West km for Transactions

Use West km for Transactions to search, view, and print your organization's internal transactional documents (e.g., agreements, exhibits, schedules, etc.). Search results include summaries, comments by colleagues, and exemplar indicators to help you quickly identify relevant content.

For search assistance, call West km Support at 1-888-Westkm1 (1-888-937-8561), option 2.

Searching Transactional Documents

To access the West km Transactions interface, open a browser and go to **hostname/km** where hostname is the name of your West km server on your network.

You can search your internal transactional documents, clauses, and defined terms. If you are searching by title, West km for Transactions applies concept searching to broaden your search by automatically retrieving synonyms and related concepts for your search terms. For example, a search for loan agreements might also retrieve credit and debt agreements.

BROWSING YOUR DOCUMENTS

You can easily browse content in a particular library group from the Home page.
In the Browse section, click a libraries tab (e.g., Transactions Libraries). The documents in that library group are displayed. In addition, a corresponding tabbed text box is displayed at the top of the page. To search this library group, type your search in the text box and click Search.
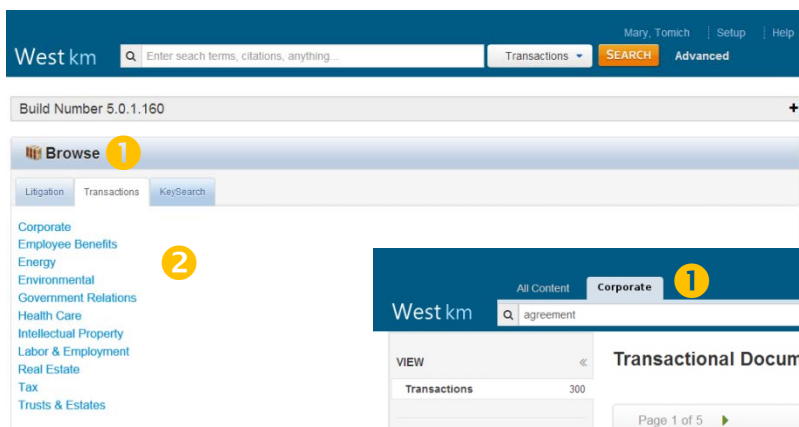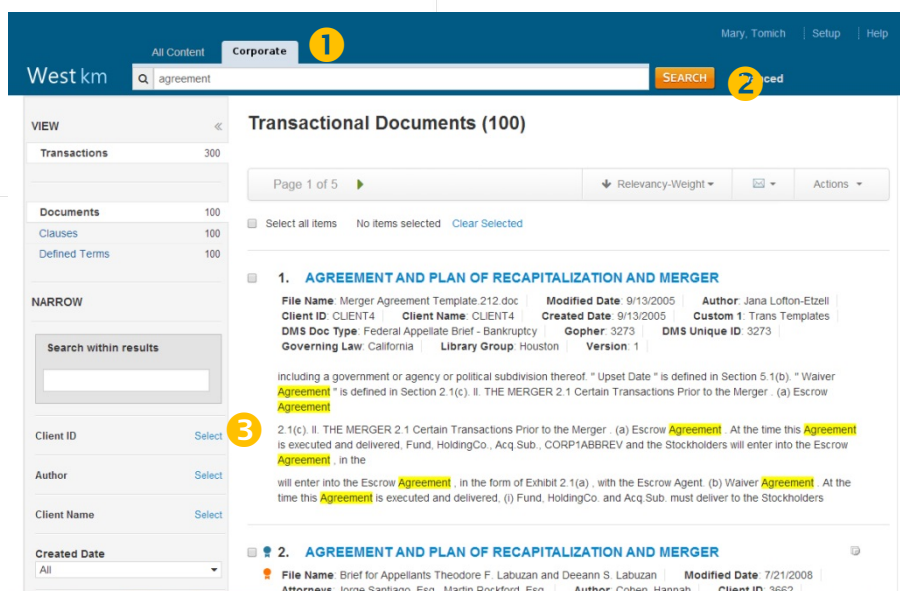
To browse a West km Transactions library:

1. Click the **Transactions** tab
2. Click a library to select it, then scroll through the content.

Searching library content:

1. Enter search terms Tab shows library where search will be run.
2. Click Search.
3. Search terms are highlighted in retrieved documents.

USING BASIC SEARCH

Using the search box at the top of the page, you can search the full text of West km documents using either a terms and connectors query or natural language.

TERMS AND CONNECTIONS

Use Boolean terms and connectors query to specify the relationship between your search terms. Just type your query in the search box at the top of the page and click Search.
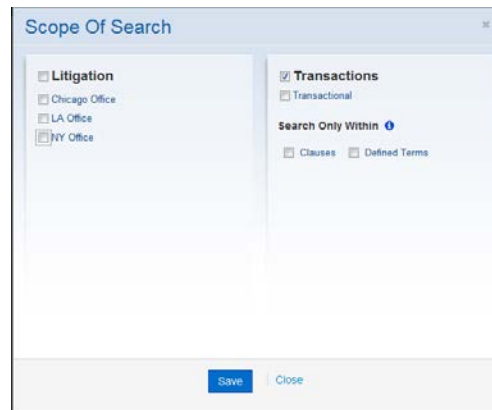
NATURAL LANGUAGE

Use descriptive terms in plain language to describe the legal issue you are researching. This method is often effective when you are researching a complex legal issue.

SCOPE OF SEARCH
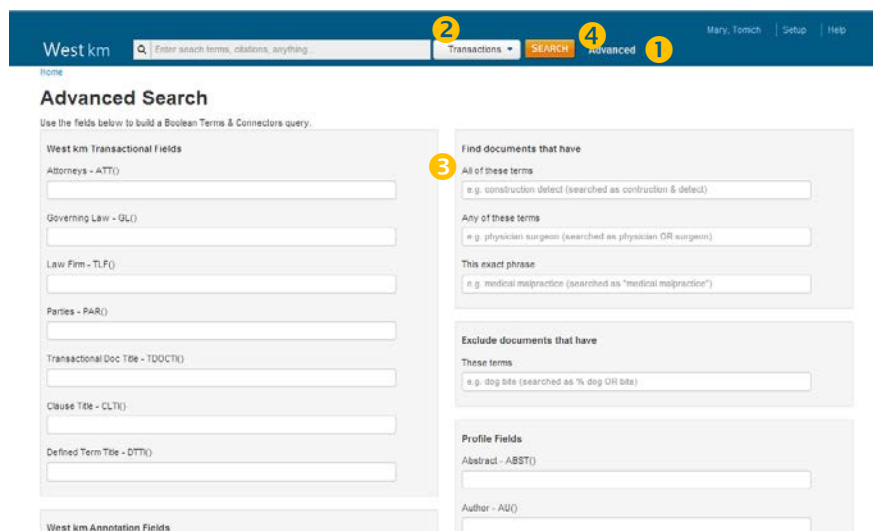
When using the search box in West km, you can restrict your search to particular groups of documents.

Before running your search, click the list next to the search box at the top of the page. In the Scope of Search dialog box, select the content and library groups you want to search and click Save.

ADVANCED SEARCHING

Using advanced search pages, you can restrict all or part of your search to specific fields (types of data). Advanced search pages automatically run searches using terms and connectors.

To perform an advanced search:

1. At the top of the page, click Advanced.
2. Change the scope of your search, if desired.
3. Enter information in one or more fields. You can enter as much or as little information as you know.
4. Click Search at the top of the page.

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Retrieving Transactional Documents

SEARCH RESULTS

Retrieved documents are displayed in the result list. For each document in a search result, the first three search terms are shown in the result list with surrounding document text and are highlighted in yellow.

1. To view results for a different content set, click a link in the View section.
2. To view additional documents in the result, click the Next arrow at the top of the page.
3. To change the sort order of the result, click the Sort By list and then click an option. To change from ascending to descending order (or vice versa), select the same option again.
4. To print or email the result list (or selected documents from the result list), click the Print or Email icon and then click an option.
5. To view one of your organization's documents, click its title.
6. To narrow the number of documents in your result, use the options in the Narrow section.
7. An Exemplar icon (🏅 or 🏅) to the left of the title 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.
8. A Note icon (📄) to the right of the title indicates that notes about the document were added by a colleague with annotator rights.

VIEWING A DOCUMENT

When you click a document title in a result, the document is displayed.

1. When you retrieve a document by searching, the search terms are highlighted in yellow.
2. Document arrows take you to the next or previous document in your result.
3. Term arrows take you to the next or previous term in your result.
4. To view details about a transactions document, click the Summary tab.
5. To open a copy of the document in its original format, click the download icon.
6. An Exemplar icon next to the title indicates that the document has been flagged as a model example by a colleague with annotator rights.
7. To view notes about a document, click the Notes bar at the top of the document.

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VIEWING DOCUMENT DETAILS

When viewing a document, clause, or defined term, additional details may be available for viewing, including a summary, outline, defined terms listing, and referenced document listing. Click the corresponding tab to display the additional detail.

OUTLINE

Displays an outline of the document, clause, or defined term. Click a link in the outline to jump to that section.

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.

SUMMARY

The summary may include the following sections:

- Document Profile: Displays data that was generated by West km during analysis, such as the title, parties, law firm, and governing law. Click a link in the profile to jump to the reference.

- File Profile: Displays metadata that was gathered from your organization's document management system, such as file name, author, created and modified date, and client and matter information.

DEFINED TERMS

Click a term to jump to its definition in the text of the document or clause.

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