THOMSON REUTERS™

WEST KM FOR TRANSACTIONS

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Reference Materials

To browse free West km reference materials, visit west.thomson.com/westkm/guides.aspx. West km and other West products also contain online Help.

About This Guide

West continues to develop new features and improve existing features for this product. Because of these improvements and the evolving nature of Internet technology, there may be recent changes to the West km interface and functionality that are not reflected in this documentation.

Depending on the West km package purchased by your organization, some features described in this guide may not be available.

Information in this guide is current through April 2010 (version 4.6.1).

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1 Welcome to West km for Transactions

West km for Transactions allows you to search internal transactional documents, such as agreements and contracts to easily find and reuse your organization's best work. You can search in your Web browser, and, if West BriefTools is installed, alongside your word processor.

Features

West km for Transactions allows you to

- search your organization's transactional documents.
- restrict the number of documents in a result to more easily pinpoint those that are the most pertinent.
- view summary information to help you decide if a transactional document meets your needs.
- view comments and other feedback about your organization's documents that have been added by colleagues with annotator rights. (For details about annotating documents, see the *West km Indexing and Administration* guide.)
- print and e-mail transactional documents.
- copy text from your organization's transactional documents and paste it into your draft word-processing documents if West BriefTools is installed.


Requirements

Your administrator will index the appropriate documents at your organization so they can be used with West km for Transactions. After this index processing is complete, you can use West km for Transactions. Here are the requirements:

- Your computer must meet the hardware and software requirements as outlined in the client configuration section on the West km System Requirements Web page. You can access this page by going to www.westkm.com and clicking **System Requirements**.
- You may need a West km username and password. Your administrator will provide you with this information if it's required. You will be prompted for it when accessing West km content from your Web browser or word processor.
- You must be designated an active West km member by your administrator.

Getting Help

Online help is available in West km for Transactions to assist you with your research.

- For general help information, click **Help** at the top of any West km page.
- For help on a specific task, click **Help** or the **Help** icon () when it appears next to a feature.
- For help with West km Transactions in West BriefTools, click **Help** in the West Solutions window.

Accessing West km

You can retrieve documents that are indexed in West km for Transactions via the West km interface.

To access the West km interface, complete these steps:

1. Open Internet Explorer and go to *hostname/km/pldefault.aspx*, where *hostname* is the name by which your West km server is known on your network. If you don't know the name of your West km server, your administrator can provide it.
2. If you are prompted, type the ID for the client or matter to which your research pertains in the *Client ID* text box and click **Go**. (If you need to change the client ID during your research session, click **Change Client ID** at the top of the page.)
3. Click the **Transactions** tab.

Note In the West km interface, you can also access the Westlaw Business product by clicking **Westlaw Business** at the top of the page.

Working with Documents

Before you begin working in West km for Transactions, it is helpful to understand the origin of the documents, clauses, and defined terms you will retrieve.

Transactional files at your organization are stored in a document management system (DMS) in their original format, e.g., Microsoft Word. West km for Transactions analyzes the original DMS file and extracts and tags significant content. The content it generates is used to create document, clause, and defined term content collections that are easier for you to search and browse.

- A *document* corresponds to the original DMS file. A document may contain multiple legal instruments, e.g., *agreement, exhibit, annex, schedule*. These are groupings of related clauses and defined terms.
- A *clause* is a group of words within a document describing a transactional category or relationship, e.g., *partner liability* or *civil litigation*. A clause may contain subclauses and parts referred to as clause text, e.g., *breach, collateral, equipment lease, or lien*.
- A *defined term* is a word or phrase that has a particular meaning in the context of the document, e.g., *seller, borrower, foreign lender, or loan account*.

Keep in mind that when you e-mail or load a copy of a document, clause, or defined term, you are actually e-mailing or loading the original DMS file, e.g., the Microsoft Word file.

Comments and exemplar markings that have been added by a colleague with annotator rights are attached to the document. They are viewable from the document, as well as from all clauses and defined terms originating from the document.

During indexing of the original DMS file, West km also generates and gathers document metadata.

- Metadata such as document title, party names, law firms, governing law, and execution date is generated during document analysis.
- Metadata such as file title, author, created and modified date, and client and matter information is gathered from your organization's DMS.

Both of these types of metadata are searchable and displayed in search results and summaries.

2 Searching for Documents

Using West km for Transactions, you can easily search for documents, clauses, and defined terms.

Running a Search

To search for content in the West km interface, complete these steps:

1. Click the **Search Documents**, **Search Clauses**, or **Search Defined Terms** tab at the top of the page, depending on the content you want to retrieve (Figure 2-1).
2. Type your search terms in the *Title* or *Text* text boxes, depending on whether you want to search by text, title, or both. Use connectors to specify relationships between the terms in a text box, e.g., **purchase /5 agreement**. For details, see “Using Connectors and Special Characters in Your Searches” on page 4.
3. If you are searching by title and want West km to automatically add root expanders, synonyms, and related concepts to your search terms, select the **Use Fuzzy Logic** check box. Selecting this option retrieves additional documents, clauses, or defined terms that may be a match for your search criteria.

For example, if you type **acquire** in the *Title* text box and select this option, West km for Transactions retrieves documents whose titles contain any form of *acquire*, such as *acquires* or *acquisition*, synonyms such as *get*, and related concepts such as *purchase* and *merge*.

4. You can restrict all or part of your search to specific fields (types of data) by entering criteria on the Fields panel. For example, you might want to restrict your search to documents written by a single author. For details, see “Using Field Restrictions” on page 6.
5. You can restrict your search to particular library groups by selecting options on the Library Group panel. For example, you might want to restrict your search to documents in particular office locations or practice areas. For details, see “Selecting Library Groups” on page 9.
6. Click **Search**.



Click a search tab, type your terms in the *Title* or *Text* text boxes, and then click **Search**.

Figure 2-1. The Search Documents tab

Using Connectors and Special Characters in Your Searches

By default, the *and* connector is used between terms. For example, type **partner liability** to retrieve transactional documents that contain both of the terms *partner* and *liability*.

You can also use other connectors and special characters to change relationships between your search terms and retrieve variations of search terms.

Note If you select the *Use Fuzzy Logic* check box on a Search tab, using connectors and special characters in a title search may prevent concept searching from retrieving additional documents, clauses, or defined terms that may be a match for your search criteria.

USING CONNECTORS

Use connectors to specify the relationships that must exist between the terms in your retrieved documents, clauses, or defined terms (Table 2-1). For example, type **purchase /5 agreement** to retrieve documents where *purchase* and *agreement* are within five terms of each other.

Table 2-1. Using connectors with search terms

Type:	To retrieve documents, clauses, or defined terms that contain:
& (and) (or a space)	Both search terms (default connector)
or	Either search term or both terms
/p	Search terms in the same paragraph
/s	Search terms in the same sentence (i.e., within 30 terms)
+s	The first search term preceding the second within the same sentence (i.e., within 30 terms)
/n	Search terms within <i>n</i> terms of each other (where <i>n</i> is a number from 1 to 255)
+n	The first search term preceding the second within <i>n</i> terms (where <i>n</i> is a number from 1 to 255)
“ ”	Search terms appearing in the same order as in the quotation marks
Type:	To exclude documents, clauses, or defined terms that contain:
% (but not)	The terms following the percent symbol

USING SPECIAL CHARACTERS

Type the universal character (*) to represent one variable character. Type the root expander (!) to retrieve words with variant endings (Table 2-2).

Table 2-2. Using the universal character and root expander

Type:	To retrieve:
licens**	license licensee licenser licensor
distribut!	distribute distributed distribution distributing

Note Plurals and possessive forms are automatically retrieved without a root expander.

SEARCHING FOR COMPOUND WORDS AND ABBREVIATIONS

If your search term is a compound word, use its hyphenated form to retrieve all variations. If your search term is an abbreviation, type it with periods and without spaces to retrieve all variations (Table 2-3).

Table 2-3. Retrieving compound words and abbreviations

Type:	To retrieve:
good-will	goodwill good-will good will
u.c.c.	UCC U.C.C. U. C. C. U C C

TURNING OFF AUTOMATIC PLURALS AND EQUIVALENT TERMS

By default, searches retrieve plural forms and equivalent terms. To only find the exact term you specify in the search, type the # symbol in front of the term (Table 2-4).

Table 2-4. Turning off searching for plural forms and equivalent terms

Type:	To retrieve:
#damage	<i>damage</i> but not <i>damages</i>
#willful	<i>willful</i> but not <i>wilful</i>

Using Field Restrictions

When searching your organization’s content, you can restrict all or part of your search to specific fields (types of data). You do this by using the Fields panel on a Search tab or by adding field restrictions to your query.

USING THE FIELDS PANEL

To restrict your search using the Fields panel, complete these steps (Figure 2-2):

1. On a Search tab, click the **Fields** panel to open it.
2. Type information in one or more fields to add the field criteria to the search. You can enter as much or as little information as you know.

By default, the *and* connector is used to connect field criteria on the Fields panel.

The screenshot shows the 'Fields' panel with the following sections:

- Document Fields:** Clause Title, Defined Term Title, Attorneys, Governing Law (new york), Law Firm, Parties.
- West km Fields:** Comments, Exemplar Document, Exemplar Form, Results with Comments.
- Profile Fields:** Abstract, Author, Client ID, Client Name, Created Date (No date restriction), DMS Doc Type, DMS Number, File Name, Matter ID, Matter Name, Modified Date (No date restriction), Practice Area, Sub-document Type.

Figure 2-2. The Fields panel

ADDING FIELD RESTRICTIONS TO YOUR QUERY

As an alternative to using the Fields panel, you can restrict your search by adding field restrictions to a full-text search (i.e., a search using the *Text* text box on the Documents, Clauses, or Defined Terms tab). This method allows you to use field restrictions with special characters and connectors other than *and* between fields.

Field restrictions are available for title fields (Table 2-5), document analysis fields (Table 2-6), Profile fields (Table 2-7), and other West km fields (Table 2-8). The availability of Profile fields depends on your organization’s metadata.

Table 2-5. Title field restrictions

Field	Abbreviation	Example
Document Title	docti	docti(purchase /5 agreement)
Clause Title	clti	clti("partner liability")
Defined Term Title	dtti	dtti(seller)

Table 2-6. Document analysis field restrictions

Field	Abbreviation	Example
Attorney	at	at(john /3 smith)
Law Firm	lf	lf(peterson /5 office)
Governing Law ¹	gl	gl(california)
Parties	par	par(citran & cornell)

1. Depending on the data from your organization's DMS, the Governing Law field can contain different variations of a jurisdiction name, such as California, State of California, or CA. When you sort result lists by this field, variations can cause results from the same jurisdiction to be grouped separately (e.g., *California* before *State of California*).

Table 2-7. Profile field restrictions

Field	Abbreviation	Example
Abstract	abst	abst(purchase /5 agreement)
Author	au	au(john /3 maxwell)
Client ID	cid	cid(1587)
Client Name	cn	cn(smith)
Matter ID	mi	mi(2228)
Matter Name	mn	mn(merger)
Client-Matter ID	cmid	cmid(1587-2228)
Client-Matter Name	cmn	cmn(smith & merger)
Created Date ¹	cd	<i>specific date:</i> cd(1/14/2007) <i>specific month:</i> cd(1/2007) <i>specific year:</i> cd(2007) <i>after:</i> cd(aft 1/14/2007) cd(aft 1/2007) <i>before:</i> cd(bef 1/30/2007) cd(bef 2007) <i>after & before:</i> cd(aft 2003 & bef 2007)

Table 2-7. Profile field restrictions (continued)

Field	Abbreviation	Example
Modified Date ¹	md	<i>specific date:</i> md(1/14/2007)
		<i>specific month:</i> md(1/2007)
		<i>specific year:</i> md(2007)
		<i>after:</i> md(aft 1/14/2007) md(aft 1/2007)
		<i>before:</i> md(bef 1/30/2007) md(bef 2007)
		<i>after & before:</i> md(aft 2003 & bef 2007)
DMS Doc Type	dt	dt(contract)
File Name	ti	ti(nevada & blueson)
DMS Number	dn	dn(32027)
Custom 1 ²	cus1	cus1(real /2 estate)
Custom 2	cus2	cus2(lease)
Custom 3	cus3	cus3("form-agrmt-trans")

1. The Created Date and Modified Date fields are not inclusive when used to search a range of documents. For example, if you search for documents created after 1/2007, no documents created in January 2007 are retrieved.

To simultaneously search by created date and modified date, the Date (da) field can be used. For example, to retrieve documents that were created on 1/14/2007 or modified on 1/14/2007, add **da(1/14/2007)** to your query.

2. The data in custom fields depends on the DMS fields that your administrator has mapped. The examples shown assume Custom 1 is mapped to a practice area field, Custom 2 is mapped to a document sub-type field, and Custom 3 is mapped to a form type field.

Table 2-8. West km field restrictions

Field	Abbreviation	Value Type	Example
Comments	annos	text	annos(power +3 attorney)
Results with Comments	com	true = has comments	com(true)
		false = has no comments	
Exemplar Documents and Exemplar Forms	exem	0 = no marking	exem(1)
		1 = exemplar document marking	
		2 = exemplar form marking	
Library Group	lg	text	lg("NY office")

Selecting Library Groups

When searching your organization's content, you can restrict your search to particular library groups, such as office locations or practice areas. You do this by selecting options on the Library Group panel.

To restrict your search using the Library Group panel, complete these steps (Figure 2-3):

1. On a Search tab, click the **Library Group** panel to open it.
2. Select or clear the library group check boxes to include or exclude them from the search.



Select or clear the library group check boxes to include or exclude them from the search.

Figure 2-3. The Library Group panel

3 Browsing Retrieved Documents

Documents, clauses, and defined terms retrieved by your search are displayed in the result list.

Viewing a Result List

Items in a result list (i.e., documents, clauses, or defined terms) are displayed in order of relevance or in reverse chronological order by modified date, depending on the settings at your organization.

When the result list has more than 20 items, click the **Next** arrow to view additional items.

For each item in a search result, the first three search terms are shown in the result list with surrounding document text and the search terms are highlighted in yellow (Figure 3-1).

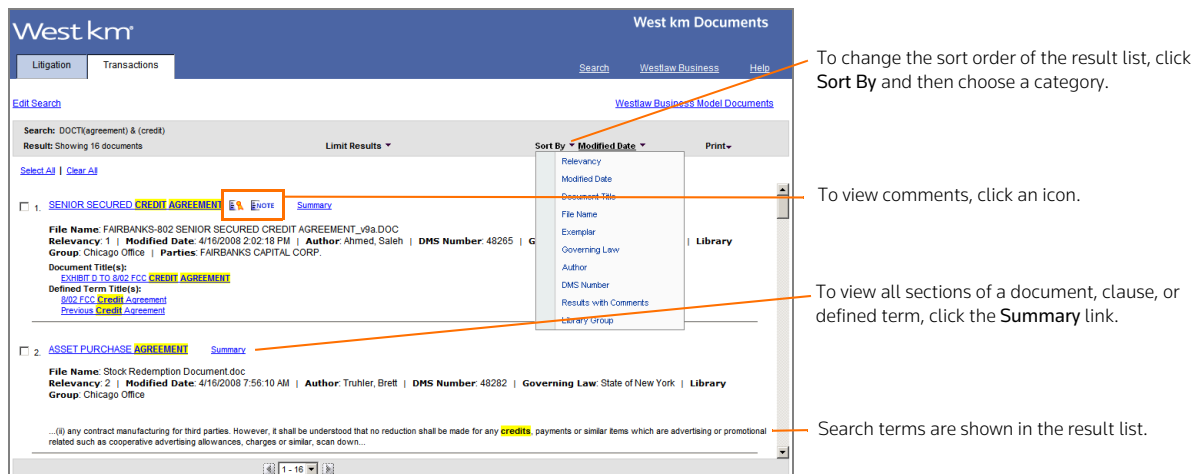


Figure 3-1. A result list

From the result list you can perform these tasks:

- To view the full text of a document, clause, or defined term, click its title. For details, see “Viewing a Document, Clause, or Defined Term” on page 15.
- To view all sections of a document, clause, or defined term, click the **Summary** link. For details, see “Viewing a Summary” on page 17.
- To view comments about the document that were added by a colleague with annotator rights, click the **Note** icon ().
- An Exemplar icon (or) in the result list indicates that the document has been flagged as a model example by a colleague with annotator rights. You may want to use this document to draft new documents of the same type.
- To change your search, click **Edit Search** at the top of the result list.

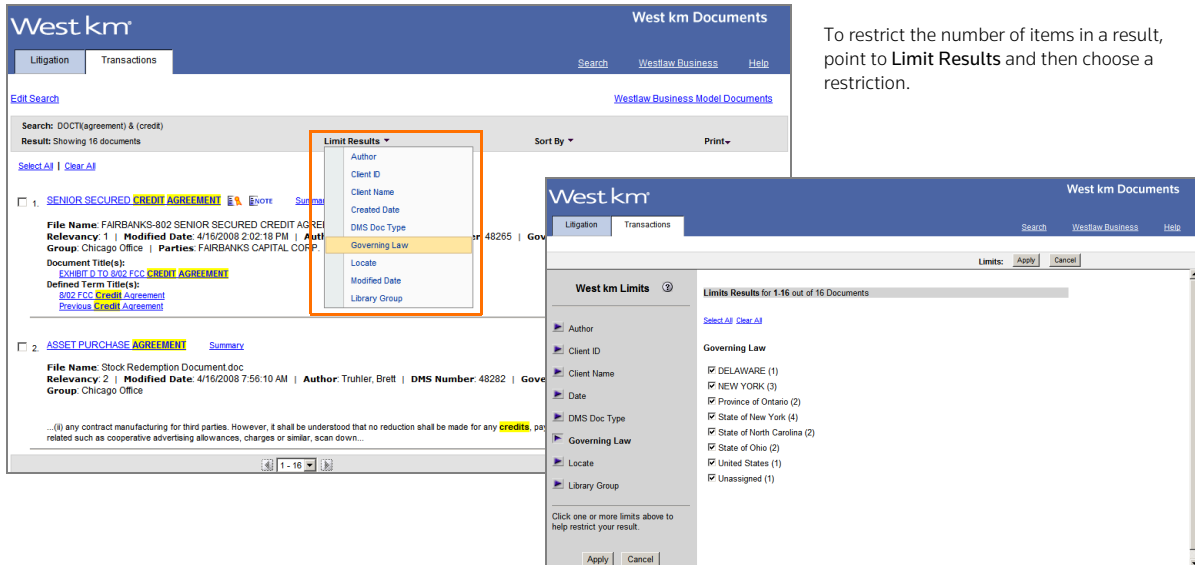
- To change the sort order of documents, clauses, or defined terms, click **Sort By** at the top of the result list, and then choose a category.
- To print the result list, click **Print** at the top of the page and then click **Result List**. To print documents from the result list, select the check box next to one or more titles, click **Print**, and then click **Selected Documents**. For details, see “Printing Documents, Clauses, or Defined Terms” on page 18.

LIMITING A RESULT LIST

Your search result may retrieve a large number of your organization’s documents, clauses, or defined terms. You can restrict the size of the result to more easily pinpoint the items that are the most pertinent.

To restrict the number of documents, clauses, or defined terms in a result, complete these steps:

1. Point to **Limit Results** at the top of the result list and then choose a restriction (e.g., **Governing Law**). The Limits page is displayed (Figure 3-2).



To restrict the number of items in a result, point to **Limit Results** and then choose a restriction.

Figure 3-2. The Limits page

2. In the right frame, specify the options you want to use to restrict the result.

Numbers after each item represent the number of documents, clauses, or defined terms in the result pertaining to the item. For example, numbers after each author name represent the number of documents in the result that are authored by that person.

Note To improve performance for large result lists, West km for Transactions initially processes a subset of the result list to produce the counts and the items you can select for the restrictions. To process the next set of results, update the counts, and show additional items you can select for a restriction, click **Next**.

3. If desired, click an arrow in the left frame to specify another restriction. Depending on your West km configuration, the restrictions listed in Table 3-1 below may be available to you.

- To restrict your result to documents, clauses, or defined terms that contain particular terms, whether or not the terms appear in your original query, use the Locate restriction. In the *Locate Query* text box, type a Terms and Connectors query (see pages 4–5). Your query can include field restrictions, such as **au(john /3 maxwell)**. For a list of field restrictions that may be available to you, see Table 2-5 on page 6.

Note If you don't add field restrictions, the search runs on the full text.

- Click **Apply**. The result is displayed with the restrictions you specified.

If you used the Locate restriction, Locate terms are highlighted in yellow. Use Term arrows to view the next or previous term in your Locate result.

To modify your restrictions, point to **Edit Limits**, and then choose the first restriction you want to modify. Change your restrictions and click **Apply**.

To cancel your restrictions and display the list of all documents in the original result, do one of the following:

- From the West km Limits page, click **Cancel**.
- From a result, point to **Edit Limits**, and then choose **Cancel Limits**.

Table 3-1. Limit restrictions

Restriction	Description
Author	Find documents written by specific persons in your organization.
Client ID	Find documents that pertain to specific client IDs.
Client Name	Find documents that pertain to specific client names.
Client-Matter ID	Find documents that pertain to specific client-matter IDs.
Client-Matter Name	Find documents that pertain to specific client-matter names.
Date	Find documents based on the date the documents were created or modified.
DMS Doc Type	Find specific document types (e.g., a brief or memo).
Governing Law	Find documents in which the governing law matches a specific jurisdiction. Governing law assignments are made by West km during document analysis.
Library Group	Find documents that pertain to specific groups, such as office locations or practice areas, that your administrator has created.
Locate	Find documents that contain specific terms.
Matter ID	Find documents that pertain to specific matter IDs.
Matter Name	Find documents that pertain to specific matter names.
Exemplar	Find documents that have been marked as exemplar by a colleague with annotator rights.
Results with Comments	Find documents for which comments have been added by a colleague with annotator rights.

EXPANDING A SEARCH FROM A CLAUSE OR DEFINED TERM RESULT LIST

When you search for clauses or defined terms using the Search Clauses tab or Search Defined Terms tab, your result list consists of clauses or defined terms.

You can expand your search from this result list and retrieve a list of documents that may contain clauses or defined terms that were not in the original result list.

To expand your search for clauses or defined terms, click the **Expand Search** link (e.g., **Search for Clauses in Documents**) at the top of the clause or defined term result list (Figure 3-3).

The figure consists of two screenshots of the West km Documents interface. The left screenshot shows a search result for a clause. The search criteria are "CLT(Agreement) & (credit)". The result list shows three items. The first item is highlighted, and the "Expand Search" link is highlighted with a red box. The right screenshot shows the expanded search results for documents containing the clause. The search criteria are the same. The result list shows two documents. The first document is highlighted, and the "Return to Clause Search" link is visible at the top of the document result list.

To search for documents that may contain additional clauses or defined terms, click the **Expand Search** link (e.g., **Search for Clauses in Documents**).

Figure 3-3. An expanded search for clauses

For easy reference, documents containing clauses or defined terms that you clicked and viewed on the original result list are marked *Previously Viewed* after the title.

To return to the original result list, click the **Return to Search** link (e.g., **Return to Clause Search**) at the top of the document result list.

EXPANDING A SEARCH TO WESTLAW BUSINESS

From a result list in West km for Transactions, you can expand your search to the Precedent Authority database on Westlaw Business to retrieve model agreements, contracts, and documents filed with the SEC.

To expand your search on Westlaw Business, complete these steps:

1. Click the **Westlaw Business Model** link (e.g., **Westlaw Business Model Documents**) at the top of the result list (Figure 3-4).
2. Sign on to Westlaw Business, if necessary. The Precedent Authority search template on Westlaw Business is displayed and prepopulated with much of the search criteria you used in West km for Transactions (Figure 3-4).
3. Click **Search**.

The image shows two overlapping screenshots. The background screenshot is the West km interface. At the top, there are tabs for 'Litigation', 'Transactions', 'Vetting', and 'Setup'. Below these is a search bar with the text 'DOCT(Agreement) & (credit)'. A red box highlights a link labeled 'Westlaw Business Model Documents'. Below the search bar, there are two search results. The first result is titled 'SENIOR SECURED CREDIT AGREEMENT' and includes details like 'File Name: FAIRBANKS-802 SENIOR SECURED CREDIT AGREEMENT_y9a.DOC', 'Relevancy: 1', 'Modified Date: 4/16/2008 2:02:18 PM', 'Author: Ahmed, Saleh', and 'DMS Number: Chicago Office'. The second result is titled 'ASSET PURCHASE AGREEMENT' and includes details like 'File Name: Stock Redemption Document.doc', 'Relevancy: 2', 'Modified Date: 4/16/2008 7:56:10 AM', 'Author: Truhler, Brett', and 'DMS Number: Chicago Office'. The foreground screenshot is the Westlaw Business interface. It shows a search template for 'Precedent Agreements'. The search criteria are prepopulated with information from the West km search: 'Select Practice Area: All', 'Free Text Search: secured', 'Document Title: agreement', 'Clause Title: e.g. Exchange, Merger, Purchase', 'Defined Terms: e.g. Severability, "Tax Consequences"', 'Governing Law: e.g. Consideration, "Exchange Ratio", "Fair Market Value"', 'Attorney or Law Firm: Delaware, "New York"', 'Company Name:', and 'Ticker Symbol:'. A 'Search' button is visible at the bottom of the search template.

To expand your search for model documents on Westlaw Business, click the **Westlaw Business Model Documents** link.

Figure 3-4. An expanded search for model documents on Westlaw Business

Note Profile field restrictions and West km field restrictions in your West km search are removed from the Westlaw Business search.

Viewing a Document, Clause, or Defined Term

To view the full text of a document, clause, or defined term in the result list, click its title (Figure 3-5). The section of the text containing the first occurrence of your search terms is displayed in the right frame. Tasks such as printing and loading the corresponding DMS file are displayed in the left frame.

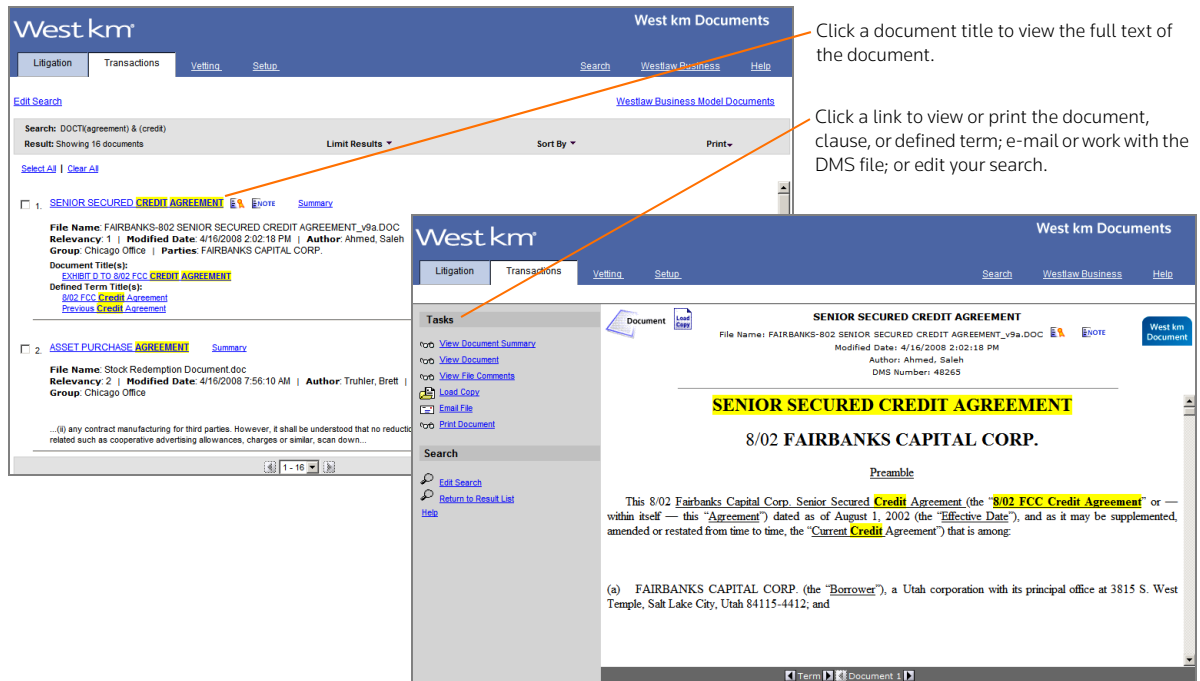


Figure 3-5. A transactional document retrieved by a search

BROWSING BY SEARCH TERM


Search terms are highlighted in the text. Click a **Term** arrow at the bottom of the page to view the next or previous term in your search result. When you search by title and the *Expand Title Searches* check box is selected, the entire title field, not just your search terms, is highlighted.



VIEWING THE NEXT OR PREVIOUS DOCUMENT, CLAUSE, OR DEFINED TERM

Click a **Document**, **Clause**, or **Defined Term** arrow at the bottom of the page to view the next or previous document, clause, or defined term, respectively, in your search result.

SELECTING TASKS

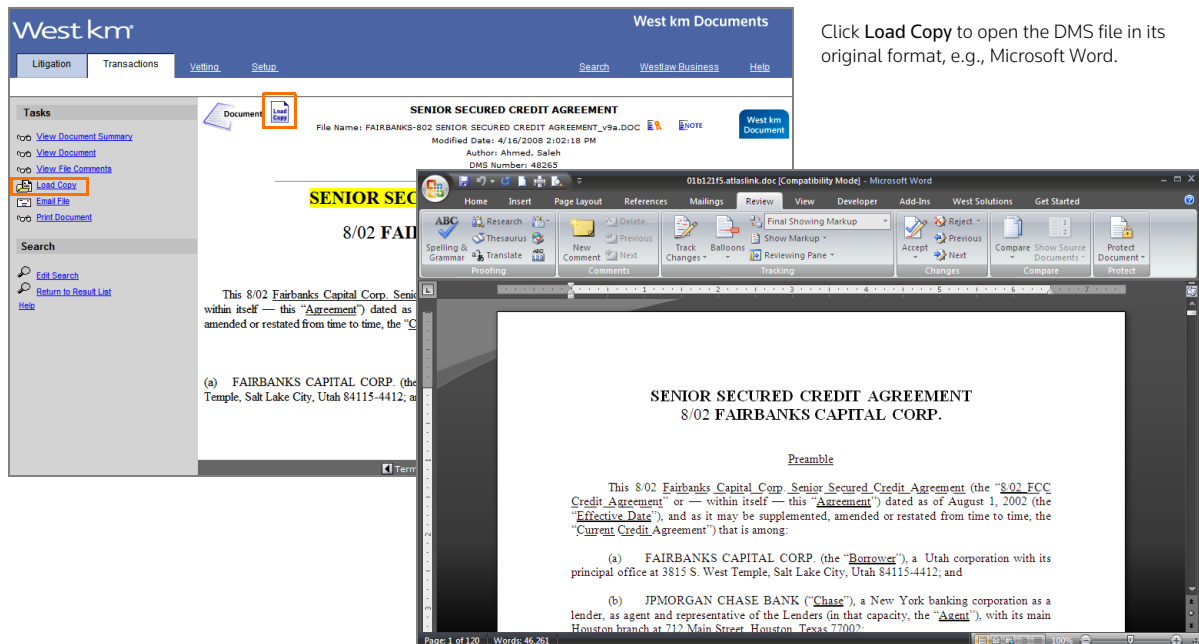
When the full text of the document, clause, or defined term is displayed in the right frame, click a link in the left frame to perform the following tasks:

- To view the full text of the document, clause, or defined term, click the **View** link, e.g., **View Document**.
- To view comments written by a colleague with annotator rights about the document, click **View File Comments** in the left frame or click the **Note** icon () at the top of the right frame.

An Exemplar icon ( or ) at the top of the right frame indicates that the document has been flagged as a model example by a colleague with annotator rights. You may want to use this document to draft new documents of the same type.

Note The Comments and Exemplar links and icons are only displayed if a colleague with annotator rights has added this information.

- To work with the DMS file containing the document, clause, or defined term in its original format, e.g., a Microsoft Word document, click **Load Copy** (Figure 3-6). Once a copy of the file is loaded, you can edit and save the file.
- To e-mail the DMS file containing the document, clause, or defined term, click **Email File**. Your e-mail editor is opened and the DMS file in its original format, e.g., a Microsoft Word document, is attached to a new message.
- To print the document, clause, or defined term, click the **Print** link, e.g., **Print Document**. See “Printing Documents, Clauses, or Defined Terms” on page 18 for more information.
- To edit your search, click **Edit Search**.
- To return to your search result, click **Return to Result List**.



Click **Load Copy** to open the DMS file in its original format, e.g., Microsoft Word.

Figure 3-6. A DMS file in Microsoft Word

Viewing a Summary

To view a summary of a document, clause, or defined term, do one of the following:

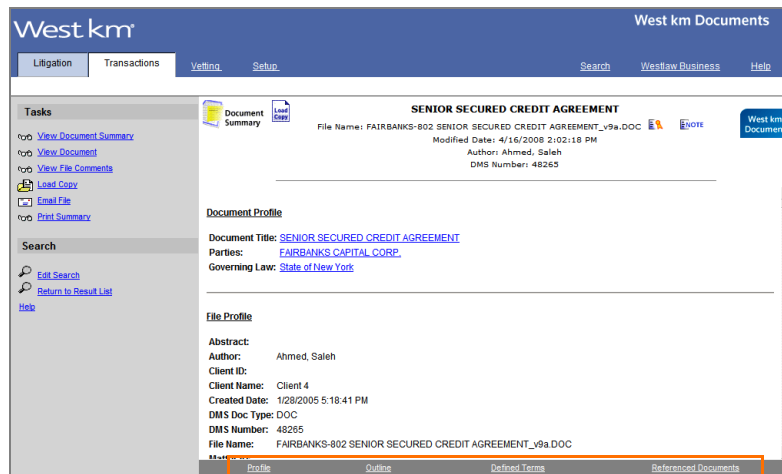
- When viewing a result list, click **Summary** next to the title.
- When viewing a document, clause, or defined term, click the **View Summary** link, e.g., **View Document Summary**, in the Tasks list.

To view a section of the summary, click a link in the summary footer.

To print a summary, click **Print Summary** (Figure 3-7).

The summary may include the following sections:

- **Document Profile:** Displays data that was generated by West km during analysis, such as the title, party names, law firms, governing law, and execution date. Click a link in the profile to jump to the reference.
- **File Profile:** Displays metadata that was gathered from your organization's DMS, such as file title, author, created and modified date, and client and matter information.
- **Outline:** Displays an outline of the document, clause, or defined term. Click a link in the outline to jump to that section.
- **Defined Terms:** Click a term to jump to its definition in the text of the document or clause.
- **Referenced Documents:** Shows a list of all documents explicitly referenced in the document you are viewing. Click a document title to go to its reference in the document you are viewing.



Click a link in the footer to view a section of the summary.

Figure 3-7. A document summary

If multiple instances of the same metadata, defined term, or referenced document are found, the item is listed only once in the summary. The number of instances is indicated in parentheses after the item. To jump to the first instance in the text of the document or clause, click the item. Then use Term arrows to navigate to other instances.

Printing Documents, Clauses, or Defined Terms

You can deliver documents, clauses, and defined terms to a printer attached to your computer or on your network.

PRINTING FROM A DOCUMENT, CLAUSE, OR DEFINED TERM

When you are viewing a document, clause, or defined term, complete these steps to print it:

1. Click the **Print** link, e.g., **Print Document**, in the Tasks list.
2. In the West km Print dialog box, select the range and content options you want.
3. Click **Send Request**. After a moment, the Print dialog box from your Web browser is displayed.
4. Select a printer and click **Print**.

PRINTING FROM A RESULT LIST

When you are reviewing a result list of documents, clauses, or defined terms, complete these steps to print one or more items or to print the result list:

1. If you want to print selected items, select the check box next to each item in the result that you want to print.
2. Click **Print** at the top of the page, and then choose what you want to print. You can print selected documents or print the result list (Figure 3-8).

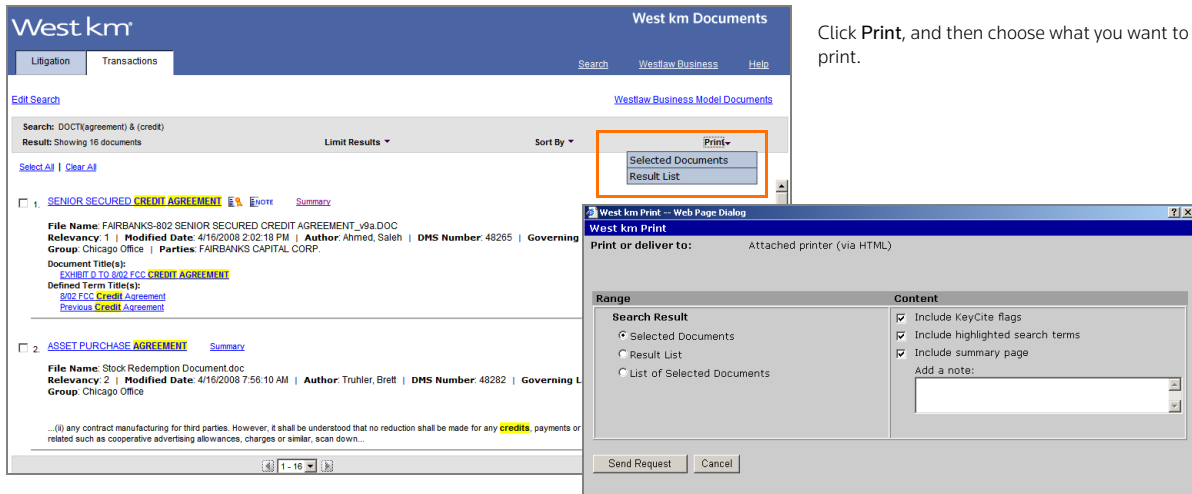


Figure 3-8. The Print menu and the Print dialog box

3. In the Print dialog box, select the range and content options you want.
4. Click **Send Request**. After a moment, the Print dialog box from your Web browser is displayed.
5. Select a printer and click **Print**.

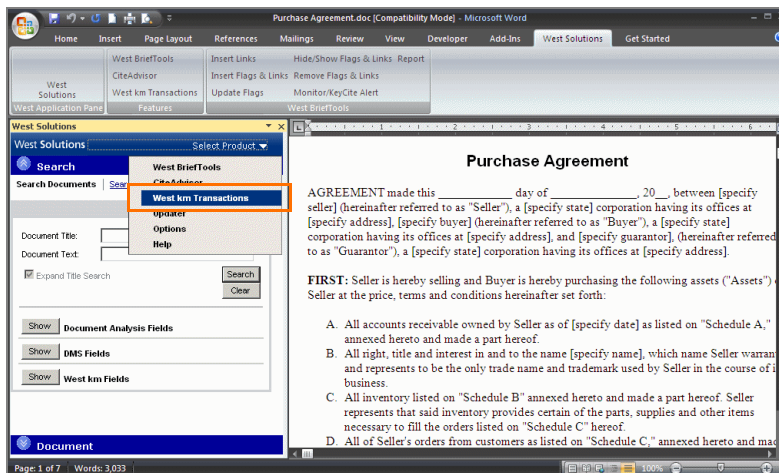
4 Displaying West km Transactions in Your Word Processor

With West km Transactions in West BriefTools, you can search your organization’s transactional documents while working on a draft document in Microsoft Word or Corel WordPerfect. From a result, you can easily copy and paste text from an existing document, clause, or defined term into your draft document.

Accessing West km Transactions in West BriefTools

To access West km Transactions in West BriefTools, complete these steps:

1. Open a draft document in Microsoft Word or Corel WordPerfect.
2. Open West Solutions by doing one of the following:
 - On your word processor’s toolbar, click the **West Solutions** button.
 - In your word processor, click the **West Solutions** menu, and then choose **West Solutions**.
 - In Word 2007, click the **West Solutions** tab, and then click the **West Solutions** button.
3. In the West Solutions window, click **Select Product**, and then choose **West km Transactions** (Figure 4-1).
4. If you are prompted, enter the client ID for the client or matter to which the document pertains.

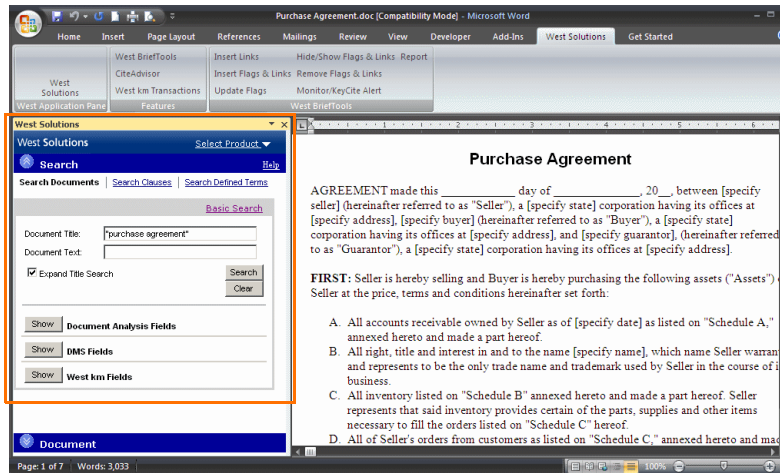


In the West Solutions window, click **Select Product**, and then choose **West km Transactions**.

Figure 4-1. West km Transactions in the West Solutions window

RUNNING A SEARCH

The Search pane is displayed when you open the West km for Transactions window (Figure 4-2). In the Search pane, you can search for documents, clauses, or defined terms using a basic or advanced search template. To redisplay the Search pane after you run a search, click **Edit Search** in the Result List pane.

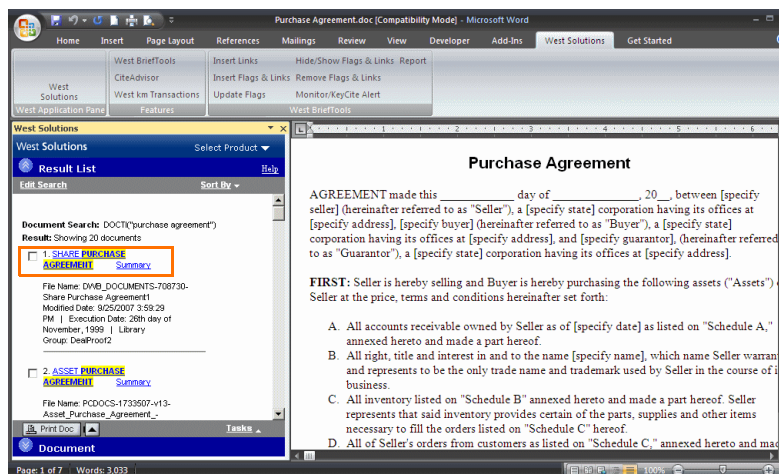


Click a content type, select a search option, type one or more terms in the text box, and click **Search**.

Figure 4-2. The Search pane in the West Solutions window

VIEWING THE RESULT LIST

Search results are displayed in the Result List pane. To view the full text of a document, clause, or defined term, click its title (Figure 4-3). The text is displayed in the Document pane just below the Result List pane. From the Result List pane you can also print the result list; print the full text of a document, clause, or defined term; view summary information about the document, clause, or defined term; view comments about the document; edit your search; or expand a search for clauses or defined terms. See “Viewing a Result List” on page 10 for more information.

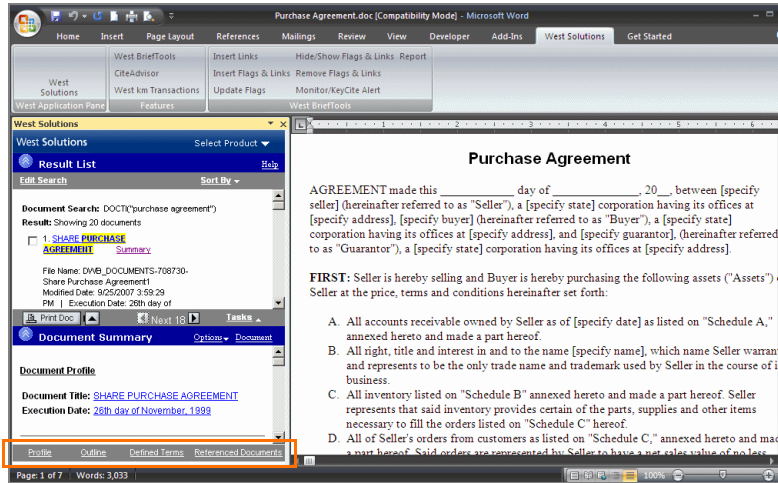


To view the full text of a document in the Document pane, click its title in the Result List pane.

Figure 4-3. A result in the West Solutions window

VIEWING A SUMMARY

The Document pane displays the full text of documents, clauses, and defined terms. Click **Summary** in the upper-right corner to display all sections of a document, clause, or defined term. Click a link at the bottom of the pane to jump to that section (Figure 4-4). See page 17 for an explanation of the summary sections.



Click a link in the footer of the Document Summary pane to view a section of the summary.

Figure 4-4. A document summary in the West Solutions window

SELECTING TASKS

Click **Options** in the upper-right corner of the Document pane to access the following tasks:

- To view comments written by a colleague with annotator rights about the document, click **View File Comments**. You can also click the **Note** icon (📌NOTE) in the Result List pane.

An Exemplar icon (📌 or 📌) in the Result List pane indicates that the document has been flagged as a model example by a colleague with annotator rights and can be used to draft new documents of the same type.

Note The Comments and Exemplar links and icons are only displayed if a colleague with annotator rights has added this information. If you have annotator rights, click **Annotate File** to annotate the document.

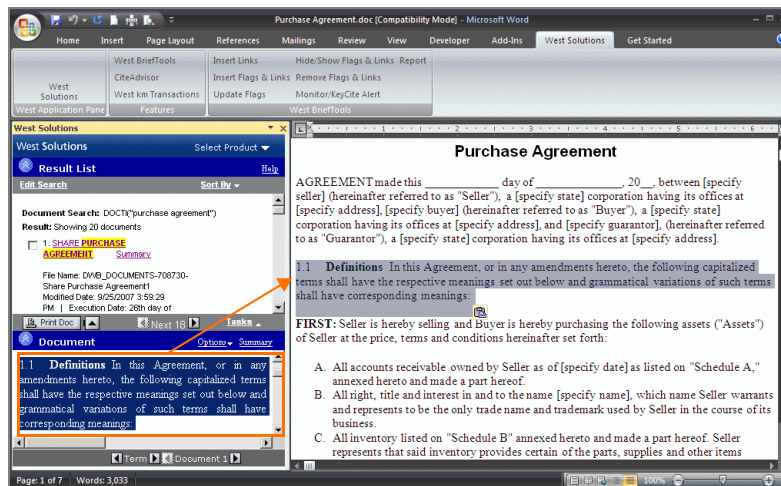
- To work with the DMS file containing the document, clause, or defined term in its original format, e.g., a Microsoft Word document, click **Load Copy**. Once the file is loaded, you can edit and save the file.
- To e-mail the DMS file containing the document, clause, or defined term, click **Email File**. Your e-mail editor is opened and the DMS file in its original format, e.g., a Microsoft Word document, is attached to a new message.
- To print the document, clause, or defined term, click **Print**.
- To display the West km Help Center in a new window, click **Help**.

Copying Text from a Transactional Document into a Word Processor

One of the most useful and time-saving features of West km Transactions in West BriefTools is the ability to easily copy text from your organization's transactional documents and paste it into your Microsoft Word or Corel WordPerfect draft documents (Figure 4-5).

To copy text into your word-processing document, complete these steps:

1. With the full text of a document, clause, or defined term displayed in the Document pane, highlight the section of the text you want to copy.
2. Drag the text selection into your draft document. Or you can do the following:
 - a. To copy the text, right-click and then choose **Copy** from the shortcut menu.
 - b. Position your cursor in your draft document where you want the text to be added. From the **Edit** menu in your word processor, choose **Paste**.



Highlight text in the Document pane and drag it into your draft document.

Figure 4-5. Text from a transactional document to be copied into a Word document

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