

# Using West km for Transactions

Use West km for Transactions to search, view, and print your organization’s internal transactional documents. Search results include summaries, comments by colleagues, and exemplar indicators to help you quickly identify relevant content. You can also access West km for Transactions in West BriefTools®, which allows you to search for model agreements, forms, and filings, and then copy text from them into your draft documents in Microsoft® Word or Corel® WordPerfect®.

For search assistance, call West km Technical Support at 1-888-Westkm1 (1-888-937-8561), option 3.

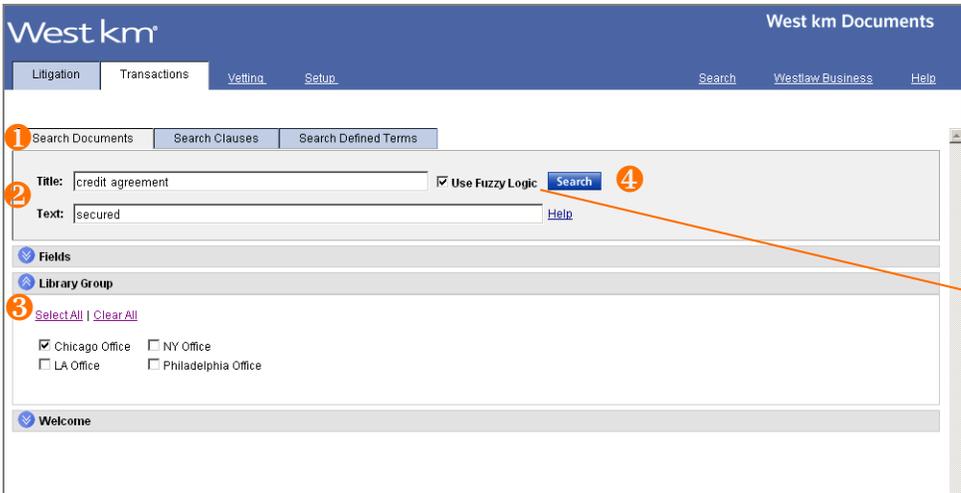
## Searching Transactional Documents

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.

## Running a Search

To run a search, complete these steps:

1. Click the tab for the type of content you want to retrieve, e.g., **Search Documents**.
2. Type your search terms in the *Title* or *Text* text boxes, e.g., **credit agreement**, depending on whether you want to search by text, title, or both. By default, the *and* connector† is used between terms.
3. To restrict all or part of your search to specific library groups, such as office locations or practice areas, click the **Library Groups** panel and then select or clear the library group check boxes to include or exclude them from the search.
4. Click **Search**.



1. Click a search tab.
2. Type your terms in the text boxes.
3. Select library groups.
4. Click **Search**.

When the **Use Fuzzy Logic** check box is selected, title searches automatically retrieve synonyms and related concepts for your search terms.

### The Search Documents tab

\* Concept title searching is turned on when the Use Fuzzy Logic check box is selected on a search tab. If you do not see the Use Fuzzy Logic check box, this feature is not available at your organization.

† You can also use other connectors and special characters to change relationships between your search terms and retrieve variations of search terms. For more information, see the *West km for Transactions User Guide*.

## Using Field Restrictions

Use the Fields panel on a search tab when you know details about the transactional documents you want to retrieve, such as document analysis and DMS field criteria, e.g., party name, matter ID, abstract. Enter as much or as little information as you know in the fields. By default, the *and* connector is used to connect terms in a field and to connect multiple fields\*.

To run a search that uses field restrictions, click the **Fields** panel on a search tab. Then type information in one or more fields and click **Search**.

To restrict your search, type information in one or more fields on the Fields panel.

The Fields panel

## Viewing the Result List

The result list displays the documents, clauses, or defined terms retrieved by your search. The first three search terms and surrounding text are shown in the result list to help you find relevant content. To view the full text of a document, clause, or defined term, click its title.

To modify your search, click **Edit Search**.

To reduce the size of the result, click **Limit Results**, and then choose a restriction.

To view the full text of a document, clause, or defined term, click its title. To view all sections of a document, click **Summary**.

To change the order of the result list, click **Sort By**, and then choose a category.

The result list for a document search

\* You can also use other connectors and special characters to change relationships between your search terms and retrieve variations of search terms. For more information, see the *West km for Transactions User Guide*.

## Viewing a Document, Clause, or Defined Term

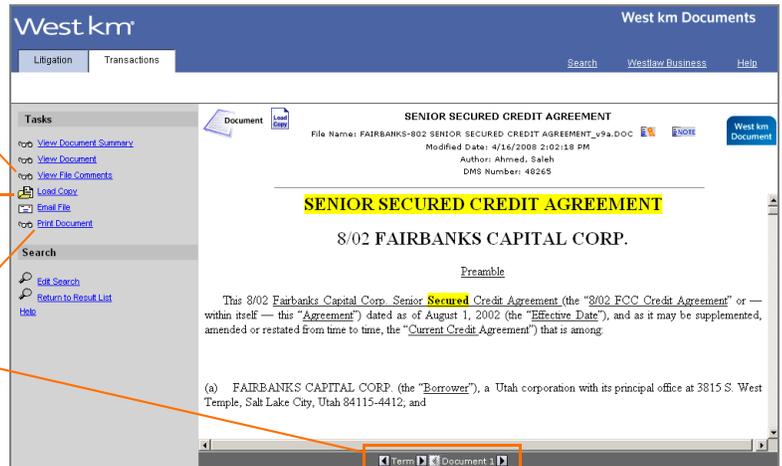
After you click a title in the result list, the section of text containing the first occurrence of your search terms is displayed in the right frame. Options for working with the document, clause, or defined term are displayed under *Tasks* in the left frame. Exemplar documents, clauses, and defined terms and exemplar forms are marked with an icon (E or E); click an icon to read comments that can help you evaluate the model language, clause, or definition.

To display comments about the document\*, click the **Note** icon in the document header or click **View File Comments**.

To open a copy of the DMS file† containing the document, click **Load Copy**. Once the file is open, you can edit and save it.

To print a displayed document, clause, or defined term, click the **Print** link.

To view the next or previous term in your search result, click a **Term** arrow. To view the next or previous document in your search result, click a **Document** arrow.



A transactional document

## Viewing a Summary

To view a summary of a document, clause, or defined term, click **Summary** next to the title in the result list or click the **View Summary** link (e.g., **View Document Summary**) in the *Tasks* list. The summary includes profile metadata about the document and an outline, as well as links to defined terms, referenced documents, and sections of the summary.

To view metadata about a document, click **View Document Summary**.

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



A transactional summary

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

† The file that is stored in your organization's document management system (DMS) is loaded and e-mailed in its original format, e.g., a Microsoft Word document, when you click **Load Copy** or **Email File**.

## Using West km for Transactions with Your Word Processor

With West km for Transactions in West BriefTools, you can search your organization's transactional documents while working on a draft document in Microsoft Word or Corel WordPerfect.

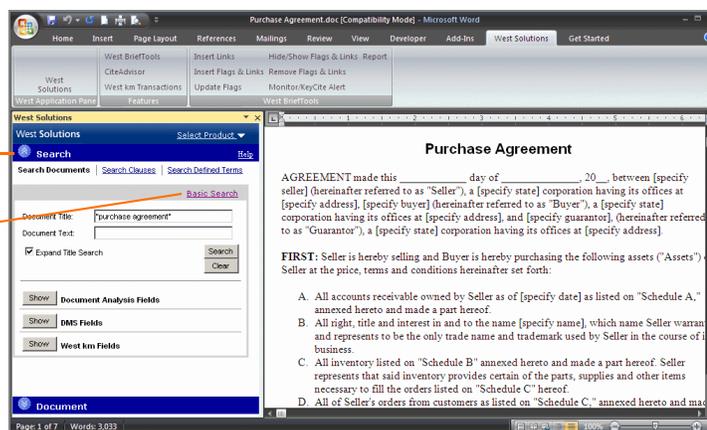
To access West km Transactions in West BriefTools, complete these steps:

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**.

The Search pane is displayed.

In the Search pane, click a content type, select a search option, type one or more terms in the text boxes, and click **Search**.

To change search templates, click **Basic Search** or **Advanced Search**.



The Search pane in the West km for Transactions window

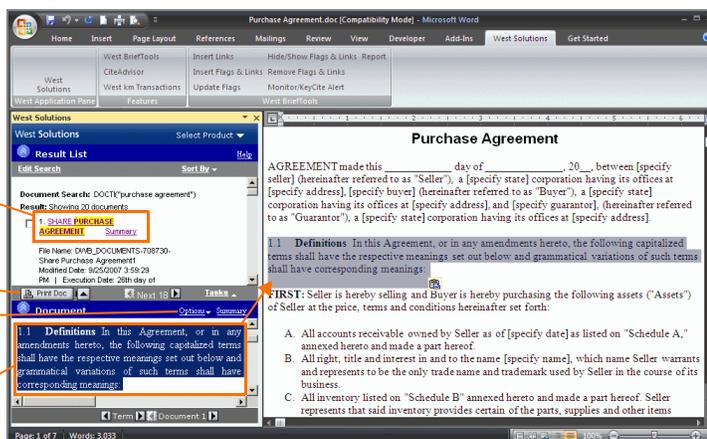
From a result, you can easily copy and paste text from an existing document, clause, or defined term into your draft document. Select the section of the text you want to copy and drag the text selection into your draft document.

To display the full text of the document in the pane below, click a title in the result list. To view all sections of the document, click **Summary**.

To print the result list, click **Print Doc**.

To print the document, to e-mail or open the DMS file, or to view comments about the document, click **Options**.

To use text from a retrieved document, clause, or defined term, drag selected text into your draft document.



A result in the West km for Transactions window

