

# **WestlawNext®**

Getting Started Guide

# **Customer Service**

## WestlawNext Technical and Search Assistance (available 24 hours a day)

If you have general or technical questions about WestlawNext, call Customer Technical Support at 1-800-WESTLAW (1-800-937-8529) or send an email message to West.WLNextTech@ThomsonReuters.com.

If you have search questions about WestlawNext, call the Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889) or email West.WestlawNextResearch@ThomsonReuters.com.

#### **Billing and Account Assistance**

For billing and account assistance, call Customer Service at 1-800-328-4880 or email West.WestlawNextCustServ@ThomsonReuters.com. Billing and account assistance is also available online at <u>legalsolutions.thomsonreuters.com/support</u>.

## **Accessibility Support**

For information on Thomson Reuters accessibility, policy, go to legalsolutions.thomsonreuters.com/accessibility.

#### **Reference Materials**

For free reference materials, go to <u>legalsolutions.thomsonreuters.com/quides</u>. WestlawNext also contains online Help.

Information in this guide is current through August 2013.

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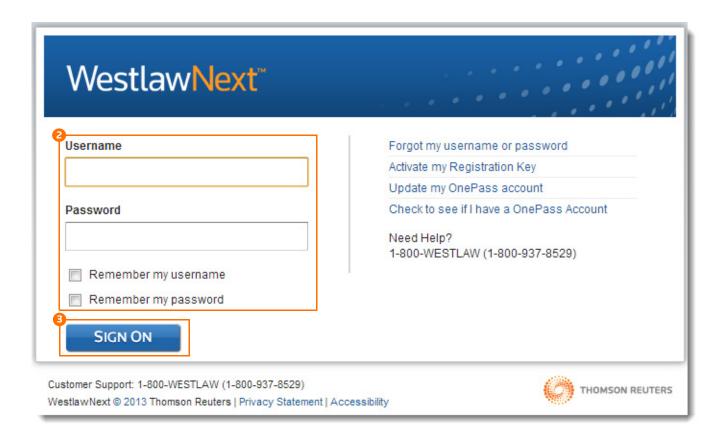
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# Signing On to WestlawNext

Complete these steps to access WestlawNext:

- Go to <u>www.Next.Westlaw.com</u>.
- Type your username and password in the **OnePass Username** and **OnePass Password** boxes.
  - Select the Remember my username check box if you want your username automatically entered each time you sign on to WestlawNext.
  - Select the Remember my password check box if you want your password automatically entered each time you sign on to WestlawNext.
- Click Sign On. The Welcome page is displayed (see page 2).

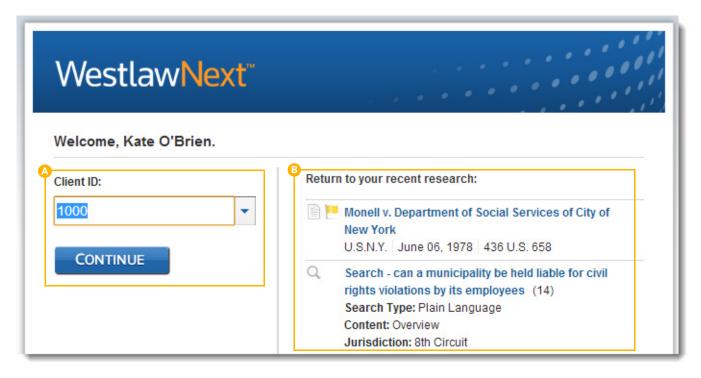


## **Select Client ID**

After you sign on, create or assign a Client ID for your research session.

- A Type a client identifier in the Client ID text box or click a client identifier in the list, then click Continue.
- Click a link under Return to Your Recent Research to return to a previous session.

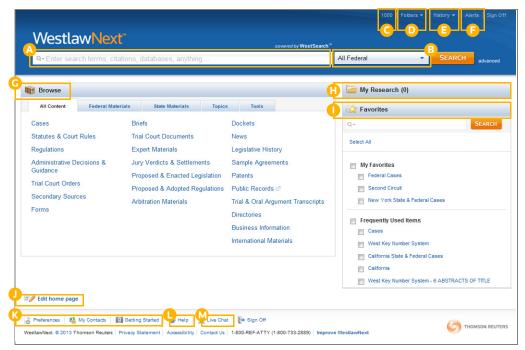
The WestlawNext home page is displayed (see page 3).



# WestlawNext Home Page Overview

Whenever you start a WestlawNext research session, you start your research from the WestlawNext home page. At the home page, you can retrieve a document by citation or a case by party name or search for documents using the search box at the top of the page. (For more information, see "Perform All Research Tasks from the Global Search Box" on page 4). You can also browse content using the links in the Browse section. (For more information, see "Browsing Content: Cases" on page 9 and "Browsing Content: Statutes" on page 10.)

- **Search Box** 
  - Type your issue in simple descriptive words or Terms and Connectors. Or type a citation. WestSearch recognizes your search format.
- Jurisdiction Selector Choose up to 3 jurisdictions before running a search.
- Client ID Allows you to track the time you spend on research projects.
- **Folders** Access recently used folders from a list or click the link to view and organize all of your folders.
- History Access recent documents and searches from the list or click the link to access your research history for up to a year.
- **Alerts** Stay up-to-date on news, legal developments, and the status of your cases.
- **Browse** Navigate to content from thousands of databases before searching.



**Project Folder** 

Add documents and snippets of text to your project folder from almost any page.

Favorites

Add content pages to your Favorites for easy access from the home page.

- **Edit Home Page** Choose to show or hide select home page features.
- Preferences, My Contacts, Getting Started
  - Set preferences for searching, delivery, citations, and more.
  - Create groups with Mv Contacts.
  - · Watch the Getting Started video.
- Help

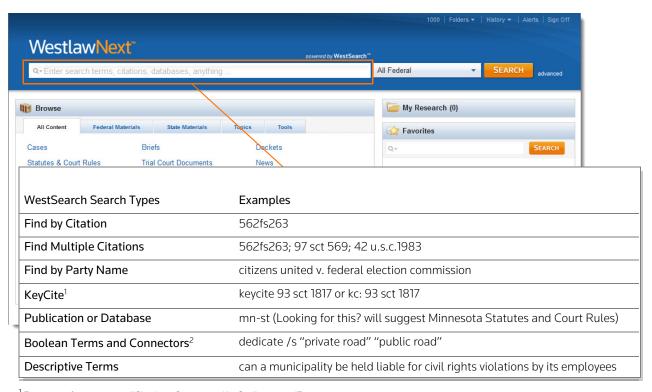
Access video tutorials and documentation in the Help Center.

Live Chat Get live research help.

## Perform All Research Tasks from the Global Search Box

Use the search box at the top of every page to run different types of searches from a single location. For example, to retrieve documents by citation, type the citation, e.g., 127 sct 2162, in the search box and click Search. To retrieve multiple documents by citation, type the citations, separated by semicolons, in the search box and click **Search**.

To retrieve a case by party name, type one or more parties' names, e.g., citizens united v. federal election commission, in the search box, change the jurisdiction if necessary, and click **Search**.



<sup>&</sup>lt;sup>1</sup> For more information, see "Checking Citations in KeyCite" on page 17.

TIP You can run all these types of searches in the search box.

<sup>&</sup>lt;sup>2</sup> For more information, see "Searching Using Boolean Terms and Connectors" on page 7.

# Researching a Legal Issue

When you run a search, you search all of the core legal content on WestlawNext by default. Core content comprises cases, statutes and court rules; regulations; administrative decisions and guidance; trial court orders; secondary sources; forms; briefs; trial court documents; expert materials; jury verdicts and settlements; proposed and enacted legislation; proposed and adopted regulations; and arbitration materials. You can search by simply typing descriptive terms that describe your legal issue or by using Boolean Terms and Connectors. (For further information, see "Searching Using Boolean Terms and Connectors" on page 7.)

# Searching Using WestSearch, the WestlawNext Search Engine

WestSearch, a search engine designed for law, helps you deliver the best results quickly. Simply type the legal issue you are researching into the search box at the top of the page.

#### WestSearch

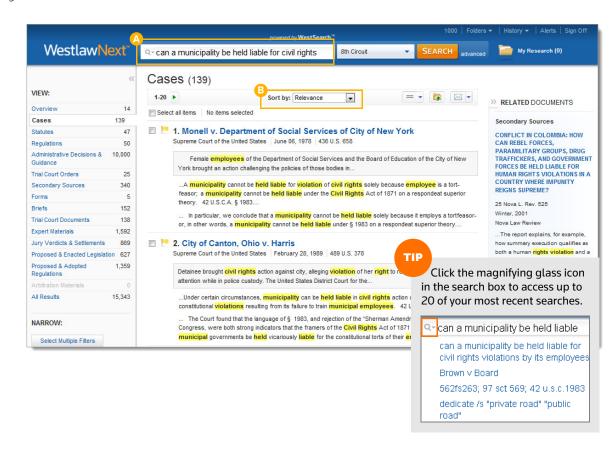
A search engine designed for law, WestSearch incorporates 125 years of proprietary analysis of the law, and tools like key numbers, KeyCite, headnotes, notes of decisions, and exclusive secondary sources, to deliver relevant documents that use phrasing differently from your query.

#### **Sorting the Result List**

By default, results are ranked by relevance and include on-point documents even if they do not reference the specific terms used in your search.

You can also sort your result list by

- date
- · most cited
- · most used



## **West Key Number System**

The West Key Number System is the most comprehensive and widely-used indexing system for case law materials. The West Key Number System is a proprietary component of the WestSearch legal search engine, which sets WestlawNext apart. Our attorneyeditors create headnotes, which are classified to topics and key numbers from the West Key Number System. If you have a relevant topic or key number, or you know what legal terms and concepts courts have used when discussing your issue, you can conduct a comprehensive search in the West Key Number System for published opinions discussing points of law touching on your issue.

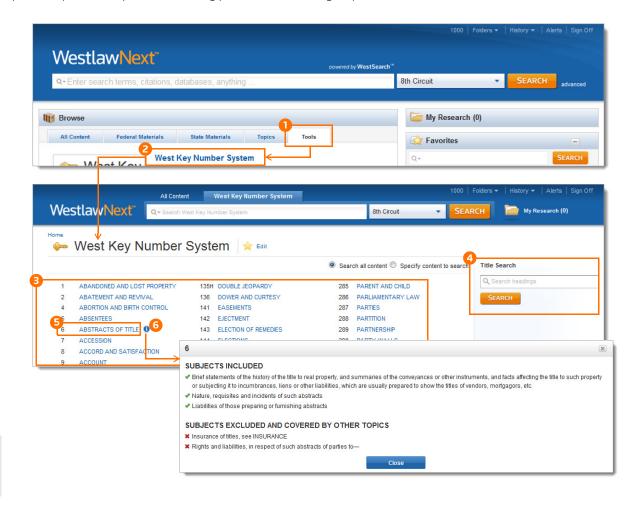
#### **Access the West Key Number System**

- In the Browse section, click the **Tools** tab.
- At the Tools page, click West Key Number System.

#### **West Key Number System Page**

- Browse for relevant topics and key numbers.
- Use the search box on the right to search headings.
- Click a topic to view its details. Then click a topic heading to view results relevant to your selected jurisdiction.
- Click the **Information** icon **1** to see a description of included subjects.

Document headnotes also provide easy access to key number-specific results, relevant to the document's jurisdiction.



# **Searching Using Boolean Terms and Connectors**

WestlawNext allows you to search using Boolean Terms and Connectors. When you search using Boolean Terms and Connectors, you enter a query consisting of key terms from your issue and connectors specifying the relationship between those terms. For example, you can require that your terms appear in the same sentence or the same paragraph.

#### **Automatic Detection**

Whenever you type a guery that contains a field restriction, proximity connector, or expander (+, %, !), WestlawNext automatically processes your search as a Boolean Terms and Connectors query.

#### **Some Connectors and Expanders**

(For a complete list, see page 8.)

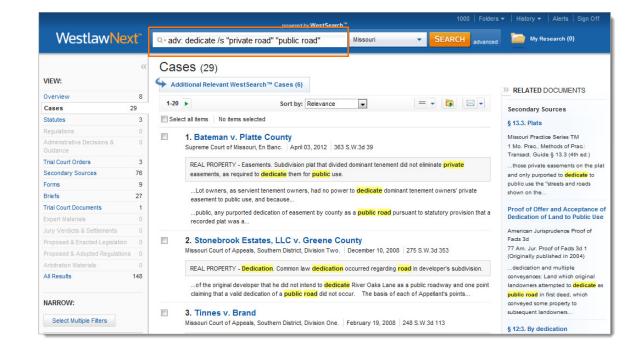
/s in same sentence

/p in same paragraph

/n within *n* terms of

#### **Examples:**

- hazard! /s waste /s dispos!
- burden +s proof prov!
- past /p consideration
- wrongful! /5 terminat!



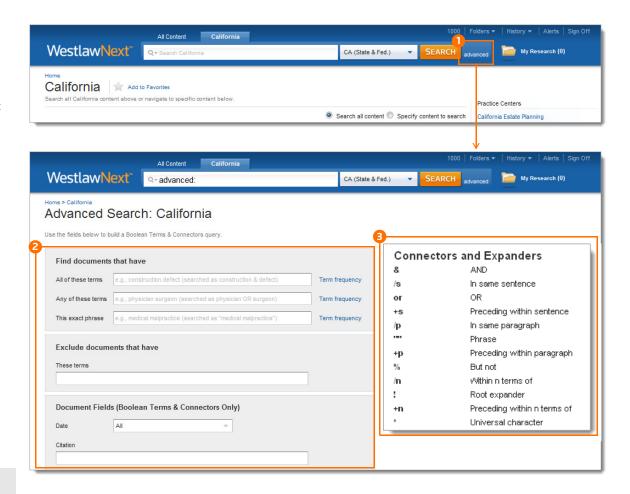


- · For the best results, use the jurisdiction selector or browse to the content you want to search before entering your query.
- When used without other connectors or fields, quotation marks, ampersands (&), and spaces (OR) are considered part of a descriptive terms search. Use Advanced Search if you want to search only for a specific phrase or use the AND or OR connectors without other connectors, expanders, or document fields. (For more information, see "Advanced Search" on page 8.)

### **Advanced Search**

Advanced search templates help you quickly build precise gueries, making it easy to search for specific content within a jurisdiction or specific information within document fields.

- **Accessing Advanced Search** Click advanced next to the Search button to display the Advanced Search page.
- Content-Specific Fields The fields available in a template are specific to the content or document type you are viewing when you click advanced.
- **Boolean Connectors and Expanders** Use to create your Terms and Connectors query.



TIP



Return to the home page by clicking the WestlawNext logo at the top of any page.

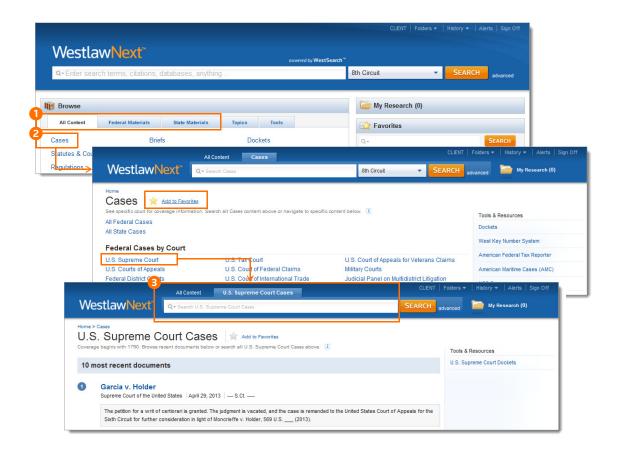
# **Browsing Content: Cases**

There are several ways you can retrieve cases in WestlawNext. Start from the Browse section, click the All Content tab, then click Cases to display the Cases page.

When you click a link for a specific court, such as U.S. Supreme Court, a list of the 10 most recent cases from that court is displayed. A corresponding tabbed search box is displayed at the top of the page. You can search all cases from the court by typing a search in the search box and clicking Search.

- Browse by:
  - Content Type
  - Federal Materials
  - State Materials
- **Navigate Further** Browse until you reach the content you would like to search.
- **Search Box** Type your search terms at the top of the page.

TIP Click the **star** icon ( $\stackrel{\checkmark}{\sim}$ ) next to content to add the pages to your Favorites for quick access from the home page.



# **Browsing Content: Statutes**

WestlawNext provides several ways to retrieve statutes. Starting from the Browse section:

- Click the All Content tab, then click Statutes and Court Rules to display the Statutes and Court Rules page. Click United States Code Annotated (USCA) to display the table of contents for the *United States Code Annotated* (USCA), or click a state name to display the table of contents for that state's statutes and court rules.
- Click the Federal Materials tab, then click United States Code Annotated (USCA) to display the USCA table of contents.
- Click the State Materials tab to view a list of states. Click a state name, then click the link to that state's statutes under Statutes and Court Rules. The table of contents is displayed.

To browse a table of contents, click the links. To run a search, type your search in the corresponding tabbed search box at the top of the page and click Search. While viewing the text of a statute section, you can click the arrows next to the section symbol ( s > ) on the document toolbar to view the next and previous sections. To return to the table of contents, click Table of Contents on the document toolbar.

#### **Table of Contents**

Click a link for statutes and court rules to display a table of contents.

**Select Content** Search all content from a page or specify content to search.

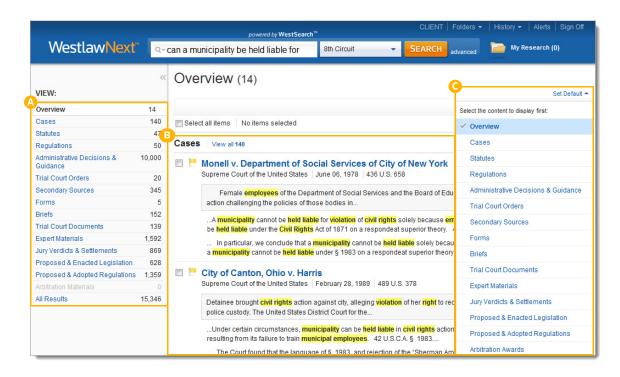


# **Search Result**

# **Overview Page**

After running a descriptive terms or Boolean Terms and Connectors search, the search result Overview page is displayed, which lists the documents most relevant to your legal issue organized by content types.

- Choose a Content Type Click a content category in the left column to display the result page for that content.
- **Relevant Results by Content Type** The top results from each content type are included in the Overview.
- **Setting the Default Landing Page** You can set the default landing page for all of your searches. Click **Set Default** and click a content type in the list.



# **Content Type: Cases**

From the Overview page, if you click Cases you will see that WestlawNext provides tools to help you further refine your search.

**Return to Home Page** 

Return to the home page by clicking the WestlawNext logo.

Search Box

Type a new search at the top of any page.

**Project Folder** 

Save or access your documents at any time.

Content List

Navigate to other content types.

Sort By

Relevance, Date (reverse chronological), Most Cited, Most Used

View Detail

Choose the level of detail you want to display for each result.

Save Documents to a Folder

Keep documents for later use.

Email, print, or download the document. You can also send it to an Amazon Kindle.

- **Related Documents** 
  - Secondary Sources
  - Briefs
  - Pleadings, Motions, and Memoranda

KeyCite Flag

Alerts you to when a point of law in a document has been negatively discussed (P) or is no longer good law (P).

**Document Title** 

Quickly scan the document title, court, date, and citation.

Research Icons

Indicate previous document activity:

Note Added

Previously Viewed in the last 30 days

Saved to Folder

**Editorial Summary** 

Case specific summaries provided by our attorney-editors.

**Search Terms in Context** 

Your search terms are highlighted in yellow.

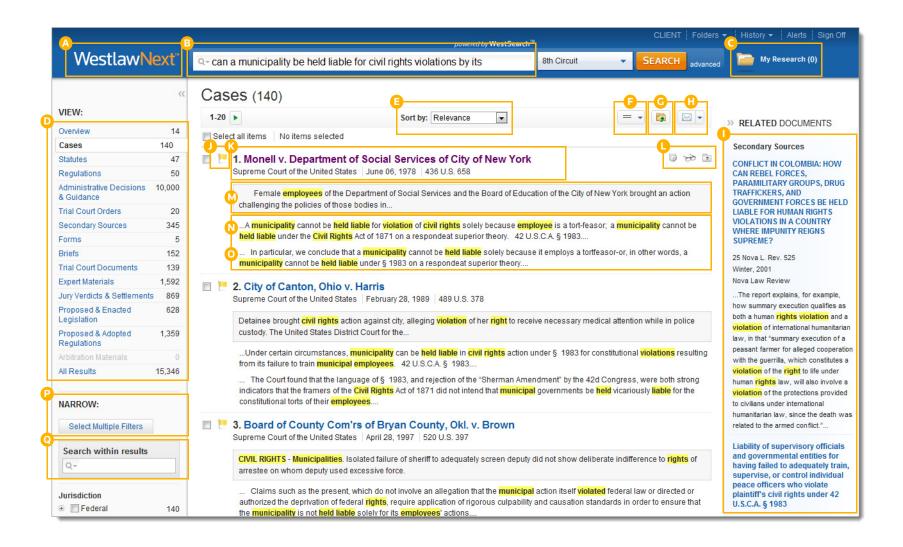
Snippets

Clicking a document snippet in a result list takes you directly to that section in the document.

- **Narrow with Filters** 
  - Date
  - Reported/Unreported
  - Jurisdiction
  - · and more.....

**Search within Results** 

Enter Boolean Terms and Connectors to search within your result list. See page 8 for a list of connectors and expanders.



# **Document Page**

## **Overview**

Once you view a case or any other document, you will find many features to help you with your research.

#### **Document Title**

Quickly scan the title, court, date, and citations.

## Tabs Powered by KeyCite

Access additional content related to the document.

#### Cases

- Filings
- Negative Treatment
- History
- Citing References

#### Statutes

- Notes of Decision
- History
- Citing References
- Context and Analysis

#### Return to List

Click this button to get back to your search result.

#### **Previous and Next**

Move through documents in your search result.

## **Browse by Search Term**

View the portions of each document that contain your search terms.

#### Go to

Jump to specific sections of the document.

- West Headnotes
- Attorneys and Law Firms
- Opinion
- Parallel Citations
- Page #

#### Create KeyCite Alert Entry

Create a KeyCite Alert entry for this document.

#### **Search Document Text**

Search text in this document.

#### **Display Options**

Adjust the document font styles, sizes, and margins.

#### **Add Document Note**

Add a note to the top of the document or hide notes you added previously.

#### Save to Folder

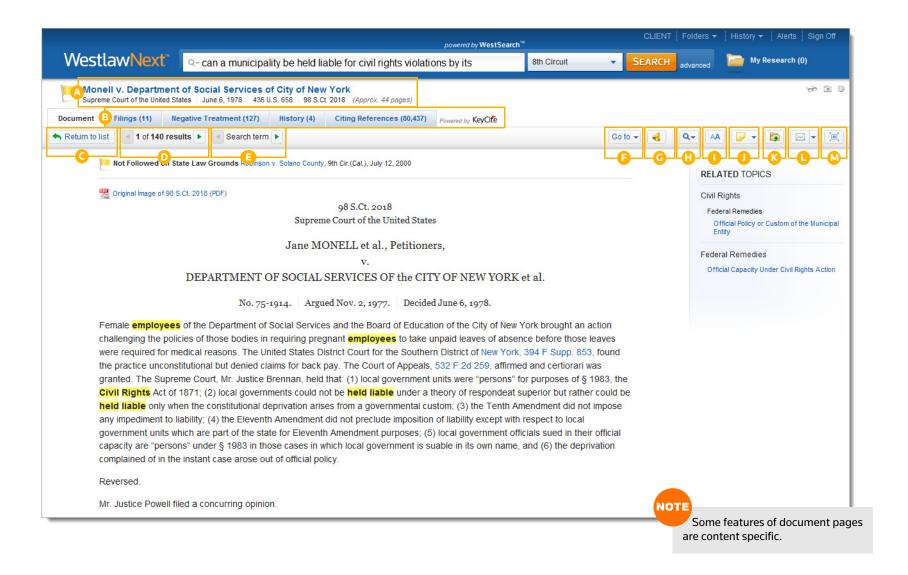
Save the document to a folder.

#### Deliver

Email, print, or download the document. You can also send it to an Amazon Kindle

#### Full Screen Mode

Expands the document view for easier reading.



#### **Workflow Tools**

The workflow tools found on all document pages are designed to make continuing your research easier. If you do not have the time to complete your research in one session, the workflow tools will help you pick up right where you left off. Research icons indicate whether you have already seen or saved this document. Related topics suggest additional areas to investigate. Plus you can highlight text and add notes to the document.

#### Research Icons

Indicate previous document activity:



Note Added

## **Related Topics**

Continue your research by exploring topics related to the document you are viewing.

#### Selected Text Menu

When you select text in a document, WestlawNext provides the following features:

#### · Save to

Allows you to save selected text to your project folder as a snippet. Clicking the snippet within the folder will return you to that place in the document.

#### Add a Note

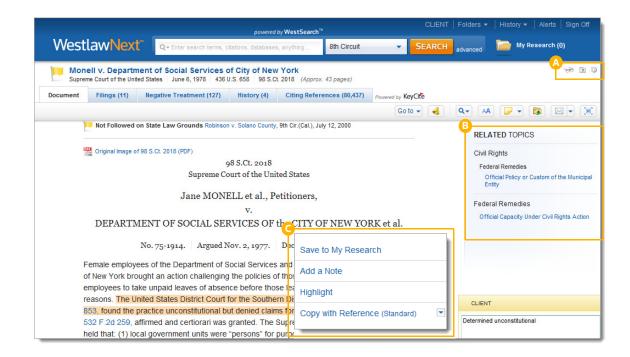
Allows you to add a note anywhere in the document.

#### Highlight

Allows you to highlight text for later reference.

#### · Copy with Reference

Allows you to insert the correct citation and page number when you paste the copied text into another document.



When you use the Copy with Reference feature, you can choose from several citation formats, including Standard and ALWD.

# **Checking Citations in KeyCite**

Use KeyCite, our accurate, up-to-the-minute citation service, to verify whether a case, statute, administrative decision, or regulation is good law and to retrieve citing references that support your legal argument.

#### **KeyCite Status Flags** Checking Cases in KeyCite

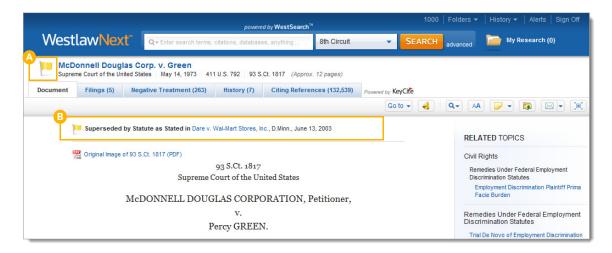
- A red flag warns that the case is no longer good law for at least one of the points of law it contains.
- A yellow flag warns that the case has some negative history but has not been reversed or overruled.

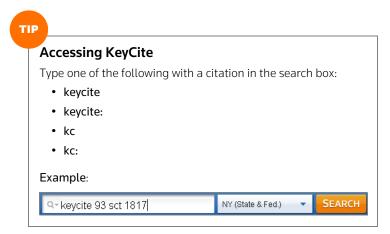
#### Checking Statutes in KeyCite

- A red flag indicates that the statute has been amended by a recent session law, repealed, superseded, or held unconstitutional or preempted in whole or in part.
- A yellow flag indicates 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; that the statute was limited on constitutional or preemption grounds or its validity was otherwise called into doubt; or that a prior version of the statute received negative treatment from a court.

## **Negative Treatment**

When applicable, a description and a link for the most negative treatment is available at the top of the document.





# **Viewing Citing References to a Case**

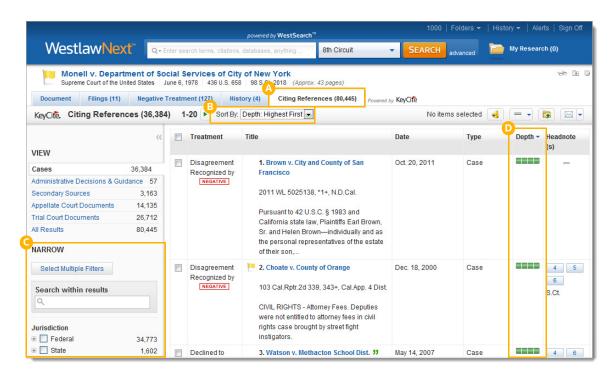
KeyCite provides a list of cases, administrative materials, secondary sources, briefs, and other court documents that cite your case and ensures you are citing good law.

- **Access Citing References** To view documents that cite your case, click the Citing References tab.
- Sort To change the order in which the citing references are displayed, click an option in the **Sort By** list on the toolbar.
- To narrow the list of citing references, you can • type terms in the **Search within results** box

Filter

Topics.

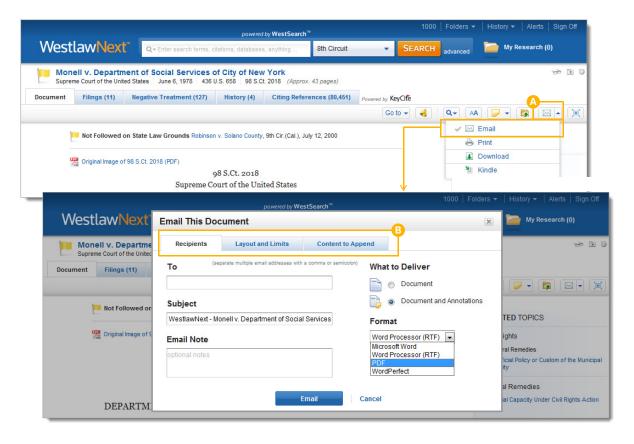
- in the left column. • click a document type in the left column, e.g., Cases. You can further narrow this list by selecting a filter under Narrow in the left column, such as Jurisdiction or Headnote
- **KeyCite Depth of Treatment Bars** KeyCite depth of treatment bars indicate the extent to which a citing case, administrative decision, or brief discusses the cited case.



	Examined	The citing case, administrative decision, or brief contains an extended discussion of the cited case, usually more than a printed page of text.
	Discussed	The citing case, administrative decision, or brief contains a substantial discussion of the cited case, 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, usually less than a paragraph.
-	Mentioned	The citing case, administrative decision, or brief contains a brief reference to the cited case, usually in a string citation.

# **Document Delivery**

If you decide that you need a copy of a document, WestlawNext offers multiple options for document delivery. Documents, snippets, and result lists can be emailed, printed, or downloaded from nearly every page in WestlawNext. Documents can also be sent directly to your Amazon Kindle, exported to Case Notebook, or saved to a project folder. (For more information, see "Project Folder" on page 20.)



**Delivery Icon** 

The last delivery method you used is displayed. The default method is email.

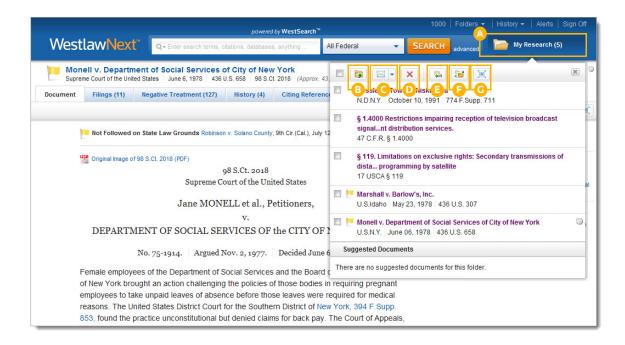
**Delivery Options** 

Deliver full text documents, with or without notes and highlighting, or lists from a result page. Click a tab to modify the format of your delivered document. Options vary based on the documents you want to deliver and the delivery method you select.

TIP To set a default delivery format and other delivery options, click **Preferences** at the bottom of any page, then click the **Delivery** tab. (For further information, see "Preferences" on page 24.)

# **Project Folder**

Saving your documents to a project folder helps you organize your research and makes it easy to return to prior research.



**Project Folder** 

You can access your project folder from any page.

Copy, Move

Move or copy documents and snippets from your project folder to other folders.

Deliver

Email, print, download, or send documents and snippets to your Amazon Kindle directly from the project folder.

Delete

Delete documents and snippets from your project folder.

Rename

Change the name of your project folder at any time.

**Change Folder** 

Quickly change your project folder to another folder.

Expand

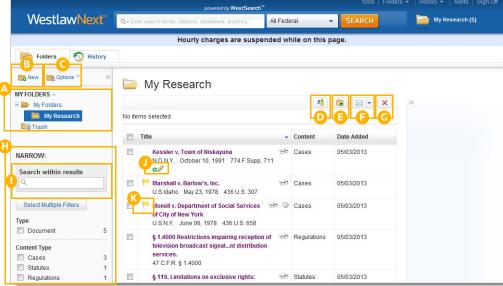
View the full contents of your project folder within the Folders page.

TIP When starting your research, create a new project folder. Place documents and snippets in the folder as you go. When finished, select the items you want, then email, print, or download them all at once. You can also export the entire folder to your computer.

#### **Folder Overview**

Documents that you add to your folders are saved on WestlawNext for as long as you choose. Click Folders at the top of any page to display the Folders page.

- My Folders Create, manage, and navigate your folders.
- New You can create as many folders as you need.
- **Options** Copy, move, rename, delete, export, send to Amazon Kindle, and share your folders.
- **Share Folder** Share entire folders with others at your organization.
- Copy or Move Copy or move contents of the folder.
- Deliver Email, print, download, or send to Kindle.



- Delete Deleting items moves them to the Trash. Items are not completely deleted until you empty the Trash.
- Narrow Sort and filter your folders to find what you are looking for quickly and easily.
- **Search within Results** Search for documents and snippets within your folders.
- Add a Description Point to a document in your folder, then click the pencil icon to add a description to the document.
- **Current KeyCite** Information

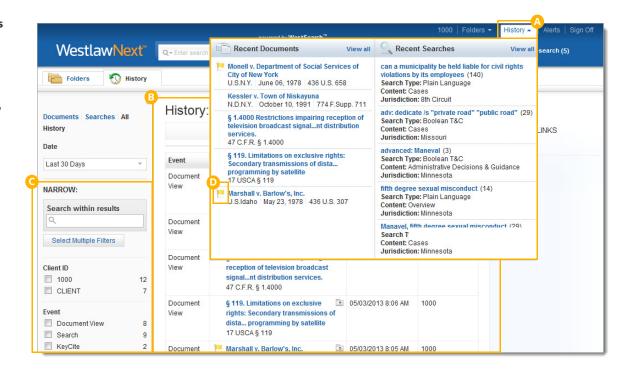
Documents that you save to folders are automatically updated by WestlawNext and, therefore, always reflect current law.

TIP You can access a document or snippet of text in a folder at no charge for an entire year after the first time it is viewed in the folder.

# **History**

Return to previous research quickly and easily with History. Your research history on WestlawNext is automatically saved for one year, including all document views and searches.

- **Recent Documents and Recent Searches** Access your most recently viewed documents and your most recent searches by pointing to History.
- Complete History Click **History** at the top of any page to view your complete history from the past 12 months.
- Search within Results Search within your history or use filters to find specific documents.
- **Current KeyCite Information** Documents in History are automatically updated by WestlawNext and, therefore, always reflect current law.

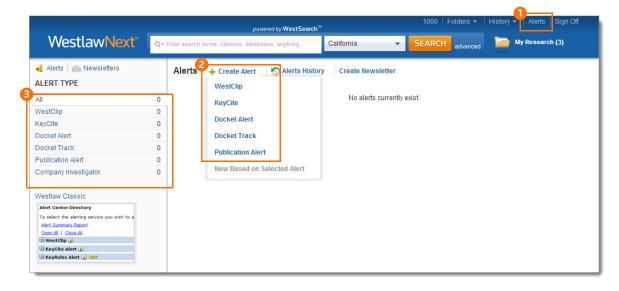


Clicking **History** is the quickest way to pick up where you left off during your previous WestlawNext session.

# **Alerts**

Alerts help you keep current on recent developments. For example,

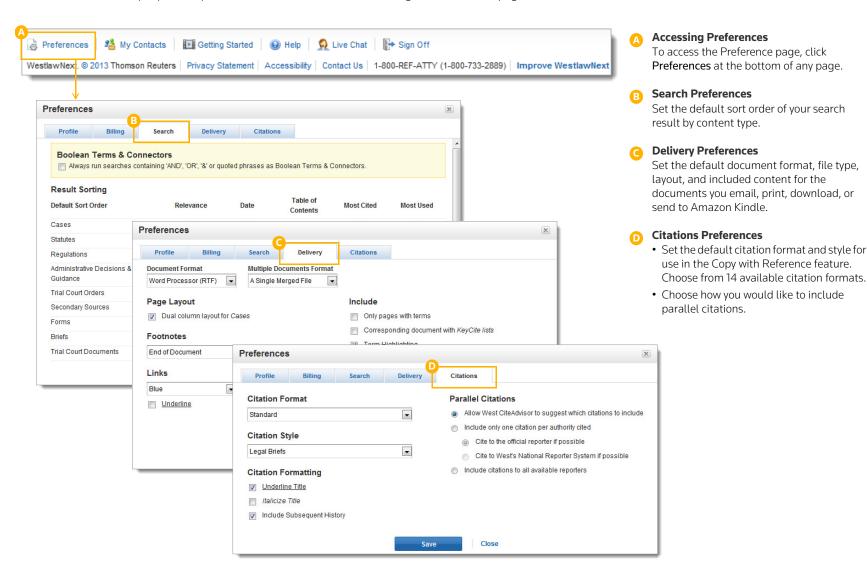
- a KeyCite alert automatically monitors the status of cases, statutes, and administrative materials and sends you updates when their KeyCite information changes.
- WestClip runs your searches on a regular basis so you can stay up-to-date on news and legal developments.
- **Accessing the Alerts Page** Click **Alerts** at the top of any page to display the Alerts page.
- Creating an Alert Click **Create Alert**, then click the type of alert you want to create on the menu.
- **Viewing Your Alerts** Click an alert type to view your alerts.



For assistance creating alerts, you can contact the reference attorneys at 1-800-850-9378 or West.WestlawNextResearch @ThomsonReuters.com.

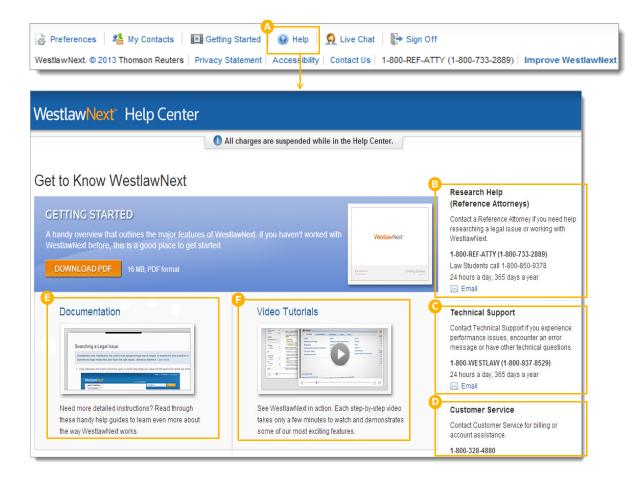
# **Preferences**

You can customize many aspects of your WestlawNext research session using the Preferences page.



# Help and Technical Support

If you have questions about using WestlawNext, or experience any technical issues, please contact us for help.



- Accessing Help Click Help at the bottom of any WestlawNext page to display the Help Center page.
- **Reference Attorneys** You can call a reference attorney at 1-800-REF-ATTY (1-800-733-2889) or email West.WestlawNextResearch @ThomsonReuters.com.
- **Technical Support** Call 1-800-937-8529 or email West.WestlawNextCustServ @ThomsonReuters.com.
- **Customer Service** Call 1-800-320-4000 or email West.WestlawNextCustServ @ThomsonReuters.com.
- Documentation View and print user guides.
- **Video Tutorials** Watch short video demos and tutorials.

# **Use a Current Browser to Optimize Your Research Experience**

To get the fastest, most reliable performance with WestlawNext, make sure your computer meets the system requirements and that you are using an updated browser.

# **System Requirements**

#### All Users

- Adobe Acrobat Reader 9.0 and Adobe Flash 10.0 or later installed
- 1024 x 768 screen resolution (or higher) recommended
- JavaScript and cookies enabled

#### Windows Users

- Microsoft Windows XP, Vista, or Windows 7 running:
  - Internet Explorer 8 or later recommended (Internet Explorer 7 supported with limited functionality)
  - Firefox current version or Extended Support Release version
  - Google Chrome current version

#### Mac Users

- OS 10.5 or later running:
  - Safari 5.0 or later
  - Firefox current version or Extended Support Release version
  - Google Chrome current version

Note WestlawNext may not be compatible with all browsers. To benefit from all features and functionality, please use one of the browsers listed above.

# Using the WestlawNext iPad App

WestlawNext is available as an iPad app and is free for existing WestlawNext users. The app allows you to perform a wide range of tasks, including finding, viewing, and emailing documents, and organizing your research into folders. You can also use the offline capability of the app to view and save documents. The app is automatically synchronized with the WestlawNext website and WestlawNext Mobile, so research started on one device can easily be accessed and continued on another. Simply download the WestlawNext app from the Apple iTunes store.



