Automating Citations in Legal Writing - Zotero?

A major chore in legal writing is citations, especially in briefs and journal articles. We are all familiar with the Blue Book and the variations required in different courts and by individual judges.

How much have you relied on automating the process of inserting citations in the right format into your documents? What kind of experience, if any, have you had with programs like Zotero? http://www.zotero.org/

A professor at Victoria University of Wellington has published for free download a short manual on using Zotero for legal citations, tailored to New Zealand practice. http://papers.ssrn.com/sol3/papers.cfm?abstract_id=2033476

How much sense would it make to develop a plug-in (and perhaps accompanying creative commons manual) for Zotero for legal citations in U.S. format? http://citationstylist.org/ http://blog.law.cornell.edu/voxpop/2011/10/02/csl-metadata-and-legal-information-that-just-works/

I'm trying to get a sense of what would be the demand for such a tailoring of Zotero, or any similar software, and accompanying manual.

Regards,

Yee Wah Chin, New York

I'd never heard of Zotero, but just browsed the site.

There are already three Blue Book citation style definitions (one in-line, two for law review style formats) available for download on the Zotero site. I'll have to look at this more closely, because I have actually toyed with the idea of developing a VBA add-in to manage citation snippets in a brief.

One of the reasons I want to upgrade my Amicus to Pro is the use of the SQL database for the application (currently the SFE runs on a CTree database, even though the CompuLaw rules are in a SQL database). I wanted to see how the "bookshelf" feature is implemented in the database.

I already use a SQL database for various miscellaneous reference table applications, so it seemed a natural (for geeky me) progression.

-Rick

Richard J. Rutledge, Jr., North Carolina

I used Endnote to write my thesis; Bluebook is one of the hundreds of citation styles available. It automatically formats citations and then creates footnotes, endnotes, and bibliographies. Its web interface will grab information, offer a choice of sources, and then provides a grid for additional information; and with Endnote, you can change the formatting of the entire document with a click. My favorite feature was that it knew when to add 'ibid.' and 'op cit.'

There is also a freeware/shareware called CiteGenie.

Pamela the Paralegal
Pamela J. Starr

As a former editor of a law journal and someone who has written academic articles for publication, I can say that there is no way to properly cite using the Bluebook rules except for doing it yourself.

Tools like Zotero and Endnote (and some others) can give you the basic cite, but you always have to tweak it. Some are better than others. I use these tools to get the basic cite down and then go back through cite by cite, line by line, to make sure they're properly cited. Or, I did back when I had time to write more.

However, if you're citing for court purposes, most of these solutions are more than adequate.

After all, even the Bluebook states that "[t]he central function of a legal citation is to allow the reader to efficiently locate the cited source." It further states that the end goal of any citation is "to provide sufficient information to allow the reader to find the cited material quickly and easily." The Bluebook: A Uniform System of Citation 2 (Columbia Law Rev Ass'n et al ads., 18th ed. 2005).

Back in law school I tried to argue with my legal writing professor that as long as someone could find it then the cite was adequate. She told me that she should be considered my senior partner and that adequate was not enough.

Ah, legal writing hazing . . .

Sincerely,
John William Nelson, Georgia

There was definitely a lot of tweaking to do with Endnote, but once I learned the system it made it significantly easier to insert, track, and move my footnotes and citations. Yes, I kept my copy of my Bluebook handy ... fingers crossed that I properly cited everything.

There is also a nifty import/export function that integrates with Google Scholar and several journal/academic sites that will automatically extract the citation information and add it to your Endnote library.

Pamela the Paralegal (yes, 'technically', I'm graduating from law school ... it's a Masters degree and I'm still not a lawyer)

Lexis has a product that will go through your brief and correct your legal citations for you. It will also automatically generate your table of authorities. I used it for the first time recently on a complicated brief and it worked pretty well.

William L. Pfeifer, Jr., Alabama

In starting my firm I just signed up for a Lexis package that includes this product -- "Lexis for Microsoft Office" -- it finds cites, supposedly formats them and does a number of other useful things. I am usually very skeptical of office add-ins -- often they don't add much more functionality than office itself--but I was very impressed with the demo I got from Lexis. Glad to see that it seems to work in the real world. Downside is that there is a monthly fee for this, but it's not much.

Matthew B. Kaplan

Thank you, all, for sharing your experiences and observations. I have some followup --

It seems like there are already available for sale several packages (Lexis, Endnote) that will handle legal citations fairly well, and that Zotero may simply offer an open source alternative. It also sounds like they all still need some tweaking before the final product is ready to go.

One question would be, how does the free compared with the paid?

Rick, I welcome your further thoughts as you look into this more deeply. I'm particularly intrigued by your statement that

There are already three Blue Book citation style definitions (one in-line, two for law review style formats) available for download on the Zotero site. I'm probably looking in the wrong place, but I couldnt find anysuch plugins on Zoteros plug in page. http://www.zotero.org/support/plugins In fact, I had heard indirectly that Bluebook has withheld consent for creation of a Blue Book style for Multilingual Zotero and that Wisconsin Court style is being used as an approximation.

Pamela, congratulations on your graduation!

Regards,

YWC

Yee Wah Chin

Look here: http://www.zotero.org/styles

Do a "find" on the page for "blue".

-Rick

Richard J. Rutledge, Jr.

Thanks, Rick. Indeed, I now find 4 entries for "Bluebook", 3 of them from last month.

Those who have tried any of these products, how do this all compare with the other products (Endnotes, Lexis etc.) that are geared towards the same uses? Thanks.

Regards,
YWC