



DRAFTING ASSISTANT - ESSENTIAL USER GUIDE

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1 About Drafting Assistant Essential

The Thomson Reuters Drafting Assistant suite of productivity tools provide easy access to information, research, authority, and tools to help you draft legal documents. With Drafting Assistant, you can produce your best work and shave hours off the drafting process. With Drafting Assistant, you can:

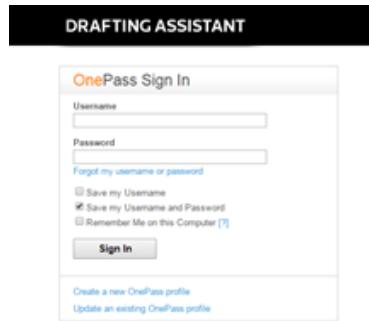
- Insert **KeyCite** flags for easy review and citation verification using the **Flags & Links** and **WestCheck** tools (see "About Flags & Links" on page 14 and "About WestCheck" on page 17 for more information).
- Ensure correct citation formatting using *The BlueBook*, *ALWD*, or other jurisdiction-specific rules, with the **Cite Formatting** tool (see "About Cite Formatting" on page 3 for more information).
- Insert a table of authorities into your documents with the **TOA Builder** tool (see "About TOA Builder" on page 12 for more information).
- Check the status of your citations in KeyCite using **WestCheck** (see "Checking Citations" on page 18 for more information).
- Create a Cited Decisions list of cases cited by your case in **WestCheck** (see "Creating a Citations List" on page 20 for more information).
- Use WestCheck to access **QuoteRight** to verify the accuracy of quotations in your documents (see "Verifying Quotations with QuoteRight" on page 21 for more information).

Save hours of drafting time and speed up the review process with every brief, memorandum, or other legal document you draft. For detailed instruction on working with the Drafting Assistant tools, see:

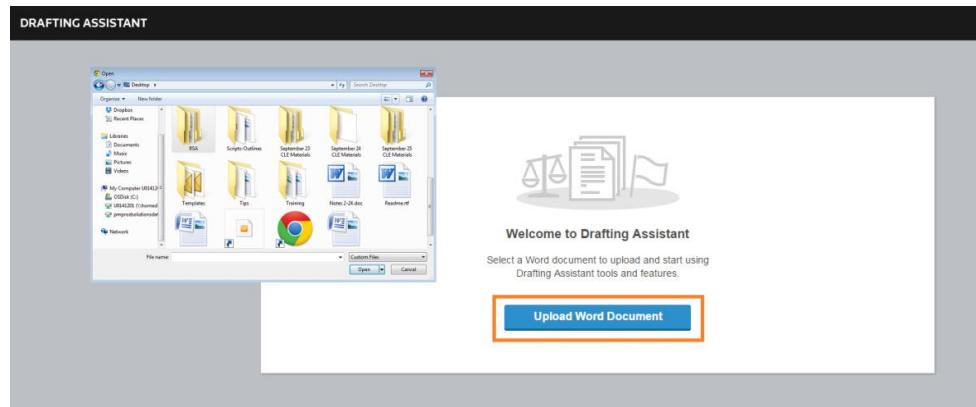
- "About Cite Formatting" on page 3
- "About Deal Proof" on page 8
- "About TOA Builder" on page 12
- "About Flags & Links" on page 14
- "About WestCheck" on page 17

Accessing Drafting Assistant Essential

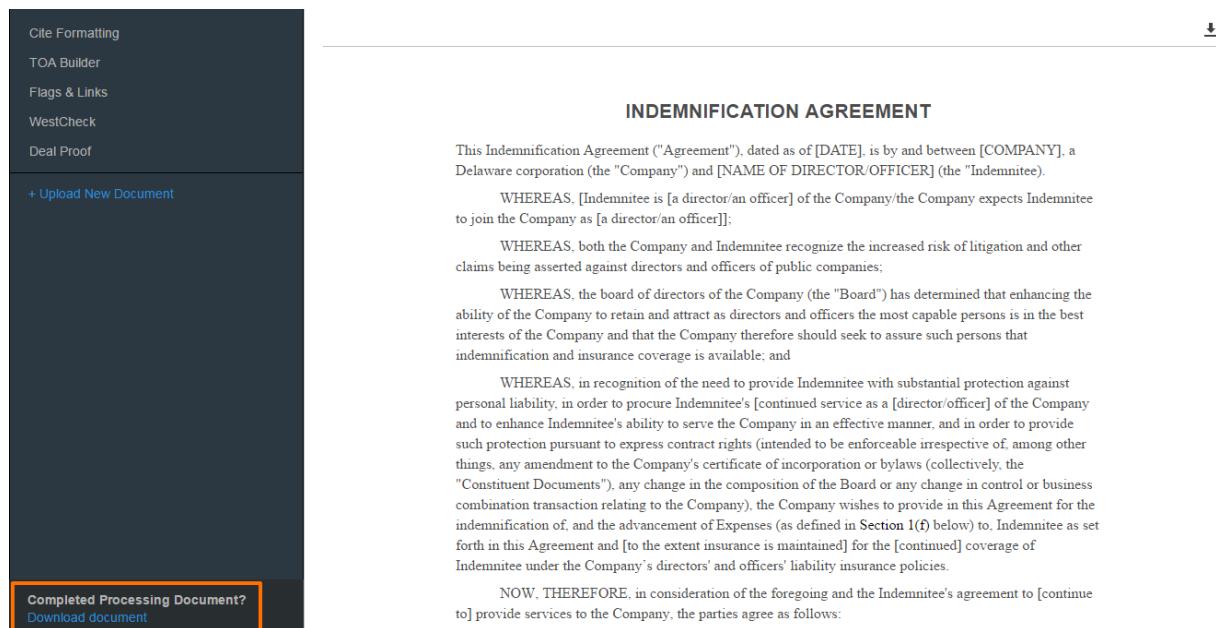
You can access Drafting Assistant Essential from drafting.westlaw.com. Sign in with your OnePass credentials.



You will be prompted to upload a document and browse to the location of the document you are drafting.



Once you launch Drafting Assistant, the available tools display in the left pane alongside your document.



The screenshot shows the Drafting Assistant interface. On the left, a dark sidebar lists tools: Cite Formatting, TOA Builder, Flags & Links, WestCheck, Deal Proof, and a blue '+ Upload New Document' button. At the bottom of this sidebar is a red-bordered box containing the text 'Completed Processing Document?' and 'Download document'. The main document area on the right is titled 'INDEMNIFICATION AGREEMENT'. The text within the document discusses the purpose of the agreement, the board's determination to enhance the Company's ability to retain capable persons, and the provision of protection against personal liability for Indemnitee. It also mentions the advancement of expenses and the parties' agreement to provide services to the Company.

INDEMNIFICATION AGREEMENT

This Indemnification Agreement ("Agreement"), dated as of [DATE], is by and between [COMPANY], a Delaware corporation (the "Company") and [NAME OF DIRECTOR/ OFFICER] (the "Indemnitee").

WHEREAS, [Indemnitee] is [a director/an officer] of the Company/the Company expects Indemnitee to join the Company as [a director/an officer];

WHEREAS, both the Company and Indemnitee recognize the increased risk of litigation and other claims being asserted against directors and officers of public companies;

WHEREAS, the board of directors of the Company (the "Board") has determined that enhancing the ability of the Company to retain and attract as directors and officers the most capable persons is in the best interests of the Company and that the Company therefore should seek to assure such persons that indemnification and insurance coverage is available, and

WHEREAS, in recognition of the need to provide Indemnitee with substantial protection against personal liability, in order to procure Indemnitee's [continued service as a [director/officer] of the Company and to enhance Indemnitee's ability to serve the Company in an effective manner, and in order to provide such protection pursuant to express contract rights (intended to be enforceable irrespective of, among other things, any amendment to the Company's certificate of incorporation or bylaws (collectively, the "Constituent Documents"), any change in the composition of the Board or any change in control or business combination transaction relating to the Company), the Company wishes to provide in this Agreement for the indemnification of, and the advancement of Expenses (as defined in Section 1(f) below) to, Indemnitee as set forth in this Agreement and [to the extent insurance is maintained] for the [continued] coverage of Indemnitee under the Company's directors' and officers' liability insurance policies.

NOW, THEREFORE, in consideration of the foregoing and the Indemnitee's agreement to [continue to] provide services to the Company, the parties agree as follows:

After reviewing your draft, you can select the download options in the top right or bottom left corners of the screen.

2 Drafting Assistant Features and Subscription Comparison

Features by Subscription

FEATURE	Drafting Assistant – Litigation	Drafting Assistant – Transactional	Drafting Assistant Essential
WestCheck	X	X	X
Insert Flags	X		X
Insert Links	X		X
Cite Formatting	X		X
Deal Proof	X	X	X
TOA Builder	X		X
Templates & Sample Documents	X		
Locate Authority	X		
Practical Law Integration	X	X	
Case Notebook Integration	X	X	
West km Integration	X	X	
Search Westlaw Integration	X		
Validate Doc Formatting	X		
Authority Compiler	X		
Concourse Integration	X	X	
Firm Central Integration	X	X	
Practical Law Standard Documents and Clauses		X	
Defined Term Discrepancies Flags		X	
Numeration Flags		X	
Punctuation Flags		X	
Non-Conforming Phrases Flags		X	
Open Issues Flags		X	
Reference to Other Documents		X	
Report Creation		X	
Export		X	

Feature Descriptions

Feature	Description
Flags and Links	Inserts KeyCite status flags and links from each citation in your document to the full-text documents on Westlaw. Formerly known as BriefTools.
Deal Proof	Analyzes and reviews document drafts to identify potential errors, omissions, and inconsistencies that may occur in the process of drafting, negotiating, and reviewing your agreement.
Cite Formatting	Identifies citations in your document, suggests the correct citation format if necessary, and allows you to apply the correct formatting directly to your legal document.
TOA Builder	Builds and inserts a properly formatted list of references (known as a Table of Authorities or TOA) in your legal document.
WestCheck	Verifies the status of citations extracted from your document (or in a citations list you create manually), verifies the accuracy of quotations in your document, and creates reports.

Servers at Thomson Reuters provide back-end processing for some product features. These processes include password authentication, citation processing, KeyCite information retrieval, and the creation and searching of document indexes. If you have West km integrated with Flags and Links, then West km servers provide back-end processing.

3 About Cite Formatting

The Cite Formatting tool checks citations in your legal document and suggests the correct citation format. Use the Cite Formatting tool to:

- Identify legal citations (cases, statutes, court rules, regulations, constitutions, administrative decisions, and journal and law review articles) in your document.
- Suggest citations from **The Bluebook: A Uniform System of Citation**, the **ALWD Citation Manual**, or a citation style specific to a state.
- Apply correct formatting directly to your document while giving you complete control over which citation changes to make.

Working with Profiles in Cite Formatting

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the Cite Formatting tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

CREATING NEW CITE FORMATTING PROFILES

1. Click the Cite Formatting tool on the left side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. Underlined Citations).
4. Select a **Jurisdiction** from the list.
5. Select the **Rules for Citation** from the list.
6. Select a set of desired **Citation Styles** from the list (Legal Briefs or Law Reviews).
7. Select the content categories you would like to include in your citations list.
8. Select the **Formatting Preferences** you wish to apply to the citations. Options include:
 - Underline appropriate citation elements.
 - Italicize appropriate citation elements.
 - Include Subsequent History.
9. Select to include **Ids**, **Ibids**, **Supras**, and **Case Title only short forms** if desired.
10. Select an option to work with **Parallel Citations**:
 - Allow West Cite Advisor to suggest which citations to include.
 - Include only one citation per authority cited. If you select this option, you can choose whether to Cite to the official reporter if possible or to Cite to West's National Reporter system if possible.
 - Include Citations to all available reporters.
11. Select an option to apply to Statutes:
 - Use the publication validated by Drafting Assistant.
 - Use the official statute publication (e.g. U.S.C.).
12. Click **Save**.
13. Utilize the new saved profile in the Cite Formatting tool by selecting it from the **Select Profile** list, then clicking **Run Cite Formatting**. For detailed information on checking citation formatting, see "Working with Cite Formatting" on page 6.

VIEWING, EDITING, AND DELETING CITE FORMATTING PROFILE SETTINGS

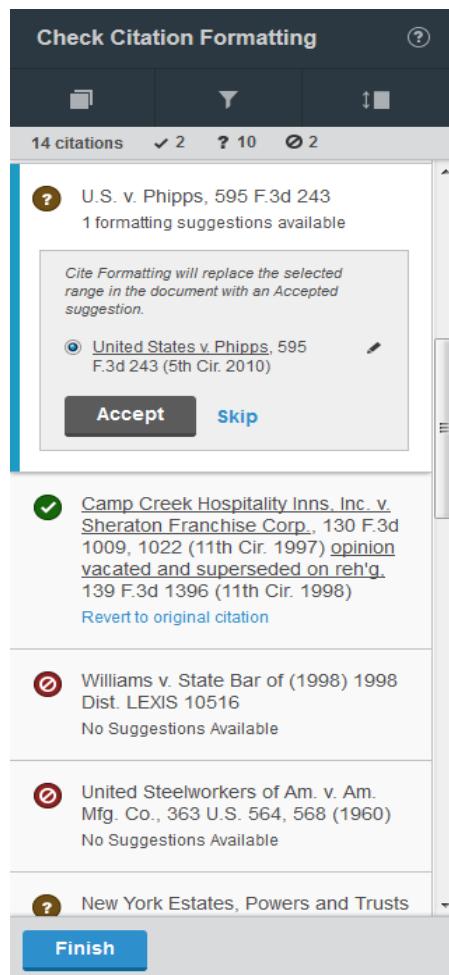
To edit the settings for a Cite Formatting profile:

1. Click the Cite Formatting tool on the left side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

Working with Cite Formatting

Check citations in your legal document, view suggestions for the correct citation format, and make formatting changes using the Cite Formatting tool.

1. Click the **Cite Formatting** tool on the left side of your document.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. For more information, see "Working with Profiles in Cite Formatting" on page 5.
3. Click **Run Cite Formatting**.
4. Each citation displays in a list in the left pane and the citations status is displayed at the top of the Cite Formatting tool. Citation formats are marked as:
 - Suggestion matches the document text or a suggestion has been accepted.
 - No suggestions are available.
 - Multiple suggestions available. Choose a suggestion and click **Accept**.
5. Optionally, click the **Group By** () button at the top of the citations list to group citations by **Citation Status** or **All instances of a Citation**. You can also click the **Group By** button and select **Restore Default View** to return to the default view.
6. Optionally, click the **Filter** button () at the top of the citations list to filter by content type, citation format, and citation type. Select the options you wish to view, then click **Apply**.
7. Optionally, click the **Collapse/Expand All Suggestions** button () to display or hide all of the suggestions for each citation.
8. Citations with formatting suggestions offer options for formatting. Select an option and click **Accept**. The status of the citation formatting displayed at the top of the Cite Formatting tool updates.



9. Optionally, you can revert to the original citation formatting after accepting a suggestion by clicking **Revert to original citation**.



[Republic of China v. Chang, 134 Cal.
App. 2d 124, 285 P.2d 351 \(1955\)](#)
[Revert to original citation](#)

10. Once you complete formatting your citations, click **Finish** to exit the tool.

4 About Deal Proof

Use the Deal Proof tool to analyze and review document drafts. You can quickly generate or review a first draft, as well as find and address potential errors, omissions, and inconsistencies that may occur in the process of drafting, negotiating, and reviewing your agreement. Deal Proof flags your document for potential errors and discrepancies, and references made in your document. After thoroughly reviewing your document, you can generate reports for flags, references, and the outline of the findings and then remove all markings and hypertext links in the documents.

Deal Proof Settings

Deal Proof allows you to customize your analysis, display, and flag settings.

1. Click the Deal Proof tool on the left side of your document.
2. On the Deal Proof tool, click the settings button (⚙) at the bottom of the viewer.

ANALYSIS SETTINGS

To select regional and formatting settings to be used during analysis, click the **Analysis Settings** tab. The default settings are based on legal terminology and formatting that are typical for the location selected during installation. You can change the settings to reflect legal terminology and formatting for the United States, United Kingdom, and Canada, as needed.

1. Select a location to use the legal language styles of that region. During analysis, Deal Proof uses terminology typical of the region to help in identifying elements in your document. For example, a lawyer in the U.S. would typically use "Defined Terms" or "Definitions" to introduce the section of a document that lays out what the parties intend certain words to mean within the document. A lawyer in the U.K. would typically use "Interpretations."
2. To identify defined terms within tables, select **Identify Defined Terms in Tables**. In the United Kingdom, it is common practice to place defined terms in tabular format, in which case you would want to select this setting. In the United States, tabular format is usually reserved for data that is not defined terms, in which case you would want to clear this setting.
3. To identify defined terms based on text treatment (bold, italic, or underlining) and enclosure within parentheses, select **Identify Bold, Italic or Underlined Defined Terms in Parentheses**. If this setting is selected, Deal Proof identifies these elements as potential defined terms.
4. Select **Prompt to incorporate Cross Referenced Documents in Defined Term analysis**, if desired.
5. Select **Enable Deal Proof Comments**, if desired.
6. Select **to Run Deal Proof analysis on original and redline version of documents**, if desired.
7. Click **Reset Defaults** to return the settings to their defaults.
8. Click **Save** to apply changes.
9. Click **Close**.

DISPLAY OPTIONS

To change the display options and modify the text color in the document to easily identify issues and references, click the **Display Options** tab. Use the **Text Color** list for each of the Flags and References and select a color. Click **Reset Defaults** to return the settings to their defaults. Click **Save** to apply changes.

DO NOT FLAG LIST

To customize reports and results by not flagging certain terms, click the **Do Not Flag List** tab. You can create a list of terms that you do not want to flag in the current document and terms you do not want to flag in all documents.

1. Type a term in the **Term (not case-sensitive)** box and click **Add**. The term displays in the **Do Not Flag (in this document)** list.
2. Use the **Move** buttons to move terms between the **Do Not Flag (in this document)** and the **Do Not Flag (in all documents)** lists.
3. Select the terms that you do not want to flag in the lists.
4. To remove a term, select the term and click **Remove Selected**.
5. Click **Reset Defaults** to remove all terms from both lists.
6. Click **Save** to apply changes.
7. Click **Close**.

SUPPRESS FLAGS

To customize reports and results by suppressing flags, click the **Suppress Flags** tab. Clear the check boxes next to the type of flags you would like to suppress. Suppressing a flag does not eliminate color mark-up of the flag, but suppresses the flag from appearing in the Results list. Click **Save** to apply changes. Click **Reset Defaults** to revert to the default and include all flags in the analysis list. Click **Close** to finish.

Any changes you make are not reflected in the current analysis. To view changes, you must re-analyze the document.

Working with Deal Proof

Locate errors and inconsistencies in your document, analyze references, and generate reports using the Deal Proof tool.

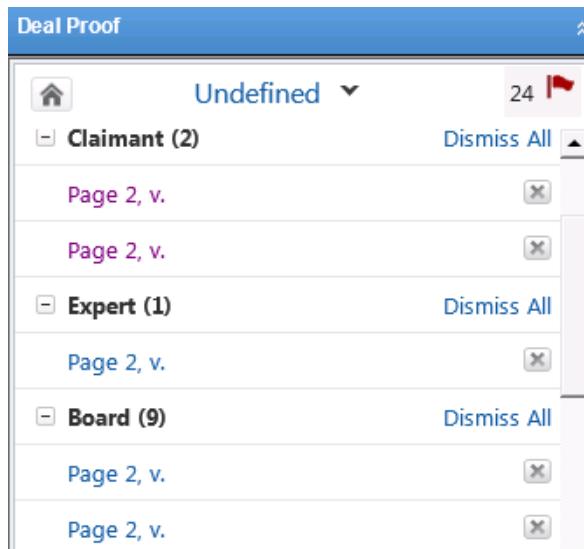
ANALYZING A DOCUMENT

These items are checked when a document is analyzed:

- Terms that appear to require definitions have been defined.
- Defined terms are located in the document and defined only once.
- Defined terms are located as stated in the document.
- Entries in the definition section are alphabetized.
- Punctuation is properly paired.
- Similar phrases and expressions are stated with consistency.
- Numeration is correct at all levels in the document.
- Open issues in the document have been addressed.

You can locate errors and inconsistencies in your document. Further, if your main document contains references to other documents, the referenced documents can be analyzed as well. For example, if your main document uses a term that is defined in a separate document, the software can verify that the term is defined in that document. When analyzing a document, no changes are made to the content of your document.

1. Click the **Deal Proof** tool on the left side of your document.
2. Click **Analyze** in the Deal Proof tool.
3. If references to other documents are detected, a list of references displays. For each referenced document you want to include in the analysis, click **Browse**, locate the file, and click **Open**.
4. When you are finished linking files to referenced documents, click **OK** to continue analysis. Your draft document and the selected referenced documents are analyzed.
5. All potential errors and inconsistencies and references display in the left pane.
6. Expand/collapse the lists of flags and references found in the document and click the Flag and Reference types (for example, Cited Sources) to go to the flag or reference link.
7. Click the flag or reference link to go to the flag or reference in the document text. Click the **X** next to the flag or reference to remove it, if desired. Click **Dismiss All** to ignore all flags or references of a specific type.



8. Click the **Home** button () to go to the full results list.

9. For more information on the types of flags and references listed, see "Understanding Flags" on page 10 and "Understanding References" on page 10.
10. Click **Create Report** to generate a report of the analysis. For more information, see "Creating Reports" on page 10.
11. Click the **Export** list and select **Open** to open the results in a separate document. Select **Email** to send the results as a Microsoft Outlook attachment.
12. Click **Analyze** to re-analyze the document.
13. Click **Clean** to remove all markings inserted in your document and close the Results pane. Cleaning a document does not remove any of the substantive changes you make to the content of the document during the analyzing process. After cleaning a document, you can forward it to others, with no evidence of analysis.

CREATING REPORTS

After analyzing a document (see "Analyzing a Document" on page 9 for more information), you can generate reports for flags, references, and an outline.

1. Click the Deal Proof tool on the left side of your document. Click **Create Report** on the Deal Proof panel in the left pane.
2. Select **By Section** or **By Type** to indicate the flag report organization.
3. Select any or all of the **Flags** and **References** you want to include in your report.
4. Select the **Outline** check box to create a report that shows an outline of key sections in your document.
5. Click **View Report** to open the report in a separate document.
6. Click **Email Report** to send the report as a Microsoft Outlook attachment, if desired. You must close Microsoft Word before emailing a report.
7. Click **Close** to finish.

To customize reports and results by suppressing certain flags, see "Deal Proof Settings" on page 8.

Understanding References

After analyzing your document, all references in the document are marked in the document and listed in the results pane. For more information on analyzing a document, see "Working with Deal Proof" on page 9. The following types of references are marked:

CITED SOURCES

Sources such as law, cases, and secondary sources that are cited in your document are marked.

CONFORMING PHRASES

For each main phrase, the instances of that phrase in your document are marked. Expressions in your document do not need to be identical to be considered conforming phrases. For example, consider the phrase *have been exercised*. The following conforming phrases would display:

- deemed to *have been exercised* and such
- deemed to have been exercised immediately
- warrants have been exercised

CROSS-REFERENCED DOCUMENTS

Names of cross-referenced documents are marked.

CROSS-REFERENCED SECTIONS

Sections of your document that cross-reference other sections in your document are marked.

DEFINED TERMS

Terms that have been defined in your document are marked.

Understanding Flags

After analyzing your document, all potential errors and inconsistencies display in the results pane. For more information on analyzing a document, see "Working with Deal Proof" on page 9.

DEFINED TERM DISCREPANCIES

These flags show potential issues and inconsistencies in defined terms, including the following:

- **Defined But Not Capitalized:** A term is defined but not capitalized.
- **Defined But Not Used:** A term is defined but not used in the document.
- **Defined More Than Once:** A term is defined more than once in the document.
- **Defined Term Location Misstated:** A term is defined in the main document but references to the term incorrectly state the location of the definition.
- **Out of Alphabetical Order:** A term in the definition section appears to be out of alphabetical order.
- **Undefined:** A term is used with initial caps in the middle of a sentence but is not defined in the document. That is, the term appears to require a definition but is not covered in the definitions section of the document.

NON-CONFORMING PHRASES

These flags help you focus on any inconsistent language in the document. Deal Proof finds the conforming phrases in the document and checks to see that similar phrases and expressions are used consistently throughout the document.

For example, suppose it is important that your document always use the expression “similar foreign, federal, state, or local statute.” In one instance, however, you use “foreign or federal” instead. Deal Proof flags the latter instance as a non-conforming phrase.

NUMERATION DISCREPANCIES

These flags help ensure that you use consistent numbering throughout your document. Deal Proof also flags numbers that are out of sequential order.

OPEN ISSUES

These flags show any blank spaces, multiple question marks, and dates or information that need to be finalized before the document is ready. Any open issues are flagged in brackets.

UNPAIRED PUNCTUATION

These flags help locate any unpaired punctuation in the document, including unpaired brackets, parentheses, and quotation marks. For example, unpaired punctuation might include using an opening parentheses or bracket but not the closing parentheses or bracket, or using an opening quotation mark but not a closing quotation mark.

Suppressing Flags

To customize reports and results by suppressing certain flags, see "Deal Proof Settings" on page 8.

5 About TOA Builder

Use the TOA Builder tool to build a properly formatted list of references (known as a Table of Authorities or TOA) in your legal document. The TOA is inserted where your cursor is positioned in the document at the time you run the tool and includes section headings for all content categories that are enabled when the profile settings are configured (see "Working with Profiles in TOA Builder" on page 12 for more information). It is considered best practice to use the TOA Builder tool in tandem with the Check Citation Formatting tool. Using both of these tools ensures that only valid citations are included in the table of authorities, and that those included are formatted correctly.

Working with Profiles in TOA Builder

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the TOA Builder tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

CREATING NEW TOA BUILDER PROFILES

1. Click the TOA Builder tool on the left side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. Combined Federal and State).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include in your citations list.
6. Select the **Formatting** preferences you wish to apply to the headings in the TOA. Options include font type, size, and style (**Bold**, *Italic*, Underline).
7. Select an option to work with **Citations in TOA**:
 - **Match font and font size from citation in the document.**
 - **Apply Special Formatting.** If you select this option, you can choose a font type and size to apply to the citations.
8. Select an **Underline and Italicize** option for the citations in the TOA:
 - **Use underlining and italics that are applied to the cites in the text of the document.**
 - **Apply Special Formatting.** If you select this option, you can choose to **Underline Title**, **Italicize Title**, or both.
9. Select one or more of the following options:
 - **Case name on separate line:** Print each case name on a separate line.
 - **Include subsequent history from text:** Include history in citations in the table of authorities.
 - **Use Passim for Frequently Cited Sources:** Use passim rather than citing specific pages.
 - **Combine Federal and State categories:** Combine federal and state citations in each table of authorities category. For example, if this option is selected, federal and state citations are listed together under Cases. If this option is not selected, cases are listed under Federal Cases and State Cases separately.
10. Select a **Tab Leader** from the list provided (a tab leader is a row of dots or lines that connect the TOA text to the page number).
11. Select a **TOA Spacing** option (Single or Double) from the list provided. This setting only applies to citations in the TOA. Headings are always double-spaced.
12. Click **Save**.
13. Utilize the new saved profile in the TOA Builder tool by selecting it from the **Select Profile** list, then clicking **Run TOA Builder**. For detailed information on inserting a TOA into your document, see "Working with TOA Builder" on page 13.

VIEWING, EDITING, AND DELETING TOA BUILDER PROFILE SETTINGS

1. Click the TOA Builder tool on the left side of your document.
2. Select the Profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

Working with TOA Builder

The Table of Authorities (TOA) Builder inserts a properly formatted list of references in your legal document.

BUILDING A TABLE OF AUTHORITIES

1. Click the TOA Builder tool on the left side of your document.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. See "Working with Profiles in TOA Builder" on page 12 for more information.
3. Click **Run TOA Builder**.
4. Optionally, click the **Hide/Show All Instances** button () to display or hide additional instances of citations.
5. To quickly locate a citation in your document, select it from the citations list in the left pane. The document view scrolls to the location of the citation and the citation is highlighted in your document.
6. Optionally, select a citation and click the Move Up () or Move Down () button or drag and drop a citation to move it up or down in the list.
7. Select individual check boxes, content category check boxes, or the **Select All** check box to select the citations you want to include in the TOA.
8. Click **Insert TOA**.
9. Click in the document to select a position in the document to insert your TOA, then click **Submit**.
10. Verify the TOA is in the correct position. Click **Change Position**, if needed. Click **Finish**.
11. A message verifying the TOA has been inserted displays. Click **X** to close.

The table of authorities is inserted in your document at the cursor location. The table of authorities includes the following headings as needed: Cases, Federal Cases, State Cases, Statutes, Federal Statutes, State Statutes, Rules, Federal Rules, State Rules, Regulations, Federal Regulations, State Regulations, and Other Authorities.

6 About Flags & Links

The Flags & Links tool allows you to view the status of cited cases, statutes, court rules, regulations, and administrative decisions in your document. Flags and links are applied to all standard long and short form citations, but you have the option to include **Ids**, **Supras**, **Ibids**, or to include case titles only in short form. Use the Flags & Links tool to link to full-text documents on Westlaw.

Working with Profiles in Flags and Links

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the Flags & Links tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

CREATING NEW FLAGS & LINKS PROFILES

1. Click the Flags & Links tool on the left side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. Secondary Source Flags).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include.
6. Select to **Include Ids, Supras, Ibids** if desired.
7. Select to **Include case titles only short form** if desired. Note that Flags & Links will be applied to all standard long and short form citations.
8. Click **Save**.
9. Utilize the new saved profile in the Flags & Links tool by selecting it from the **Select Profile** list, then clicking **Insert/Update**. For detailed information inserting Flags & Links, see "Working with Flags and Links" on page 14.

VIEWING, EDITING, AND DELETING FLAGS & LINKS PROFILE SETTINGS

To edit the settings for a Flags & Links profile:

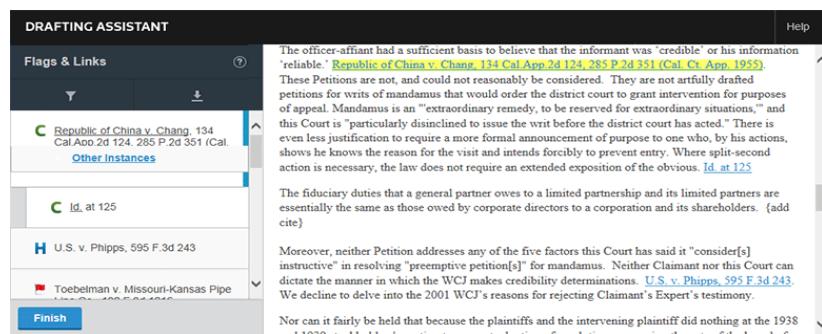
1. Click the Flags & Links tool on the left side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane.

Working with Flags and Links

Insert, update, or remove KeyCite status flags and links from the citations in your document to the full-text documents on Westlaw.

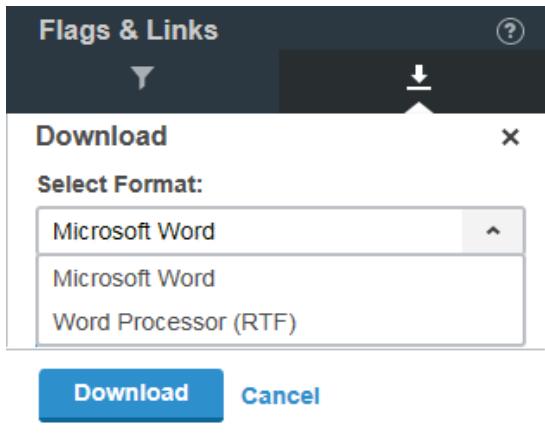
INSERTING AND UPDATING FLAGS AND LINKS

1. Click the Flags & Links tool on the left side of your document.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. For more information, see "Working with Profiles in Flags and Links" on page 14.
3. Select to insert **Links**, **Flags**, or both, then click **Insert/Update**.
4. A list of KeyCite flags that have been added appear in the left pane. To quickly locate a citation in your document, select it from the list in the left pane. The document view scrolls to the location of the citation and the citation is highlighted in your document. For more information, see "About KeyCite Status Flags" on page 19.



5. You have the following options:

- **Filter:** Filter the list of citations by flag type. Click the **Filter** button (🔍) at the top of the citations list, select the flags you wish to view, then click **Apply**.
- **Download:** Download, print, and send the citations list. Click the **Download** button (⬇️) at the top of the citations list, select a format from the list provided, then click **Download**. Once downloaded, you can open and print the downloaded citations and you can send them to others via email.



6. Click **Finish** to return to the Drafting Assistant list of available tools. A message displays indicating the number of citations that were processed. Click **X** to close the message.

REMOVING FLAGS AND LINKS

1. Click the **Flags & Links** tool on the left side of your document.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. For more information, see "Working with Profiles in Flags and Links" on page 14.
3. Select to remove **Links**, **Flags**, or both, then click **Remove**.
4. Confirm the selection of **Links**, **Flags**, or both, then click **Remove**.
5. A message displays indicating the number of links and flags removed from the document. Click **X** to close the message.

ABOUT KEYCITE STATUS FLAGS

KeyCite is a citation research service which helps you determine whether your case, statute, administrative decision, or federal regulation is good law and find cases and other sources that cite it. A red, yellow, or blue striped flag; blue H; or green C indicates that KeyCite information is available for the associated document. A KeyCite status flag lets you know immediately the status of a case, statute, regulation, rule, or administrative decision.

Red Flag

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 warns 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.

Yellow Flag

In cases and administrative decisions, a yellow flag warns that the case or administrative decision has some negative history, but has not 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; that an uncodified session law or proposed legislation affecting the statute is available (statutes merely referenced, i.e., mentioned, are not marked with a yellow flag); that a proposed rule affecting the regulation is available; that the regulation has been reinstated, corrected, or confirmed; that the statute or regulation was limited on constitutional or preemption grounds or its validity was otherwise called into doubt; or that a prior version of the statute or regulation received negative judicial treatment.

Blue Striped Flag

A blue striped flag indicates a document has been appealed to the U.S. Courts of Appeals or the U.S. Supreme Court (excluding appeals originating from agencies).

Blue H

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

Green C

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.

Unverified Red U

Citations that are unverified or that contain potential errors display with an Unverified tag next to them.

7 About WestCheck

WestCheck is an automated citation-checking tool that verifies the status of citations in your legal document or in a citations list you create manually. Use the WestCheck tool to:

- Check the status of your citations in KeyCite (see "Checking Citations" on page 18 for more information).
- Create a Cited Decisions list of cases cited by your case (see "Creating a Citations List" on page 20 for more information).
- Access QuoteRight to verify the accuracy of quotations in your documents (see "Verifying Quotations with QuoteRight" on page 21 for more information).
- Retrieve full-text versions of cited documents.

WestCheck is available via online software at drafting.westlaw.com.

Services Available in WestCheck

KEYCITE

Use Thomson Reuters KeyCite® citation checking service to instantly verify whether a case, statute, regulation, or administrative decision is good law, and to find citing references to support your legal argument. KeyCite integrates with the West Key Number System so you can track legal issues discussed in a case. In addition, KeyCite provides information such as:

- Direct appellate history of cases and administrative decisions.
- Negative citing references for cases and administrative decisions.
- Citations to cases, administrative decisions, secondary sources, briefs, and other court documents that have cited a case, statute, administrative decision, or regulation.
- Citations to session laws or rules amending or repealing a statute or regulation.
- Citations to proposed legislation affecting a federal or state statute.

KeyCite covers every case in the National Reporter System, as well as more than 1 million unpublished cases. KeyCite information is also available for federal and state statutes and regulations, administrative decisions from selected states, patents issued by the U.S. Patent and Trademark Office, American Law Reports (ALR) annotations, articles from hundreds of law reviews, and administrative decisions of selected federal agencies. In addition, KeyCite provides citing references from numerous texts and treatises.

FIND

When you know the citation of the document you want, WestCheck can retrieve the full text of the document and send it to a destination you choose. The Find service is available for many types of documents, including case law, statutes, regulations, administrative decisions, articles from publications such as law reviews and treatises, specialized materials (for example, OSHA inspection and enforcement reports), and materials published in foreign countries.

CITED DECISIONS

While KeyCite lists cases citing your case, the Cited Decisions service lists the cases cited by your case. Cited Decisions gives you an idea of whether the precedential value of the case you are citing has been eroded. Cited Decisions is also available for ALR annotations, law review articles, and selected administrative decisions.

Cited Decisions is a useful tool for finding hidden weaknesses in a case because it shows whether the cases on which your case relies have significant negative history. The Cited Decisions result allows you to determine at a glance which cited cases merit investigation.

- Cited cases are marked with KeyCite status flags, which indicate whether the cases have history or citing references available in KeyCite.
- Each cited case is marked with depth of treatment stars that indicate the extent to which the citing case discusses the cited case.
- Quotation marks indicate when a citing case directly quotes the cited case.

QUOTERIGHT

Use QuoteRight to verify the accuracy of quotations cited in your document. When WestCheck extracts citations from your document, it also creates a list of quotations found in your document. You can choose to have the QuoteRight service check these quotations against the full text of the documents.

Working with Profiles in WestCheck

If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. Each time you access the WestCheck tool, you are provided with options to select an existing profile, view/edit profile settings for a selected profile, and create a new profile.

CREATING NEW WESTCHECK PROFILES

1. Click the **WestCheck** tool on the left side of your document.
2. Click **Create New**.
3. Type a name for the new profile in the **Profile Name** box (e.g. KeyCite History).
4. Select a **Jurisdiction** from the list.
5. Select the content categories you would like to include in your citations list.
6. When the WestCheck tool extracts citations from your document, it also creates a list of quotations found in your document. When a quotation is attached to a citation, the WestCheck tool compares the quotation in the user's document against the actual quotation in the cited document. QuoteRight displays the quotation text from both the user's document and the cited document, noting if the quotation is identical or different. You can also choose to ignore quotes that contain less than two to six words. The WestCheck tool extracts the citation but QuoteRight does not attach quotations with less than the specified number of words to the citations (e.g., select 2 to indicate that QuoteRight should not process quotations of less than two words). Turn this feature off by selecting **Turn off QuoteRight**.
7. Select the services (KeyCite, Find, QuoteRight, and Cited Decisions) to use to check your citations. To set KeyCite limits, click the **Select Limits** link under the **KeyCite** option (see "Setting KeyCite Limits" on page 23 for more information).
8. Select to sort the WestCheck citation list report by **Citation or Services (KeyCite, Find, QuoteRight, Cited Decisions)**.
9. Select to **Include short form instances, unverified cites and cites for which no services have been requested** if desired.
10. Click **Save**.
11. Utilize the new saved profile in the WestCheck tool by selecting it from the **Select Profile** list, then clicking **Extract Citation List**. For detailed information on creating a citations list, see "Creating a Citations List" on page 20.

VIEWING, EDITING, AND DELETING WESTCHECK PROFILE SETTINGS

To edit the settings for a WestCheck profile:

1. Click the **WestCheck** tool on the left side of your document.
2. Select the profile you want to view or edit from the **Select Profile** list.
3. Click **Edit**. Note, the default profile can be viewed but not edited.
4. Edit the settings as desired and click **Save**. To delete the profile, click **Delete Profile** at the bottom of the left pane. Click **Continue** to confirm.

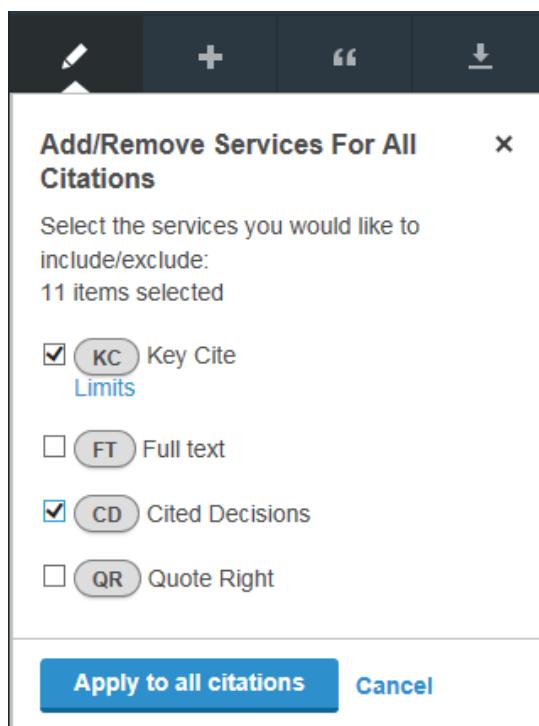
Checking Citations

You can check your citations in the WestCheck tool using the KeyCite, Find, QuoteRight, and Cited Decisions services then create an online or offline report. Note that citations that are unverified or that contain potential errors display with an unverified tag next to them. This tag remains until the citation is corrected and the new citations list is extracted or until the citation is manually added to the list.

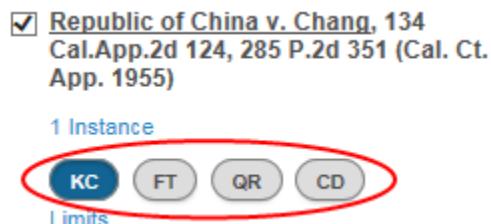
1. Click the **WestCheck** tool on the left side of your document.
2. If you are a new user, it is recommended that you define presets for common use cases using the **Profile** options. Profiles allow you to select, save, and reuse options you use frequently. See "Working with Profiles in WestCheck" on page 18 for more information.
3. Click **Extract Citation List**.

4. Select the services (KeyCite, Find, Cited Decisions, QuoteRight) to use to check your citations.

- To add/remove services for all citations, click the Add/Remove Services button (edit icon), select the services you would like to include/exclude, and click **Apply to all citations**.



- To add/remove services for individual citations, click to add/remove the services using the buttons below the citation. To set KeyCite limits, click the **Limits** link under the KC button (see "Setting KeyCite Limits" on page 23 for more information).



5. To generate a report of your citations, see "Working with Reports in WestCheck" on page 22.

ABOUT KEYCITE STATUS FLAGS

KeyCite is a citation research service which helps you determine whether your case, statute, administrative decision, or federal regulation is good law and find cases and other sources that cite it. A red, yellow, or blue striped flag; blue H; or green C indicates that KeyCite information is available for the associated document. A KeyCite status flag lets you know immediately the status of a case, statute, regulation, rule, or administrative decision.

Red Flag

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 warns 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.

Yellow Flag

In cases and administrative decisions, a yellow flag warns that the case or administrative decision has some negative history, but has not 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; that an uncodified session law or proposed legislation affecting the statute is available (statutes merely referenced, i.e., mentioned, are not marked with a yellow flag); that a proposed rule affecting the regulation is available; that the regulation has been reinstated,

corrected, or confirmed; that the statute or regulation was limited on constitutional or preemption grounds or its validity was otherwise called into doubt; or that a prior version of the statute or regulation received negative judicial treatment.

Blue Striped Flag

A blue striped flag indicates a document has been appealed to the U.S. Courts of Appeals or the U.S. Supreme Court (excluding appeals originating from agencies).

Blue H

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

Green C

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.

Red U

Citations that are unverified or that contain potential errors display with an Unverified tag next to them.

ABOUT DEPTH OF TREATMENT CATEGORIES

Examined

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

Discussed

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

Cited

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

Mentioned

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

Creating a Citations List

Extract the citations from your document and create a citations list by clicking the **WestCheck** tool on the left side of your document, then clicking **Extract Citation List**.

ADDING CITATIONS TO THE CITATIONS LIST

Once you have extracted a citation list, you can manually add citations to that list.

1. Click the **Add Citation** button () at the top of the citations list.
2. In the **Citation** box, type the citation.
3. In the **Title** box, type a title for the citation.
4. Click **Add**.

LOCATING A CITATION IN YOUR DOCUMENT

Locating a Citation

To quickly locate a citation in your document, select it from the citations list in the left pane. The document view scrolls to the location of the citation and the citation is highlighted in your document.

Locating Inaccurate Citations

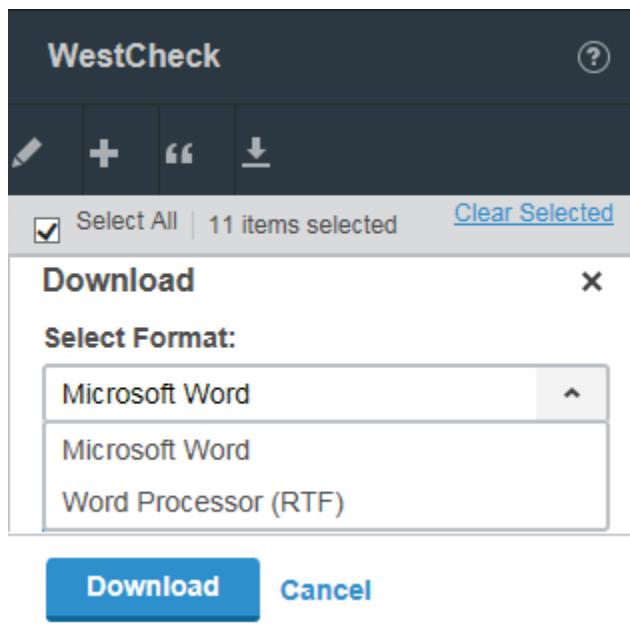
Citations that are unverified or that contain potential errors display with an unverified tag next to them ( **Unverified**). This mark remains until the citation is corrected and the **WestCheck** tool is run again or until the citation is manually added to the list.

Citations that are not available with your subscription display with a red symbol displayed next to them.

DOWNLOADING, PRINTING, AND SENDING CITATIONS

Download, print, and send the entire citations list or individual citations in the list.

1. Click the check box next to the citations you want to download. If you want to download all of the citations, click the **Select All** check box.
2. Click the **Download** button (⬇) at the top of the citations list.
3. Select a format from the list, then click **Download**.



Once downloaded, you can open and print the downloaded citations and you can send them to others via email.

Verifying Quotations with QuoteRight

Use QuoteRight to verify the accuracy of quotations cited in your document. When the WestCheck tool extracts citations from your document, it also creates a list of quotations found in your document.

If a citation is linked to a quotation, the number of available quotations for the citation is listed after the citation in your citations list. WestCheck also creates a list of quotations found in your document. You can view the extracted quotations for the entire list or you can view the extracted quotations by individual citations.

When a quotation is attached to a citation, WestCheck compares the quotation in the user's document against the actual quotation. QuoteRight displays the quotation text from both the user's document and the cited document, noting if the quotation is identical or different.

VIEWING QUOTATIONS BY INDIVIDUAL CITATION:

You must enable the QuoteRight service in the WestCheck profile that you use when extracting your citation list. When QuoteRight is enabled and citations are extracted, an **Attach Quotes** (📎) button displays at the top of the WestCheck citations list. For more information, see "Working with Profiles in WestCheck" on page 18.

1. Click the **Attach Quotes** (📎) button located at the top of the WestCheck citations list.
2. Select a quote from the list of quotes.
3. Detach a quotation from a citation by dragging the quotation to the **Unattached Quotes** area at the bottom of the quotes list.
4. Attach a quotation from **Unattached Quotes** at the bottom of the quotes list by dragging it to the citation you want to attach it to.
5. Optionally, select a quotation and click the **Move Up** (⬆) or **Move Down** (⬇) button to move it up or down in the list.

To quickly locate a quotation in your document, select it from the quotes list in the left pane. The document view will scroll to the location of the quote and the quote will be highlighted in your document.

UNDERSTANDING UNVERIFIED QUOTATIONS

A quotation is considered unverified if the quotation in your document could not be found in the cited document. If you have an unverified quotation (or quotations) in your QuoteRight result, QuoteRight will deliver results according to the table below.

Unverified Quotation Result	QuoteRight Action
Single unverified quotation attached to a unique citation.	Delivers the full text of the document.
One unverified quotation among multiple quotations attached to a unique citation.	Delivers the full text of the document for the unverified quotation.
Two or more unverified quotations among multiple quotations attached to a unique citation.	Delivers the full text of the document for the first unverified quotation. All other unverified quotations will not have the full document delivered.
Single unverified quotation attached to a nonunique case law citation.	Does not deliver the full text of the case. You will be instructed to narrow the citation to a particular case.
One or more unverified quotations among multiple quotations attached to a nonunique case law citation.	Does not print the full text of the case. For unverified quotations, you will be instructed to narrow the citation to a particular case.
Single unverified quotation attached to a nonunique, non-case law citation.	Attempts to deliver the document. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified citation is delivered instead of the full text of the document.
One unverified quotation among multiple quotations attached to a nonunique, non-case law citation.	Attempts to delivered the document for the unverified quotation. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified nonunique citation is delivered instead of the full text of the document.
Two or more unverified quotations among multiple quotations attached to a nonunique, non-case law citation.	Attempts to deliver the document for the first unverified quotation. Because it is a nonunique, non-case law citation, a list of the non-case law documents for the specified citation is delivered instead of the full text of the document. All other unverified quotations will not have the document delivered.

Working with Reports in WestCheck

- Once you have checked your citations in WestCheck (see "Checking Citations" on page 18 for more information), click [Create Report](#).
- Select the Report Settings:
 - Delivery Options:**
 - The **Email** option provides boxes for To, Subject, Email Note, and a Format list that allows you to choose to deliver the report in Word, PDF, or RTF format. You can deliver the report to multiple email addresses.
 - The **Download** option allows you to choose to download the report in Word, PDF, or RTF format.
 - The **Online Report Display** option allows you to view the report in your browser and includes links to the full-text documents on Westlaw, links to the KeyCite history and citing references, and a navigational index.
 - Result Options:**
 - Select **Deliver Find results separately from the report** and select Word, PDF, or RTF format to deliver all Find requests in a separate document in that format. If you select this option, you may also want to select **Create one file for all Find Results** to deliver the Find requests separately and as one single document (instead of multiple documents).
 - Select **Substitute with Reporter Images when available** to deliver PDF images of case law documents exactly as they appear in the National Reporter System. If you select this option, you may also want to select **Create one PDF for all Reporter Images** to deliver the results as a single PDF (instead of multiple PDFs).
 - Select **Dual Column Layout for Cases** to format the results in two columns per page. This option is not available for the Online Report Display.

- Report Options:
 - Select KeyCite Flags in Find Results for Cases to display KeyCite flags and information in the Find Results (see below for example).

Find Document

Roe v. Wade, 410 U.S. 113, 93 S. Ct. 705, 35 L. Ed. 2d 147 (1973)



KeyCite Yellow Flag - Negative Treatment

Disagreement Recognized by [Women's Medical Center of N.W. Houston v. Archer, S.D.Tex., December 29, 1999](#)

93 S.Ct. 705

Supreme Court of the United States

3. Click Generate Report.

ABOUT WESTCHECK REPORTS

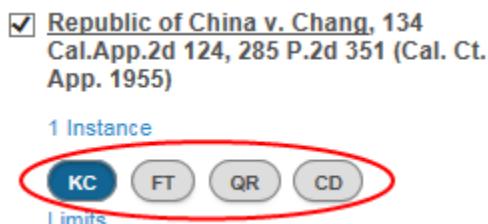
Reports generated using the WestCheck tool consist of a header, summary report, table of citations with services requested for each, detailed services reports, and a billing summary. Reports include linked KeyCite status flags (see "About KeyCite Status Flags" on page 19 for more information) and depth-of-treatment indicators (see "About Depth of Treatment Categories" on page 20 for more information) for cited documents so that you know at a glance whether your authority is good law.

The online report includes the KeyCite status flags, links to the full-text documents on Westlaw, links to the KeyCite history and citing references, and a navigational index.

Setting KeyCite Limits

Use KeyCite Limits in the WestCheck tool to restrict your KeyCite results for cases and statutes. Limiting your results is helpful if you are interested only in specific categories of KeyCite information.

You can set KeyCite Limits to apply to all citations by setting and saving the Limits in WestCheck profiles (see "Working with Profiles in WestCheck" on page 18 for more information). You can also set KeyCite Limits for individual citations using the **Limits** link under the **KC** button once you extract a citation list (see "Creating a Citations List" on page 20 for more information).



KEYCITE LIMITS

Cases:

- Select **Include Citing References** to retrieve citing references for cases. If you select this option, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the case.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types**, **Depth of Treatment** (see "About Depth of Treatment Categories" on page 20), **Jurisdictions**, **Reported Status**, and **Date Range**.
- Select **Include History References** to retrieve KeyCite history for cases. If you select this option, you may also want to select **Limit History to Negative Treatment** to retrieve only the negative treatment history for the case. If you select to limit the history, you can further select to **Exclude Filings** to retrieve negative history for the case but not include citations for related court documents.

Statutes:

- Select **Include Citing References** to retrieve citing references for statutes.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types**, **Depth of Treatment** (see "About Depth of Treatment Categories" on page 20), **Jurisdictions**, **Reported Status**, and **Date Range**.
- Select **Include History References** to retrieve statutory history, including proposed legislation, credits, and statutory and historical notes. If you select this option, you may also want to select **Limit to Validity References** to retrieve history for the statute but limit it to validity references.

Analytical & Law Reviews:

- Select **Include Citing References** to retrieve citing references for analytical and law reviews.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types**, **Depth of Treatment** (see "About Depth of Treatment Categories" on page 20), **Jurisdictions**, **Reported Status**, and **Date Range**.

Patents:

- Select **Include Citing References** to retrieve citing references for patents. If you select this option, you may also want to select **Limit Citing References to Negative Treatment** to retrieve only negative treatment citing references for the patent.
 - Click **Narrow by Content Type and Other Filters** to further restrict citing references from displaying. Clicking this link provides options to filter citing references by **Content Types**, **Depth of Treatment** (see "About Depth of Treatment Categories" on page 20), **Jurisdictions**, **Reported Status**, and **Date Range**.
- Select **Include History References** to retrieve KeyCite history for patents. If you select this option, you may also want to select **Limit History to Negative Treatment** to retrieve only the negative treatment history for the patents. If you select to limit the history, you can further select to **Exclude Filings** to retrieve negative history for the patents but not include citations for related court documents.

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