

PRACTICE TECHNOLOGY & SERVICES

WEST KM USER GUIDE

VERSION 5.0



THOMSON REUTERS™

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Contents

1 WELCOME TO WEST KM	1
Litigation Features	1
Transactions Features	1
Requirements	2
Getting Help	2
Accessing West km	2
Working with Documents	2
2 SEARCHING DOCUMENTS	4
Basic Searching	4
Terms and Connections	4
Natural Language	4
Searching by Library Group	5
Scope of Search	5
Browsing	5
Advanced Searching	6
Field Restrictions	6
Include or Exclude Terms	8
Searching by Citation	8
From the Search Box	8
From a Document	9
Depth of Treatment	9
KeyCite Status Flags	10
Searching with KeySearch	11
3 BROWSING RESULTS	13
Viewing a Result	13
Search Results	13
KeyCite Results	15
Narrowing a Result	16
Search within Results	16
Filters	17
Viewing a Document	18
Viewing Document Details	20
Litigation Documents	20
Transactions Documents	21
Printing and Emailing	23
Printing	23
Emailing	24
4 RETRIEVING CITING DOCUMENTS ON WESTLAWNEXT	25
Retrieving Citing Documents from a WestlawNext Document	25
Retrieving Citing Documents from a WestlawNext Result	26
5 SEARCHING DOCUMENTS ON WESTLAWNEXT	27
Accessing West km Documents from a WestlawNext Result	27
Searching Only West km Documents on WestlawNext	28
Searching All West km Content	28
Searching a West km Library Group	29

6 BROWSING RESULTS ON WESTLAWNEXT	30
Viewing a West km Document	32
Narrowing Your West km Result with Filters	32
Searching within Results	32
Using Filters	33
7 REFERENCE LISTING	35
Connectors and Special Characters	35
Field Restrictions	37
Dates	39
Include or Exclude Terms	39
INDEX	41

1 Welcome to West km

Welcome to West km, a knowledge management product that allows staff members at your legal organization to easily find and reuse your best work.

West km for Litigation integrates WestlawNext search technology, KeyCite, and KeySearch with your organization's internal documents, such as briefs, pleadings, and memos. You can view and search internal documents in the West km interface or simultaneously with a WestlawNext search.

West km for Transactions provides searching and drafting capabilities based on your organization's internal transactional documents, such as agreements, forms, and regulatory filings. Members of your organization can search by documents, clauses, and defined terms.

This guide explains how to use West km for Litigation and West km for Transactions.

Litigation Features

In West km for Litigation, you can

- Search your organization's documents using search methods familiar to you from WestlawNext and using the KeySearch hierarchy of legal topics.
- Search your organization's documents and WestlawNext documents simultaneously on WestlawNext.
- Build and refine a citations list of your organization's documents.
- Link directly from a document to related internal documents and to content on WestlawNext.
- Filter the number of documents in a result to more easily pinpoint those that are the most pertinent.
- View notes 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 Administrator Guide*.)
- With Drafting Assistant, use BriefTools to embed citation links and KeyCite status flags in word-processing documents, as well as easily search internal litigation documents while working in your word processor.

Transactions Features

In West km for Transactions, you can

- Search your organization's transactional documents using search methods familiar to you from WestlawNext.
- Filter 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 notes 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 Administrator Guide*.)
- With Drafting Assistant, easily find internal documents, clauses, and defined terms while working in your word processor.

Requirements

Your administrator will index the appropriate documents at your organization so they can be used with West km. After this index processing is complete, you must meet these 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.
- You must be designated as an active West km user by your administrator.

Getting Help

Online help is available in West km to assist you with your research. For help information, click **Help** at the top of any West km page.

This guide assumes you have some familiarity with basic searching on WestlawNext; for more information, see the *WestlawNext Getting Started Guide* and the *KeyCite on WestlawNext* guide.

Accessing West km

You can retrieve documents that are indexed in West km via the West km interface and the WestlawNext interface. You can also access West km features in your word processor using Drafting Assistant.

West km Interface

In the West km interface, you can search all your organization's West km documents.

To access the West km interface, open your web browser and go to **hostname/km**, where *hostname* is the name of the West km server on your network. If you don't know the name of the West km server, your administrator can provide it.

WestlawNext

On WestlawNext, you can search just your organization's West km documents, or you can search your organization's West km documents and WestlawNext documents simultaneously.

WestlawNext usage charges do not apply when you access only your organization's documents on WestlawNext. Regardless of your WestlawNext pricing method—hourly or transactional—all WestlawNext usage charges are suspended when you

- search only your organization's documents
- view a result list of your organization's documents
- access one of your organization's documents

Word Processor

From your word processor, you can access West km features using Drafting Assistant. For more information, see the *West km in Drafting Assistant Quick Reference Guide*.

Working with Documents

Before you begin working in West km, it is helpful to understand the origins of documents and document metadata you will search and browse.

Files at your organization are stored in a file system or document management system (DMS) in their original format, such as Microsoft Word. From these locations, West km collects documents and document metadata to use in West km; for example, metadata from a DMS could include author, client ID, and date. During the document indexing process, West km analyzes these documents and extracts

and tags significant content. For example, for litigation documents, metadata could include title, jurisdiction, court, attorney, and company. For transactional documents, metadata could include title, attorneys, governing law, law firm, and parties.

Both these types of metadata, as well as information added by your colleagues to West km directly, such as library groups and notes, make it easier for you to search and browse documents in West km.

Transactions Documents

In West km for Transactions, documents are also analyzed to create document, clause, and defined term content collections that you can search and browse.

- A *document* corresponds to the original file from your document management system. 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*.

Note that when you email or load a copy of a clause or defined term, you are actually emailing or loading the full document.

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

2 Searching Documents

Using West km, you can easily search for documents.

Basic Searching

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

You can use a 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**.



Terms and connectors search

These queries consist of two parts:

- terms from the document or issue that you are researching
- connectors that specify the relationship between those terms

This method is usually most effective when you know details about a specific document that you want to retrieve or when you want to retrieve all documents that meet specific criteria. For example,

"insurance policy" /s coverage period /s effect! /p damage injur**

For a listing of connectors, see "Connectors and Special Characters" on page 35.

NATURAL LANGUAGE

You can use descriptive terms in plain language to describe the legal issue you are researching. Just type your terms in the search box at the top of the page and click **Search**.



Natural language search

This method is often effective when you are researching a complex legal issue. For example,

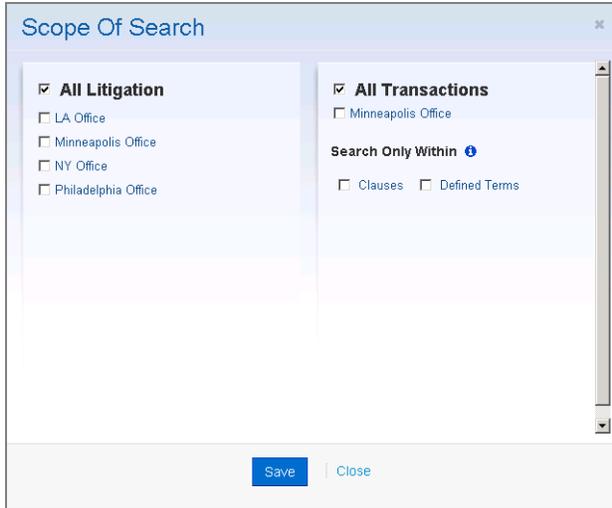
must damage be demonstrated that it occurred while an insurance policy is in effect

Searching by Library Group

SCOPE OF SEARCH

When using the search box in West km, you can restrict your search to particular groups of documents. For example, if you have both West km for Litigation and West km for Transactions, you might want to restrict your search to litigation documents, transactions documents, or both. Or you might want to restrict your search to documents in particular office locations or practice areas.

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**.



Scope of Search dialog box

BROWSING

You can easily browse content in a particular library group from the Home page.

In the Browse section, click a libraries tab (e.g., **Litigation 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**.



Browse library groups

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 (see “Scope of Search” on page 5).
3. Enter information in one or more fields. You can enter as much or as little information as you know.
Note To clear the field information, click **Advanced** again.
4. Click **Search** at the top of the page.

Advanced Search page

FIELD RESTRICTIONS

When entering information in fields on advanced search pages, note the following:

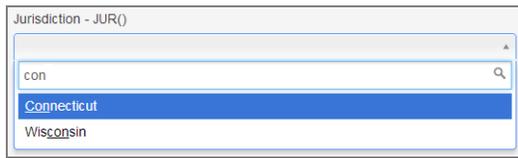
- By default, the AND connector is used to connect field criteria.
- Primary judges (identified in document captions) are searched by default. To also search secondary judges (referenced in the text of documents), select the **Include Secondary Judge References** check box.
- When searching litigation content, you must choose a jurisdiction before choosing a court.

Depending on how your West km administrator has configured your system, the following types of search controls may be shown for fields:

- **Text box:** Type your search terms in the text box. Terms and connectors can be used (for details, see “Connectors and Special Characters” on page 35).

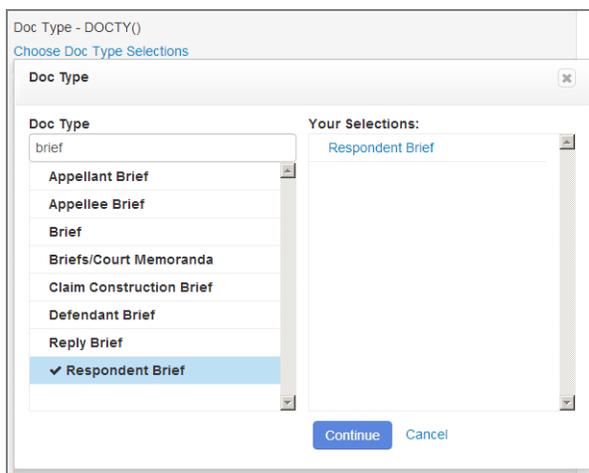
Text box

- **Drop-down list:** Choose a single option from the drop-down list. If you type characters in the text box at the top of the list, only entries matching the values you type are displayed.



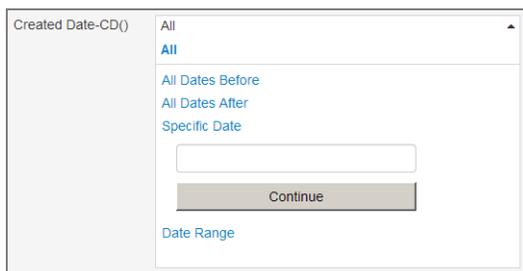
Drop-down list

- **Look-up control:** Click the **Choose** link for the field and then select entries in the dialog box. To select an entry, click it to move it to the Your Selections box. To remove an entry, click it again. If you type characters in the text box at the top of the dialog box, only entries matching the values you type are displayed.



Look-up control

- **Date control:** When entering a date, a variety of formats are recognized. For a listing of accepted formats, see "Dates" on page 39.



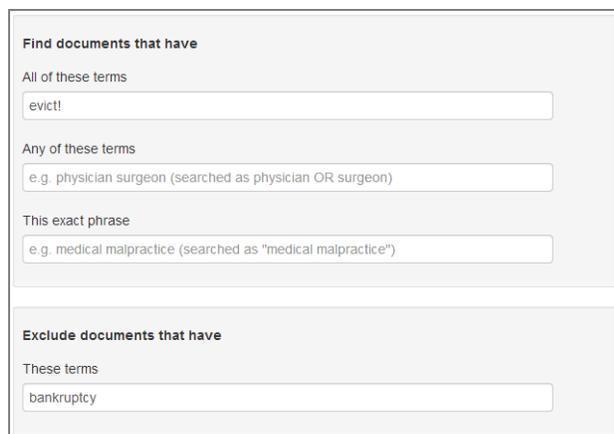
Date control

Note All values are displayed in drop-down lists and look-up controls, regardless of the library groups you have selected.

In addition, you can also use field restrictions when typing a terms and connectors query in the search box at the top of the page. This method allows you to use field restrictions with connectors and special characters other than AND between fields. For a listing of field restrictions, see "Field Restrictions" on page 37.

INCLUDE OR EXCLUDE TERMS

On advanced search pages, you can specify terms that must or must not appear in documents in your result. Just type one or more terms within the sections labeled Find Documents That Have or Exclude Documents That Have.



The screenshot shows a search interface with two main sections: "Find documents that have" and "Exclude documents that have".

Find documents that have

- All of these terms**: A text box containing "evict!".
- Any of these terms**: A text box containing "e.g. physician surgeon (searched as physician OR surgeon)".
- This exact phrase**: A text box containing "e.g. medical malpractice (searched as 'medical malpractice')".

Exclude documents that have

- These terms**: A text box containing "bankruptcy".

Advanced Search page—include and exclude documents

For details on the rules of the text boxes, see "Include or Exclude Terms" on page 39.

Searching by Citation

KeyCite is the citation service that allows you to quickly determine whether cases, statutes, regulations, or administrative decisions are good law and find other sources that cite them.

In West km for Litigation, the power of KeyCite is integrated with your organization's internal documents so that you can

- build a list of your organization's citing documents
- view the extent to which a citing document discusses a cited document
- easily evaluate the validity of cases, statutes, regulations, or administrative decisions that are cited in your organization's documents

FROM THE SEARCH BOX

You can easily retrieve a list of your organization's documents that cite a particular WestlawNext document.

Just type the KeyCite command (**kc:** or **keycite:**), followed by the citation, in the search box at the top of the page and click **Search**.



The screenshot shows the West km search interface. The search box contains the text "kc: 371 mass 489". To the right of the search box is a dropdown menu set to "Litigation" and a "SEARCH" button.

Search for citing documents

Note When typing a citation, include spaces in the format, such as between the volume number, publication, and page number, and between the statutory abbreviation and section number (e.g., type **kc: 501 us 380**, not **kc: 501us380**).

FROM A DOCUMENT

When you are viewing one of your organization's documents in West km for Litigation, the KM icon () appears after each citation that is used in other indexed West km documents at your organization.

Just click the KM icon to view the citing documents.

 [Nat'l Bank v. Dearing, 91 U.S. 29, 32-35 \(1875\)](#) 

DEPTH OF TREATMENT

West km uses KeyCite depth of treatment bars to indicate the extent to which a citing document at your organization discusses a WestlawNext document.

[Amicus Brief Supporting Petitioner Beneficial Nat'l, et al](#) 

The definitions and the number of citing references are West km defaults. Your administrator may have customized these for your organization.

Symbol	Definition	Description
	Examined	Your organization's document cites the WestlawNext document 10 or more times.
	Discussed	Your organization's document cites the WestlawNext document 6 to 9 times.
	Cited	Your organization's document cites the WestlawNext document 2 to 5 times.
	Mentioned	Your organization's document cites the WestlawNext document 1 time.

KEYCITE STATUS FLAGS

West km adds a KeyCite status flag next to each citation in your document that has available KeyCite information. These flags allow you to easily evaluate the validity of a case, statute, regulation, or administrative decision.



In cases and administrative decisions, a red flag warns that the case or administrative decision is no longer good law for at least one of the points of law it contains.

In statutes and regulations, a red flag indicates 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.



In cases and administrative decisions, a yellow flag warns that the case or administrative decision has some negative history but hasn't been reversed or overruled.

In statutes and regulations, a yellow flag warns that

- the statute has been renumbered or transferred by a recent session law;
- 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);
- a proposed rule affecting the regulation is available;
- the regulation has been reinstated, corrected, or confirmed;
- the statute or regulation was limited on constitutional or preemption grounds or its validity was otherwise called into doubt; or
- a prior version of the statute or regulation received negative judicial treatment.



In cases and administrative decisions, a blue H indicates that the case or administrative decision has some history.



In cases and administrative decisions, a green C indicates that the case or administrative decision has citing references but no direct history or negative citing references.

In statutes and regulations, a green C indicates that the statute or regulation has citing references.



In your organization's documents, a red KC indicates that a citation could not be verified. Click this icon to display one of the following on WestlawNext:

- The document page (not the first page) that you indicated in the citation
- A list of documents that are potential matches for the citation
- Suggestions on the citation format to help you locate the document
- A message indicating the document is not available



In your organization's documents, the KM icon displays *after* the citation to show that the cited document is referenced in indexed documents at your organization.

To view detailed KeyCite information about a citation, click its KeyCite status flag.

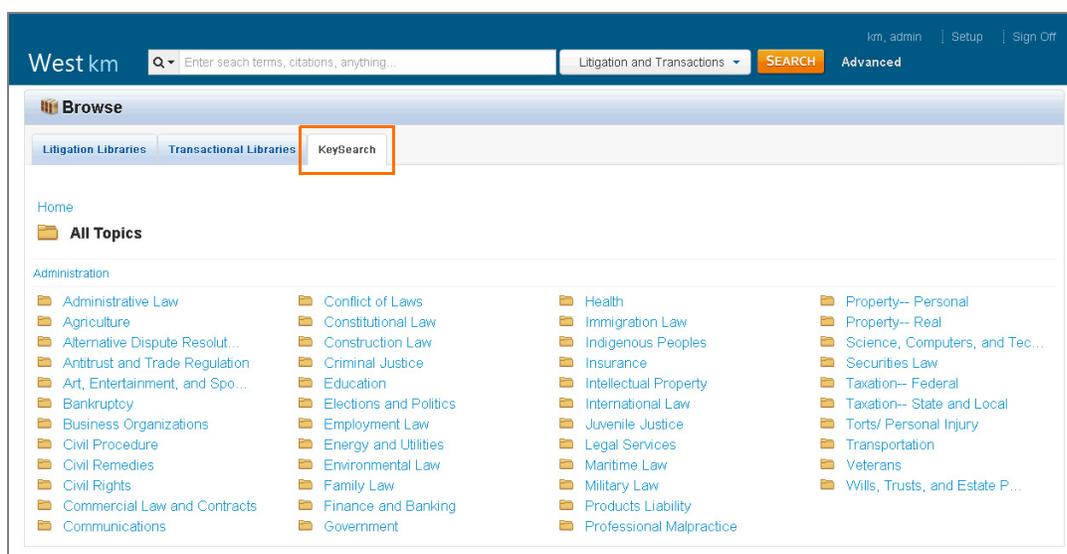
Searching with KeySearch

In West km for Litigation, KeySearch can help you easily retrieve documents at your organization that are relevant to a legal topic. The following techniques are used to ensure that KeySearch retrieves comprehensive, reliable, and relevant documents at your organization:

- **Automatic Classification:** West's categorization and recommendation engine (CaRE) automatically indexes and assigns your organization's documents to KeySearch topics.
- **Manual Classification:** Your administrator can manually assign documents to KeySearch topics. In addition, your administrator can customize the existing KeySearch hierarchy of topics to meet your organization's needs. (For details, see the *West km Administrator Guide*.)
- **Full-Text Searching:** Terms and connectors queries crafted by West attorney-editors and your administrator leverage full-text searching to retrieve documents related to KeySearch topics.

To retrieve documents at your organization using KeySearch,

1. In the West km interface, click the **KeySearch** tab. The KeySearch page is displayed.



Click the **KeySearch** tab to retrieve your organization's documents by selecting from a hierarchy of legal topics.

The KeySearch page

2. Browse the list of KeySearch topics and subtopics by clicking the **Browse** icons (📁) or hypertext links.

If displayed, numbers after each topic indicate the number of unique documents at your organization that were assigned to that topic and its subtopics by automatic or manual classification. (This count does not include documents retrieved using full-text searching.)

3. Change the scope of your search to particular library groups, if desired (see "Scope of Search" on page 4).
4. When you click a KeySearch topic, a corresponding tabbed text box is displayed at the top of the page.
 - To display all documents in that KeySearch topic, leave the text box blank and click **Search**.
 - To search that KeySearch topic, type your search in the text box and click **Search**.

The documents relevant to the KeySearch topic you selected are displayed.

The screenshot shows the West km search interface. At the top, there are tabs for 'All Content' and 'Unemployment Compensation'. A search bar contains the text 'eligible' and a 'SEARCH' button. Below the search bar, the results are displayed under the heading 'Litigation Documents (82)'. The results are listed in a table with columns for 'File Name', 'Modified Date', and 'Author'. The first three results are:

File Name	Modified Date	Author
Brief of Appellant Teamsters Local 312	2007-10-07T15:27:00	Linda L Kelly
Brief for Petitioner Green Tree	2007-10-10T10:55:00	Will Black Kelly
Reply Brief for Petitioner Green Tree	2007-10-10T10:55:00	Will Black

When you click a KeySearch topic, a corresponding tabbed text box is displayed at the top of the page. Type your search in the box, if desired, and click **Search**.

KeySearch topics and a KeySearch result

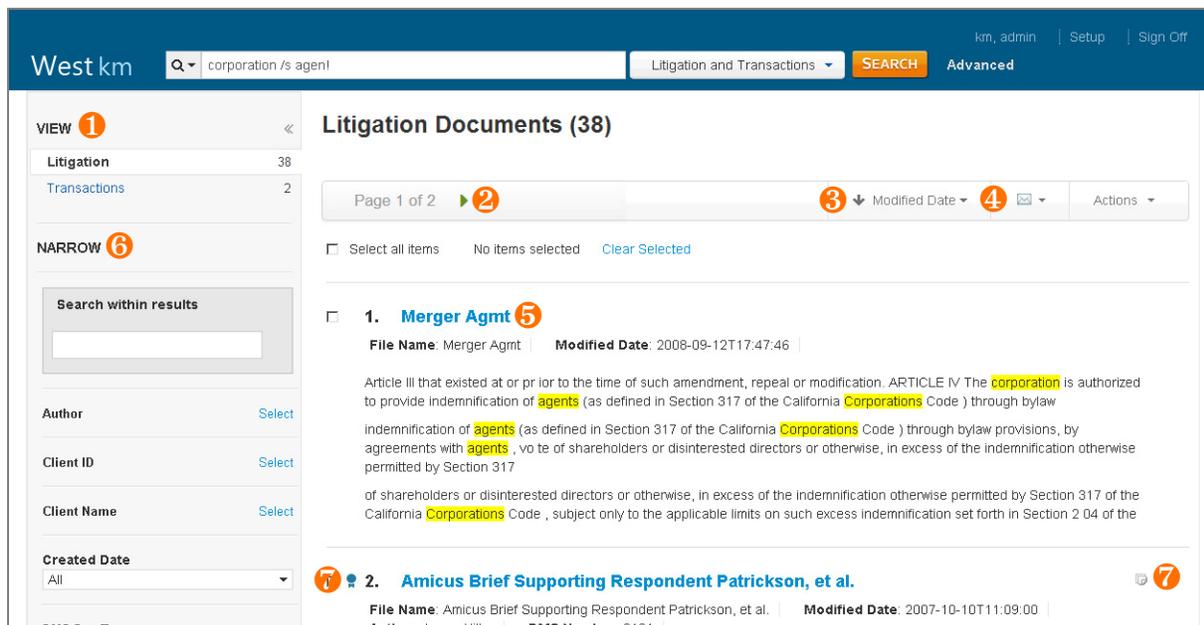
3 Browsing Results

Retrieved documents are displayed in the result list.

Viewing a Result

SEARCH RESULTS

When you run a search, documents matching your search criteria are listed on the result page.



A search result

1 View a Content Set

To view results for a different content set, click a link in the View section.

2 Next

To view additional documents in the result, click the **Next** arrow  at the top of the page.

3 Sort

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 Print or Email

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. For details, see “Printing and Emailing” on page 23.

5 View a Document

To view one of your organization's documents, click its title. For details, see "Viewing a Document" on page 18.

For each document, the first three search terms are shown with surrounding document text; search terms are highlighted in yellow.

6 Narrow with Filters

To narrow the number of documents in your result, use the options in the Narrow section. For details, see the following section, "Narrowing a Result."

7 Annotations

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.

A Note icon () to the right of the title indicates that notes about the document were added by a colleague with annotator rights.

KEYCITE RESULTS

When you retrieve documents using KeyCite, citing documents are listed on the result page.

The screenshot displays the WestlawNext KeyCite Results page. At the top, the search criteria 'kc: 28 usca 1441' is entered, and the results are filtered to 'Litigation and Transactions'. The page shows 22 results. On the left, there is a 'NARROW' filter with 8 items and a 'Search within results' box. Below that, there are filters for 'Depth of Treatment' (4, 4, 14) and 'Author' (Select). The main results list shows three items:

- 1. **Amicus Brief Supporting Petitioner Beneficial Nat'l, et al.** (7) | File Name: Amicus Brief Supporting Petitioner Beneficial Nat'l, et al. | Modified Date: 2007-10-10T10:55:00 | Author: Kim Garrin | DMS Number: 3140
- 2. **Brief for Petitioner Breuer** (9) | File Name: Brief for Petitioner Breuer | Modified Date: 2007-10-10T10:55:00 | Author: Kim Garrin | DMS Number: 3137 | Library Group: LA Office
- 3. **Amicus Brief Supporting Petitioner Beneficial Nat'l, et al.** (7) | File Name: Amicus Brief Supporting Petitioner Beneficial Nat'l, et al. | Modified Date: 2007-10-10T11:09:00 | Author: Kim Garrin | DMS Number: 3121

A KeyCite result

1 KeyCite Information

To access KeyCite information on WestlawNext, click the flag preceding the citation.

2 View a WestlawNext Document

To access the document on WestlawNext, click the citation link.

3 Next

To view additional documents in the result, click the **Next** arrow  at the top of the page.

4 Sort

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.

5 Print or Email

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. For details, see "Printing and Emailing" on page 23.

6 View a Document

To view one of your organization's documents, click its title. For details, see "Viewing a Document" on page 18.

7 Depth of Treatment

KeyCite depth of treatment bars indicate the extent to which the document discusses the cited document.

8 Narrow with Filters

To narrow the number of documents in your result, use the options in the Narrow section. For details, see the following section, “Narrowing a Result.”

9 Annotations

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.

A Note icon () to the right of the title indicates that notes about the document were added by a colleague with annotator rights.

Narrowing a Result

Your search, KeyCite, or KeySearch result may retrieve a large number of your organization’s documents. You can narrow the number of documents to more easily pinpoint those that are the most pertinent.

SEARCH WITHIN RESULTS

To narrow a result using additional terms,

1. Under Narrow in the left column, type your terms in the Search within Results box.
2. Click **Search**.



The screenshot shows a rectangular box with a light gray background. At the top left, the text "Search within results" is displayed in a bold, dark font. Below this, there is a white text input field containing the word "indemnif!". Underneath the input field, the text "Undo search within" is written in a blue, underlined font.

Search within Results box

A terms and connectors search is run, and the new result is displayed.

- Both your original search terms and the terms used to narrow your result are highlighted in the documents. Original terms are highlighted in yellow and your additional (search within) terms are highlighted in blue.
- To remove a search within a result, click **Undo search within**.

FILTERS

To narrow a result using filters, under Narrow in the left column, select values in one or more categories. The available categories depend on your West km configuration. Numbers indicate the number of documents in the result with that value. If no values are selected for a category, all values are displayed.

- To see all values for a category, click **More**.
- To select values from a list, click **Select**. Then click the values you want and click **Continue**.

To find values in the list, type in the text box.

To select a value, click its name. Selected values are displayed to the right under Your Selections.

A list of filter values

- To enter a date value, click the **Date** category, click an option, type the date information as requested, and click **Continue**.

To filter by date, click a date option (e.g., **Date Range**), type the date information as requested, and click **Continue**.

Date filter

The result is updated immediately.

Viewing a Document

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

The screenshot shows the WestlawNext interface for viewing a document. At the top, there is a search bar with the query 'corporation/s agent' and a 'SEARCH' button. Below the search bar, the document title 'Brief for Petitioner Breuer' is displayed, along with metadata: 'File Name: Brief for Petitioner Breuer | Modified Date: 10/10/2007 10:55:00 AM | Author: Kim Garrin | DMS Number: 3137'. The document viewer shows the text of the brief, with several terms highlighted in yellow: 'agency', 'corporation', and 'agency'. Citation links are also present, such as 'Rule 11 of the Federal Rules of Civil Procedure', '5 U.S.C. § 552a(d)(1)', '12 U.S.C. § 1782(d)(2)(A)(i)', '2279aa-3(c)(14)', '28 U.S.C. § 1827', '15 U.S.C. § 1681a', '20 U.S.C. § 5812(i) B', '28 U.S.C. § 1827', and '30 U.S.C. § 1265'. A 'Notes (1)' section is visible at the bottom of the document viewer.

A document

1 Highlighted Terms

If you retrieve a document by searching or using a KeySearch query, the search terms are highlighted in yellow. If you retrieve a document using KeyCite, the references to the cited WestlawNext document are highlighted. The first occurrence of the term is automatically displayed.

2 Browsing Arrows

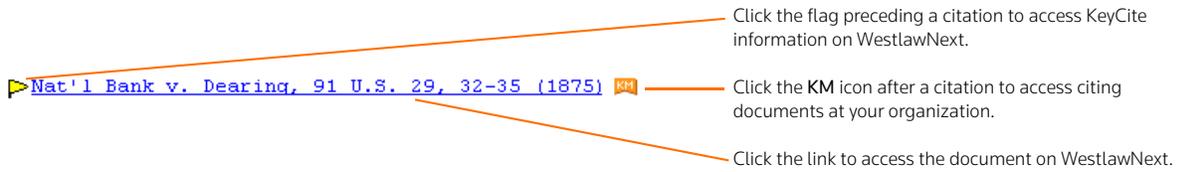
- Document arrows take you to the next or previous document in your result.
- Term arrows take you to the next or previous term in your result. (In a KeySearch result, Term arrows function only for documents retrieved via the KeySearch query.)



Browsing arrows

3 Citation Links and KeyCite Status Flags

- Each citation in the document is a hypertext link to the cited document. To access the cited document on WestlawNext, click the link.
- For each citation that has available KeyCite information, a KeyCite status flag is displayed before the citation. To access additional KeyCite information for the citation on WestlawNext, click the flag.
- For each citation that is referenced in other indexed documents at your organization, a KM icon () is displayed after the citation. To view the citing documents, click the icon.



For more information about KeyCite status flags, see “KeyCite Status Flags” on page 10.

4 Document Details

- To view details about a litigation document, click the **Summary** tab. (Transactions documents have additional tabs available.) For details, see “Viewing Document Details” below.

5 Delivery

- To open a copy of the document in its original format (e.g., Microsoft Word), click the **Load Copy**  icon.
- To print or email the document, click the **Print**  or **Email**  icon and then click an option. For details, see “Printing and Emailing” on page 23.

6 Annotations

- An Exemplar icon ( or ) next to the title indicates that the document has been flagged as a model example by a colleague with annotator rights.
- To view notes about a document that were added by a colleague with annotator rights, click the **Notes** bar at the top of the document.

Viewing Document Details

LITIGATION DOCUMENTS

When you click the **Summary** tab from a document in West km for Litigation, details about the document are displayed.

The screenshot shows the West km interface for a litigation document. At the top, there is a search bar with the text 'corporation /s agent' and a dropdown menu set to 'Litigation and Transactions'. The document title is 'Brief for Petitioner Breuer'. Below the title, there are tabs for 'Document' and 'Summary', with 'Summary' being the active tab. The document details include: File Name: Brief for Petitioner Breuer, Modified Date: 10/10/2007 10:55:00 AM, Author: Kim Garrin, and DMS Number: 3137. The 'Document Profile' section (1) shows the litigation document title. The 'File Profile' section (2) lists metadata such as author, client ID, client name, created date, DMS number, and document type. The 'KeySearch Topics' section (3) lists several topics with red 'x' marks, indicating they are not applicable or not found.

A summary of a litigation document

1 Document Profile

Displays data about the document that was generated by West km during analysis of the document, such as the document title, jurisdiction, court, and document type. To view additional information for attorneys, companies, experts, law firms, or judges, click **Westlaw Profile** following the name.

Note Accessing Westlaw Profiler is a billable transaction if you don't have a subscription.

2 File Profile

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

3 KeySearch Topics

Displays the topics to which the document is assigned. To access the KeySearch hierarchy for a topic, click the topic link.

TRANSACTIONS DOCUMENTS

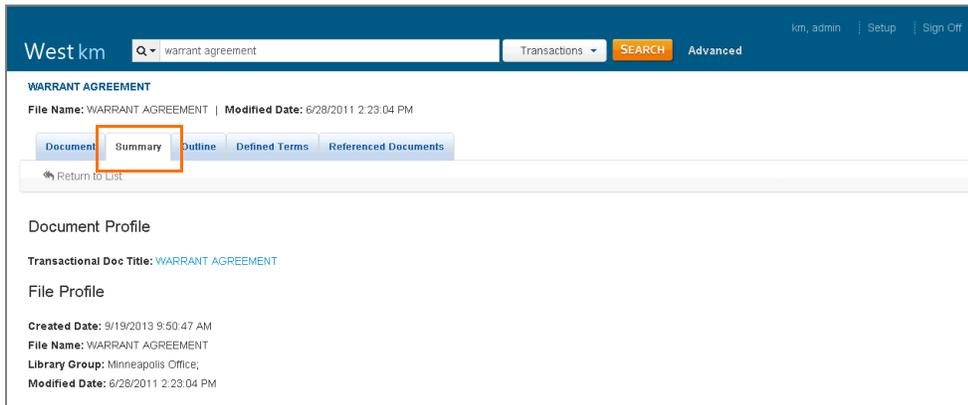
When viewing a document, clause, or defined term, additional details may be available for viewing, including a summary, outline, defined terms listing, and referenced document listing. Click the corresponding tab to display the additional detail.

Note If multiple instances of the same metadata, defined term, or referenced document are found, the item is listed only once. 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.

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.



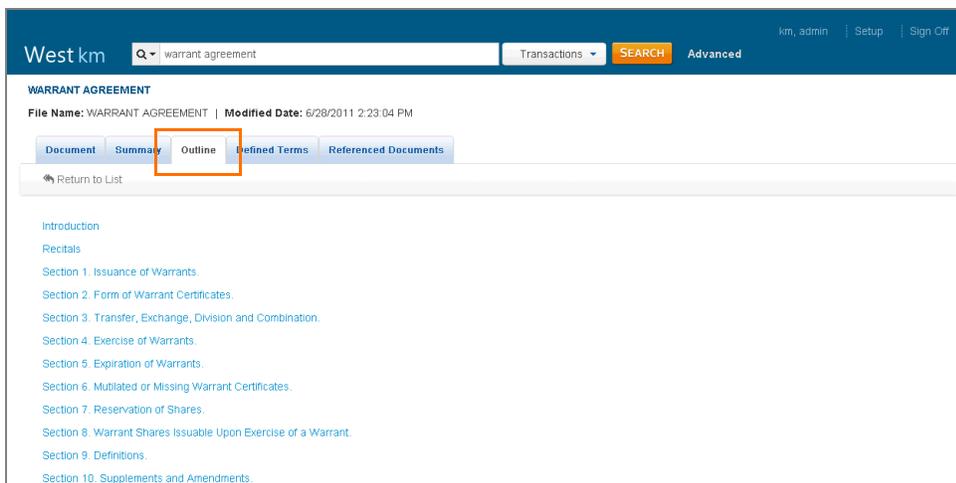
The screenshot shows the West km interface for a document titled "WARRANT AGREEMENT". The document is viewed in the "Summary" tab, which is highlighted with a red box. The interface includes a search bar with "warrant agreement" entered, a "Transactions" dropdown menu, and a "SEARCH" button. Below the search bar, there are tabs for "Document", "Summary", "Outline", "Defined Terms", and "Referenced Documents". The "Summary" tab is selected, and a "Return to List" link is visible. The document profile section displays the following information:

- Transactional Doc Title: WARRANT AGREEMENT
- File Profile
- Created Date: 9/19/2013 9:50:47 AM
- File Name: WARRANT AGREEMENT
- Library Group: Minneapolis Office;
- Modified Date: 6/28/2011 2:23:04 PM

A summary of a transactions document

Outline

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



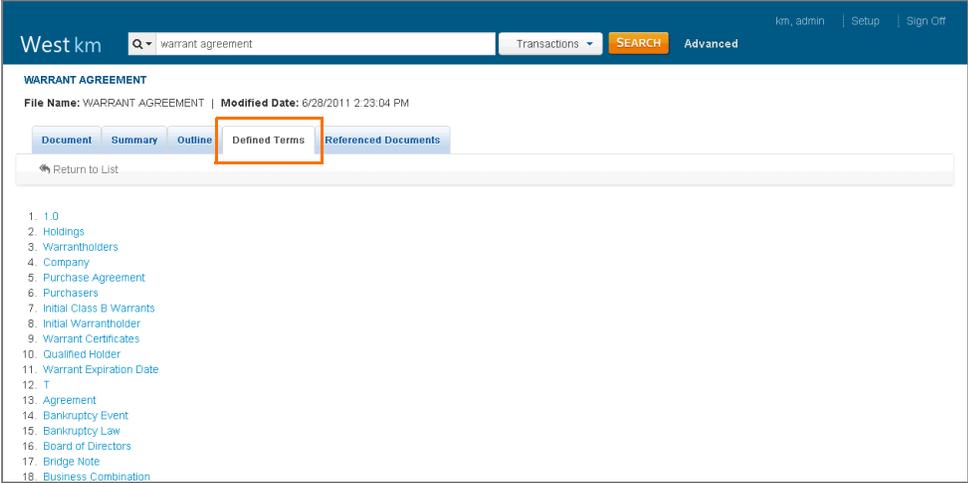
The screenshot shows the West km interface for a document titled "WARRANT AGREEMENT". The document is viewed in the "Outline" tab, which is highlighted with a red box. The interface includes a search bar with "warrant agreement" entered, a "Transactions" dropdown menu, and a "SEARCH" button. Below the search bar, there are tabs for "Document", "Summary", "Outline", "Defined Terms", and "Referenced Documents". The "Outline" tab is selected, and a "Return to List" link is visible. The outline section displays the following sections:

- Introduction
- Recitals
- Section 1. Issuance of Warrants.
- Section 2. Form of Warrant Certificates.
- Section 3. Transfer, Exchange, Division and Combination.
- Section 4. Exercise of Warrants.
- Section 5. Expiration of Warrants.
- Section 6. Mutilated or Missing Warrant Certificates.
- Section 7. Reservation of Shares.
- Section 8. Warrant Shares Issuable Upon Exercise of a Warrant.
- Section 9. Definitions.
- Section 10. Supplements and Amendments.

An outline of a transactions document

Defined Terms

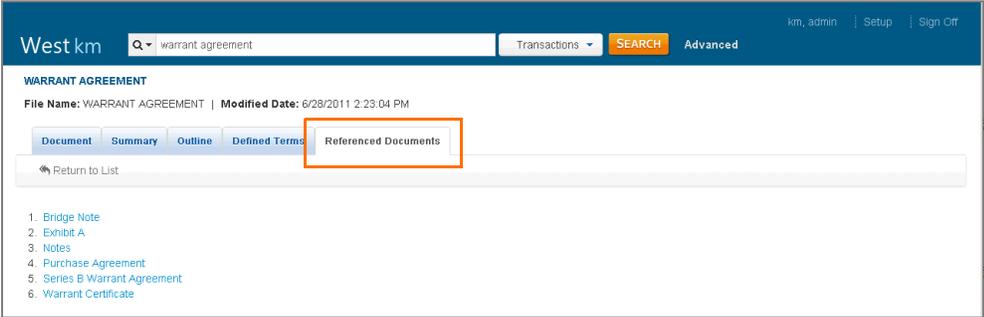
Click a term to jump to its definition in the text of the document or clause.



Defined terms for a transactions document

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.



Referenced documents for a transactions document

Printing and Emailing

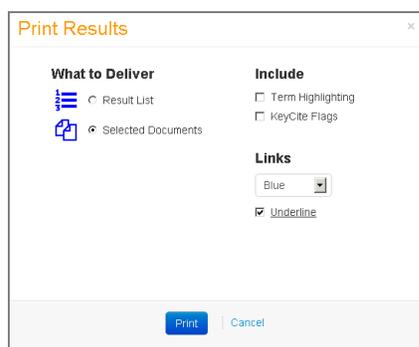
When viewing a document, you can print or email it. When viewing a result, you can print or email the result list or selected documents in it. In West km for Transactions, you can also print clauses and defined terms.

When you print a document, an HTML version is printed. When you email a document, the original file is emailed as an attachment.

PRINTING

To print from a document or result,

1. If you are printing from a result and want to print selected documents, select the check box next to each document in the result that you want to print.
2. Click the **Print**  or **Email**  icon and then click **Print**. The Print dialog box is displayed.



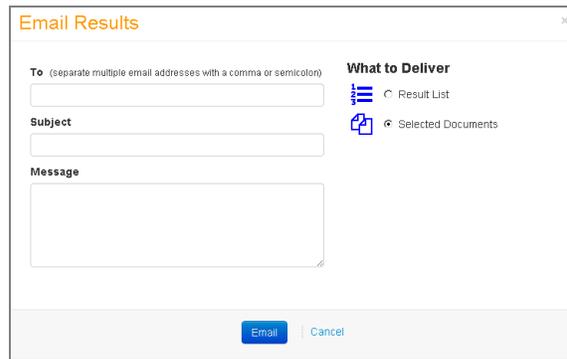
Print dialog box

3. If you are printing from a result, in the What to Deliver section, select whether you want to print the list of documents (Result List) or one or more documents (Selected Documents).
4. In the Include section, select the items that you want to appear in your printout.
5. In the Links section, select whether you want hyperlinks to appear in blue or black text in your printout. If you want the links underlined, select **Underline**.
6. Click **Print**. After a moment, the Print dialog box from your Web browser is displayed.
7. Select a printer and click **Print**.

EMAILING

To email from a document or result,

1. If you are emailing from a result and want to email selected documents, select the check box next to each document in the result that you want to email.
2. Click the **Print**  or **Email**  icon and then click **Email**. The Email dialog box is displayed.



Email Results ✕

To (separate multiple email addresses with a comma or semicolon)

Subject

Message

What to Deliver

Result List

Selected Documents

Email dialog box

3. If you are emailing from a result, in the What to Deliver section, select whether you want to email the list of documents (Result List) or one or more documents (Selected Documents).
4. Complete the email template by typing a recipient email address, a subject, and a message for the top of the printout. If you have multiple recipients, separate the addresses with a comma or semicolon.
5. Click **Email**.

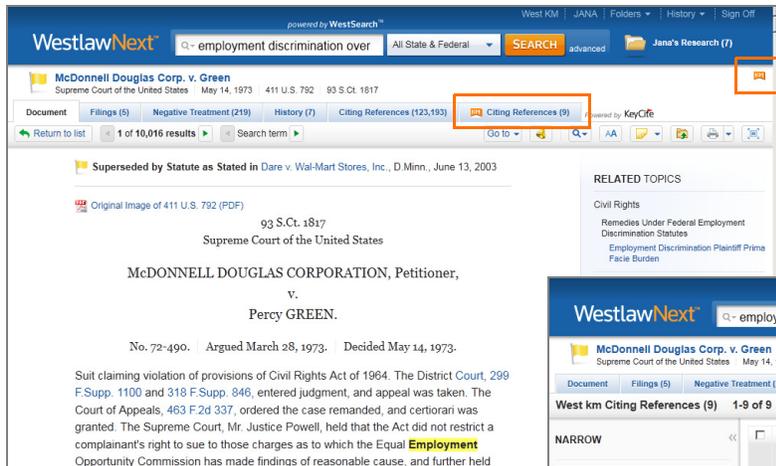
4 Retrieving Citing Documents on WestlawNext

With West km for Litigation, on WestlawNext you can easily find your organization's West km documents that cite WestlawNext documents. The KM icon () indicates that one or more of your organization's documents cite a WestlawNext document.

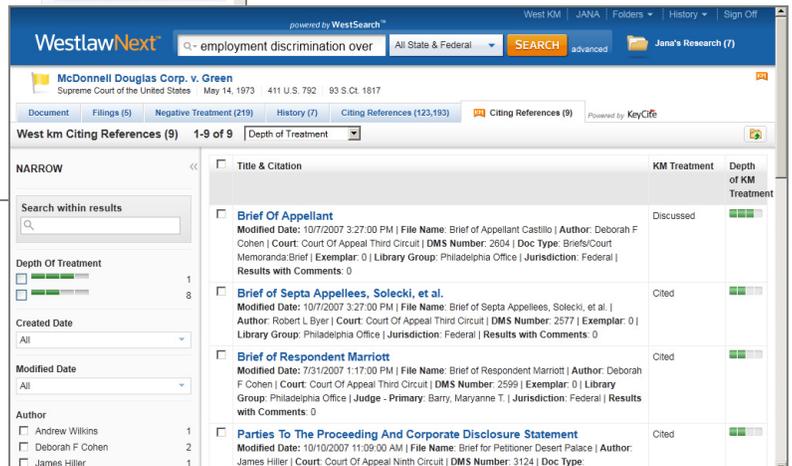
Retrieving Citing Documents from a WestlawNext Document

When you are viewing cases, statutes, regulations, or administrative decisions on WestlawNext, the KM icon () is displayed in the document header (and in the result list) when one of your organization's West km documents includes the citation. To retrieve the documents in your organization that cite the WestlawNext document, click the KM icon () or the **West km Citing References** tab.

Your organization's citing documents are listed by their depth of treatment (see page 9) and then in reverse chronological order on the West km Citing References tab. To view a citing document, click its title.



Click the KM icon or the West km Citing References tab to view your organization's citing documents.



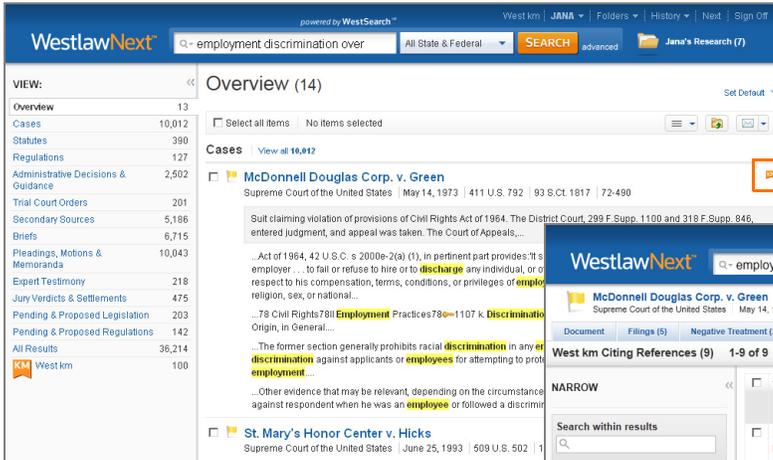
West km citing documents from a WestlawNext document

Retrieving Citing Documents from a WestlawNext Result

When you are viewing a result list on WestlawNext, the KM icon () is displayed next to a document's title when that WestlawNext document is cited in your organization's West km documents.

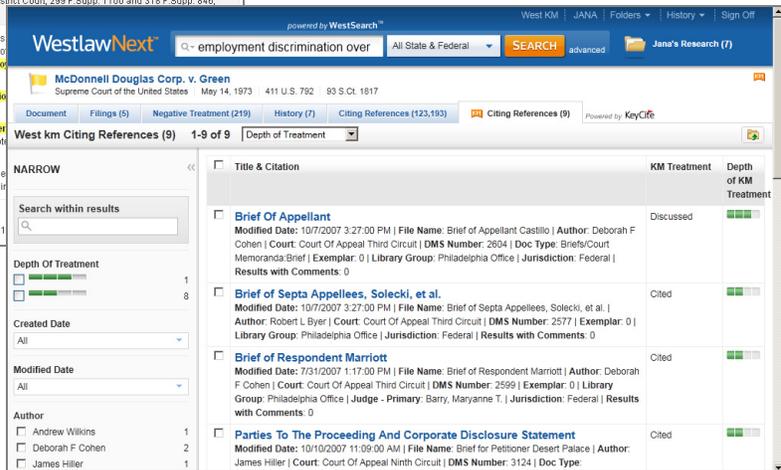
To retrieve the documents in your organization (from all library groups) that cite the WestlawNext document, click the KM icon () next to the document title.

Your organization's citing documents are listed on the West km Citing References tab.



The screenshot shows the WestlawNext interface with a search for "employment discrimination over". The results list includes "McDonnell Douglas Corp. v. Green" and "St. Mary's Honor Center v. Hicks". A red box highlights the KM icon next to the "McDonnell Douglas Corp. v. Green" result.

Click the KM icon next to a document title to retrieve your organization's citing documents.



The screenshot shows the "Citing References" tab for the case "McDonnell Douglas Corp. v. Green". It displays a list of citing documents with columns for "Title & Citation", "KM Treatment", and "Depth of KM Treatment".

Title & Citation	KM Treatment	Depth of KM Treatment
Brief Of Appellant Modified Date: 10/7/2007 3:27:00 PM File Name: Brief of Appellant Castillo Author: Deborah F Cohen Court: Court Of Appeal Third Circuit DMS Number: 2604 Doc Type: Briefs/Court Memoranda/Brief Exemplar: 0 Library Group: Philadelphia Office Jurisdiction: Federal Results with Comments: 0	Discussed	1
Brief of Septa Appellees, Solecki, et al. Modified Date: 10/7/2007 3:27:00 PM File Name: Brief of Septa Appellees, Solecki, et al. Author: Robert L Byer Court: Court Of Appeal Third Circuit DMS Number: 2577 Exemplar: 0 Library Group: Philadelphia Office Jurisdiction: Federal Results with Comments: 0	Cited	1
Brief of Respondent Marriott Modified Date: 7/31/2007 1:17:00 PM File Name: Brief of Respondent Marriott Author: Deborah F Cohen Court: Court Of Appeal Third Circuit DMS Number: 2599 Exemplar: 0 Library Group: Philadelphia Office Judge - Primary: Barry, Marjanne T. Jurisdiction: Federal Results with Comments: 0	Cited	1
Parties To The Proceeding And Corporate Disclosure Statement Modified Date: 10/10/2007 11:09:00 AM File Name: Brief for Petitioner, Desert Palace Author: James Hiller Court: Court Of Appeal Ninth Circuit DMS Number: 3124 Doc Type:	Cited	1

West km citing documents from a WestlawNext result list

5 Searching Documents on WestlawNext

With West km for Litigation, when you run a search on WestlawNext, your organization's West km documents are automatically included in the result. You can also search only your organization's West km documents on WestlawNext.

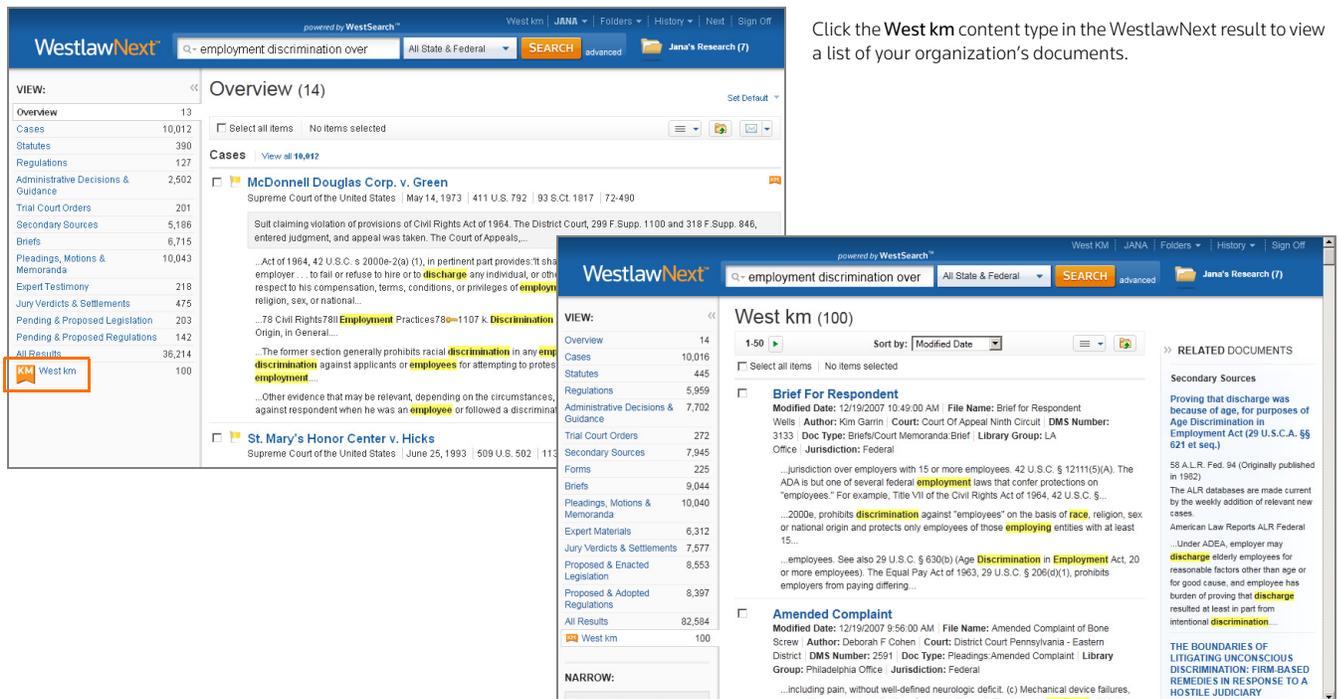
Accessing West km Documents from a WestlawNext Result

To access your organization's West km documents from a WestlawNext result, complete these steps:

1. On WestlawNext, perform a search as you normally would.
2. In the left column on the results page, click the **West km** content type.

Note Your organization may have a customized name for the West km content type.

Your organization's documents resulting from the search are listed in the center column.



West km documents from a WestlawNext search

Note When simultaneously searching WestlawNext documents and your organization's documents, field restrictions and concepts you have specified to be included or excluded in retrieved WestlawNext documents won't be used to search your organization's documents. For example, the WestlawNext title field search **ti(mcdonnell)** is converted to the term **mcdonnell** when your organization's documents are searched.

Searching Only West km Documents on WestlawNext

You can search only your organization's West km documents on WestlawNext. You can search all your West km content or search within a particular library group.

SEARCHING ALL WEST KM CONTENT

To search across all your organization's West km content on WestlawNext, complete these steps:

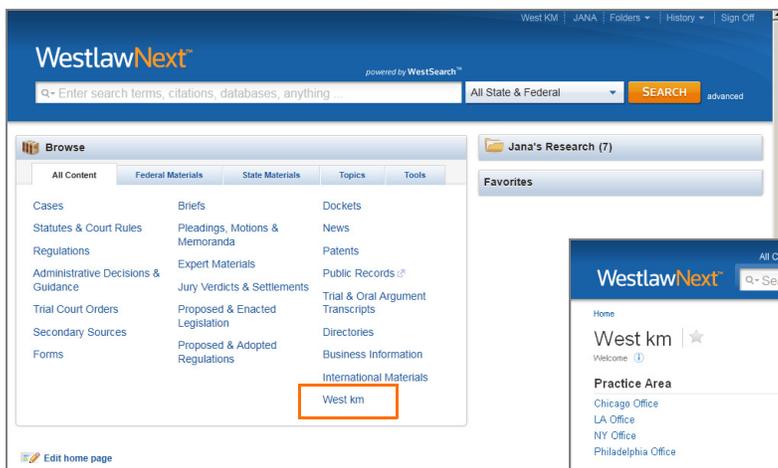
1. On the WestlawNext home page, click **West km** on the All Content tab.

Note Your organization may have a customized link name.

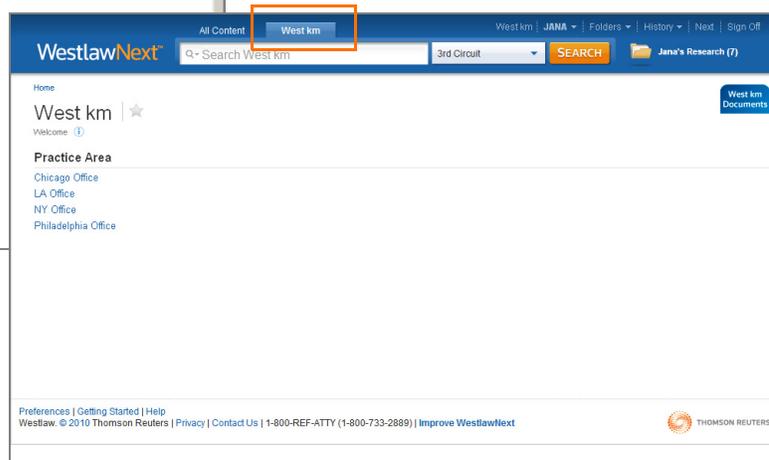
2. In the search box at the top of the West km page, type your query. You can enter simple descriptive terms or a query with terms and connectors.

If you enter a terms and connectors query, you can restrict all or part of your search to specific document metadata. For a list of field restrictions that may be available to you, see "Field Restrictions" on page 37.

3. Click **Search**.



Click the **West km** category on the WestlawNext home page to search your organization's documents.



The West km category on WestlawNext

The documents matching your search criteria are displayed in the center column. For details, see "Browsing Results on WestlawNext" on page 30.

Note You can save your organization's West km database as a favorite. On the West km page, click **Add to Favorites**.

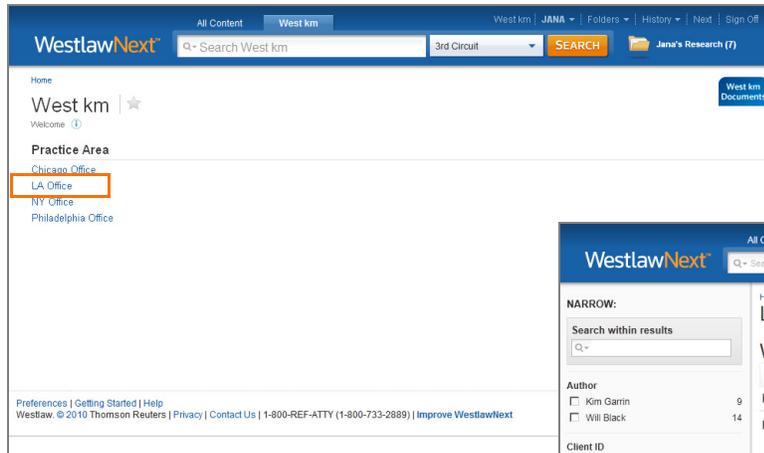
SEARCHING A WEST KM LIBRARY GROUP

To search a particular West km library group on WestlawNext, complete these steps:

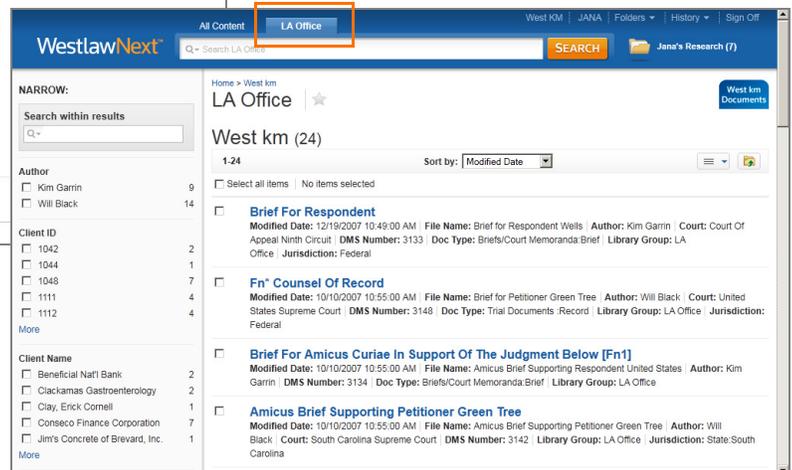
1. On the WestlawNext home page, click **West km** on the All Content tab.
2. On the West km page, click the library group you want to search.

The West km documents within the selected library group are listed in the center column.

3. To search within the selected library group, type your query in the search box at the top of the West km library group page and click **Search**.



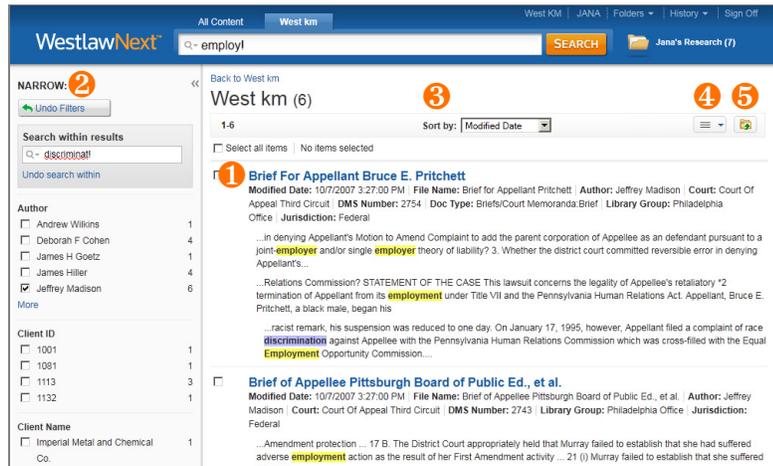
Click a library group on the West km page to access documents and to search within the library group.



A West km library group on WestlawNext

6 Browsing Results on WestlawNext

With West km for Litigation, you can browse West km results on WestlawNext similar to other document results.



A West km result on WestlawNext

1 View a Document

View a West km document by clicking its title. For details, see “Viewing a West km Document” on page 32.

2 Narrow with Filters

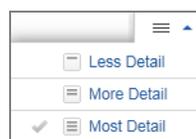
Narrow your West km result by searching within a result or by using filters. For details, see “Narrowing Your West km Result with Filters” on page 32.

3 Sort

Change the sort order of the result list by choosing a category.

4 Detail Selector

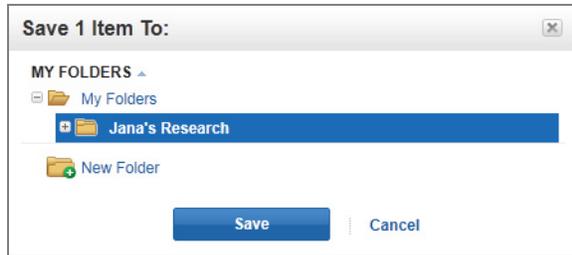
Choose the level of detail displayed for documents in the result list.



Detail selector

5 Save to Folder

Save a West km document to a folder. Select the document, click the **Save to Folder** icon (📁➕), choose the folder you want, and click **Save**. (You can also click and drag the document title to your research folder.)



Save to folder

Note West km documents that have been added to folders in WestlawNext may not be available if the document was deleted, the document was moved to a different West km collection, or user rights to the document have changed.

For additional information about browsing results on WestlawNext, see the Documentation articles in the WestlawNext Help Center.

Viewing a West km Document

To view one of your organization's retrieved West km documents on WestlawNext, click its title.



A West km document on WestlawNext

1 Summary

To view details about the document, click the **Summary** tab.

2 Previous/Next Navigation

To navigate through documents or search terms in your result, click the navigation arrows (← →). To return to your result list, click **Return to List**.

3 Load Copy

To work with the document, click the **Load Copy** icon (📄). A copy of the document in its original format (e.g., Microsoft Word) is displayed, allowing you to edit or save the document as you normally would.

4 Save to Folder

To save a document so you can easily refer to it later, click the **Save to Folder** icon (📁), choose the folder you want, and click **Save**.

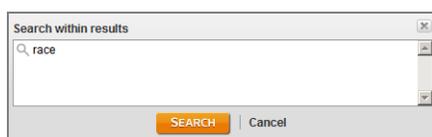
Narrowing Your West km Result with Filters

You can narrow your West km result on WestlawNext by searching within a result or by using filters.

SEARCHING WITHIN RESULTS

To narrow a result using additional terms, complete these steps:

1. Under Narrow in the left column, type your terms in the Search within Results box.
2. Click **Search**.



Search within Results box

A terms and connectors search is run, and the new result is displayed.

- Both your original search terms and the terms used to narrow your result are highlighted in the documents. Original terms are highlighted in yellow and your additional (search within) terms are highlighted in purple.
- To remove a search within a result, click **Undo Search Within**.

USING FILTERS

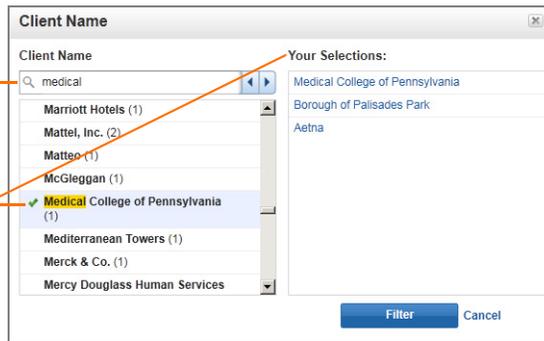
To narrow a result using filters, under Narrow in the left column, select values in one or more categories. Numbers indicate the number of documents in the result with that value.

The result is updated immediately. If no values are selected for a category, all values are displayed.

- To see all values for a category, click **More**.
- To select values from a list, click **Select**. Then click the values you want and click **Filter**.

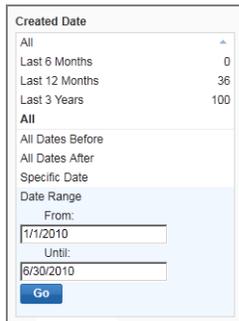
To find values in the list, type in the text box.

To select a value, click its name. Selected values are displayed to the right under *Your Selections*.



A list of filter values

- To enter a date value, click the **Date** category, choose an option, type the date information as requested, and click **Go**.



To filter by date, choose a date option (e.g., **Date Range**), type the date information as requested, and click **Go**.

Date filter

- The available categories depend on your West km configuration.

7 Reference Listing

Connectors and Special Characters

Using Connectors

Use connectors to specify the relationships that must exist between the terms in your retrieved documents.

Type:	To retrieve documents that contain the following:
& (AND)	Both search terms
a space (OR)	Either search term or both terms
/p	Search terms in the same paragraph
/s	Search terms in the same sentence
+s	The first term preceding the second within the same sentence
/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 term preceding the second within <i>n</i> terms of each other (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 that contain the following:
% (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 different endings.

Type:	To retrieve:
gr*w	<i>grew</i> <i>grow</i>
contribut!	<i>contributed</i> <i>contributor</i> <i>contributing</i> <i>contribution</i> <i>contributory</i>

Note Plural and possessive words 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, enter it with periods and without spaces to retrieve all variations.

Type:	To retrieve:
whistle-blow	<i>whistleblow</i> <i>whistle-blow</i> <i>whistle blow</i>
h.i.v.	<i>H.I.V.</i> <i>H. I. V.</i> <i>HIV</i> <i>H I V</i>

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 preceding the term.

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

Search Box Rules

When using the search box at the top of the West km interface, the following rules apply:

- The following connectors and special characters in a search trigger a terms and connectors search:
 - /p (and +p)
 - /s
 - +s
 - /n
 - +n
 - %
 - *
 - !
 - #
 - field restrictions, e.g., DOCTI()
- The following connectors and special characters in a search do *not* trigger a terms and connectors search in the absence of other connectors and special characters:
 - AND (&)
 - OR (a space)
 - quotation marks

Field Restrictions

Litigation field restrictions

Field	Abbreviation	Examples
Attorney (Lit)	at	at(nelson)
Company	comp	comp(microsoft)
Court	co	co(united states supreme court)
Doc Type	docty	docty(brief)
Expert	ex	ex(martinez)
Judge-Primary ¹	jp	jp(anderson /3 barry)
Judge-Secondary ¹	js	js(halbrooks)
Jurisdiction	jur	jur(federal)
Law Firm (Lit)	lf	lf(bendini & lambert)
Litigation Doc Title	docti	docti("dole food" /5 patrickson)

1. To search for a judge's name in both judge fields simultaneously, type `jp,js(judgename)`, e.g., `jp,js(halbrooks)`.

The court, doc type, and jurisdiction fields are phrase indexed, so you must search for the terms exactly, including punctuation and spacing. As an alternative to typing the complete exact phrase, you can use the root expander (!) at the end of the term, e.g., `docty(memo!)`.

Transactions field restrictions

Field	Abbreviation	Example
Transactional Doc Title	tdocti	tdocti(purchase /5 agreement)
Clause Title	clti	clti("partner liability")
Defined Term Title	dtti	dtti(seller)
Attorneys (Trans)	at	att(john /3 smith)
Law Firm (Trans)	tlf	tlf(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*).

West km annotation and library group field restrictions

Field	Abbreviation	Examples
Exemplar Documents and Exemplar Forms	exem	exem(1) Use one of these values in the parentheses: 0 = no marking 1 = exemplar document marking 2 = exemplar form marking

West km annotation and library group field restrictions

Field	Abbreviation	Examples
Notes	annos	annos(power +3 attorney)
Results with Notes	com	com(true) Use one of these values in the parentheses: <i>true</i> = has notes <i>false</i> = has no notes
Library Group	lg	lg("ny office")

Profile field restrictions

Field ¹	Abbreviation	Examples
Abstract	abst	abst("motion to dismiss")
Author	au	au(john /3 maxwell)
Client ID	cid	cid(1587)
Client Name	cn	cn(reardon)
Client-Matter ID	cmid	cmid(1587-2228)
Client-Matter Name	cmn	cmn(reardon & pritchard)
DMS Doc Type	dt	dt(brief or memo!)
DMS Number	dn	dn(32027)
File Name	ti	ti(nevada & blueson)
Matter ID	mi	mi(1587-2228)
Matter Name	mn	mn(pritchard)
Created Date ²	cd	specific date: cd(1/14/2011) after: cd(aft 1/14/2011) before: cd(bef 1/30/2011) after & before: cd(aft 12/12/2007 & bef 1/1/2011)
Modified Date ²	md	specific date: md(2/14/2011) after: md(aft 2/14/2011) before: md(bef 2/27/2011) after & before: md(aft 12/12/2007 & bef 1/1/2011)
Custom 1 ³	cus1	cus1(antitrust)
Custom 2	cus2	cus2(expert!)
Custom 3	cus3	cus3("form-agrmt-lit")
Custom Bool	cusb	cusb(search! /3 seiz!)
Custom Date	cusd	cusd(aft 12/31/2012)
Custom Int	куси	куси(84927)

1. The availability of fields depends on your organization's metadata.

2. The Created Date and Modified Date fields are not inclusive when you search a range of documents. For example, if you search for documents modified after 1/1/2010, documents modified on January 1, 2010, won't be retrieved.

3. 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.

Note These field restrictions are available only when you search your organization's documents. When simultaneously searching WestlawNext documents and your organization's documents, (1) these field restrictions are not available, and (2) field restrictions you have specified for your WestlawNext documents are converted to regular terms when you search your organization's documents.

Dates

Dates are recognized when entered in any of the following formats:

- November 1, 2012
- Nov 1 2012
- Nov. 1, 2012
- 11-1-2012
- 11/1/2012
- 1 Nov 2012
- 1 November 2012

Include or Exclude Terms

This text box:	Uses this rule:
All of these terms	% (AND) is the default connector for terms separated by spaces
Any of these terms	OR is the default connector for terms separated by spaces
This exact phrase	quotation marks enclose terms separated by spaces
Exclude documents that have	% (BUT NOT) is placed before the entered terms; OR is the default connector for terms separated by spaces

If connectors or special characters are entered that are inconsistent with the defaults, the defaults are overridden.

Index

SYMBOLS

- ! root expander 35
- * universal character 35

A

- abbreviations 36
- accessing West km 2
- annotator rights 1, 3, 14, 16, 19
- arrows, navigation 32
- attorney, searching by 37
- author, searching by 38
- automatic classification 11

B

- bars, depth of treatment 9
- blue H flag 10
- BriefTools 1
 - See Drafting Assistant
- browsing
 - arrows 18, 32
 - KeySearch topics 11
 - result lists 13, 30

C

- C flag 10
- categorization and recommendation engine (CaRE) 11
- characters, special 35
- citations 8, 18
- Cited definition 9
- citing documents
 - depth of treatment 9
 - from a West km document 9
 - from a WestlawNext document 25
 - from a WestlawNext result list 26
 - from KeyCite 8
- Citing References tab 25, 26
- classification
 - automatic 11
 - manual 11
- clause
 - definition 3
 - title, searching by 37
- comments
 - searching by 38
 - See notes
- compound words 36
- connectors 35
- copying documents 19, 32
- counts of KeySearch documents 11
- created date, searching by 38

D

- date, searching by 38
- defined term
 - definition 3
 - in document summary 22
 - title, searching by 37
- depth of treatment 9
- Discussed definition 9
- DMS file profile 21
- Doc arrow 18
- document number, searching by 38
- document title, searching by 37
- document type, searching by 38
- documents
 - browsing 13, 32
 - copying 19, 32
 - counts in KeySearch 11
 - definition 3
 - emailing 23, 24
 - on WestlawNext 25, 27, 30, 32
 - outline 21
 - printing 13, 15, 19, 23
 - profile 21
 - retrieving with KeyCite 8, 25
 - saving 32
 - searching
 - in West km interface 4
 - on WestlawNext 27, 28
 - with KeySearch 11
 - sort order 13, 15, 30
 - summaries 19, 20, 21, 32
 - viewing 18, 30, 32
 - See also citing documents
- Drafting Assistant 1

E

- emailing 23, 24
- Examined definition 9
- exclude terms 8, 39
- exemplar marking 14, 16, 19, 37

F

- features in West km 1
- field restrictions 6, 27
- file name, searching by 38
- filtering results 16, 30, 32
- Filters 16, 30, 32
- finding
 - See searching
- flags

See KeyCite status flags

folders 32

full-text searching

See searching

G

getting started 1

governing law, searching by 37

green C flag 10

H

H flag 10

help 2

hierarchy, KeySearch 11

hyperlinked citations 18

hyphenated words 36

I

icon

exemplar 14, 16, 19

KM citing references icon 10, 18, 25, 26

notes 14, 16

print or email 13, 15, 19, 23, 24

include terms 8, 39

interfaces 2

internal documents, searching 4, 28

introduction 1

K

KC flag 10

KeyCite

depth of treatment 9

retrieving citing documents 8

status flags 8, 18

KeySearch

document counts 11

in West km interface 11

topics in summaries 20

KM citing references icon 10, 18, 25, 26

knowledge management

See West km

L

law firm, searching by 37

library groups 5, 7, 11

Load Copy 19, 32

M

manual classification 11

matter ID, searching by 38

Mentioned definition 9

modified date, searching by 38

N

natural language searching 4

navigation arrows 32

note icon 14, 16

notes 14, 16, 19

searching by 38

viewing

O

opening documents 19, 32

operators, in searching 35

outline, document 21

P

parties, searching by 37

password 2

plurals 35

possessives 35

printing 13, 15, 19, 23

profile of document 20, 21

Q

querying

See searching

R

red flag 10

red KC flag 10

referenced documents, viewing 22

requirements 2

restricting results

See filtering results

restrictions

field 6

library groups 5

See also Filters

result list

browsing 13, 30, 32

emailing 23, 24

printing 13, 15, 19, 23

restricting with Filters 16, 30, 32

sort order 13, 15, 30

WestlawNext 27

retrieving documents with KeyCite 8, 25

See also searching

root expander (!) 35

S

saving documents 32

searching

internal documents only 4, 28

natural language 4

on WestlawNext 27

terms and connectors 4, 11

- with filters 16, 32
- with KeySearch 11
- See also* result list
- See also* retrieving documents with KeyCite

signing on 2

sort order

- in West km interface 13, 15
- on WestlawNext 30

special characters 35

stars, depth of treatment 9

status flags

- See* KeyCite status flags

summaries of documents 19, 20, 21, 32

symbols, in searching 35

syntax for searching 35

system requirements 2

T

Term arrow 18

terms and connectors searching

- advanced search 6
- basic search 4
- field restrictions 7
- in KeySearch 11
- include or exclude terms 8, 39
- within results 16, 32

title, searching by 38

U

universal character (*) 35

username 2

V

variant endings 35

viewing

- document summaries 19, 20
- documents 18, 30, 32
- notes 14, 16, 19
- summary 21

W

West km

- accessing 2
- depth of treatment 9
- documents
 - See* documents
- features 1
- getting started 1
- interface 2
- KeyCite flags 8
- on WestlawNext 2
- requirements 2
- signing on 2
- See also* Drafting Assistant

West km Citing References tab 25, 26

West km icon

- See* KM citing references icon

West km interface

- searching in 4
- using KeyCite 8
- using KeySearch in 11

WestlawNext 1

- interface 2
- result list 27, 30
- retrieving internal documents 25, 27, 28
- viewing internal documents 30, 32

wildcard characters 35

word processor interface

- See* Drafting Assistant

Y

yellow flag 10

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