Using Westlaw Doc & Form Builder

Westlaw Doc & Form Builder makes it easy to retrieve, create, and save documents and forms for your clients. To sign on to Westlaw Doc & Form Builder, go to **http://forms.westlaw.com**.

Searching for Documents

At the home page (Figure 1), you can use the text box at the top of the page to search for forms or to retrieve a form by citation or name. You can also browse content using the links in the *Browse* section, or access favorite or frequently used items by clicking the links in the right column.

USING THE SEARCH TEXT BOX

To use the Search text box to search for documents, follow these steps:

1. Type terms describing your issue, or a Terms and Connectors search, in the text box at the top of any page. You can also choose a recent search by clicking the *Recent Searches* icon ( ) in the text box.
2. Leave the default jurisdiction or click the arrow to display the Jurisdiction selector. Select up to three jurisdictions and click **Save**.
3. Click **Search**.

BROWSING FOR DOCUMENTS BY JURISDICTION OR TOPIC

In addition to searching using the text box, you can use the Browse feature to retrieve forms. Simply click the category links on the *Jurisdiction* or *Topics* tab in the *Browse* section. Click a topic heading to display its subtopics.

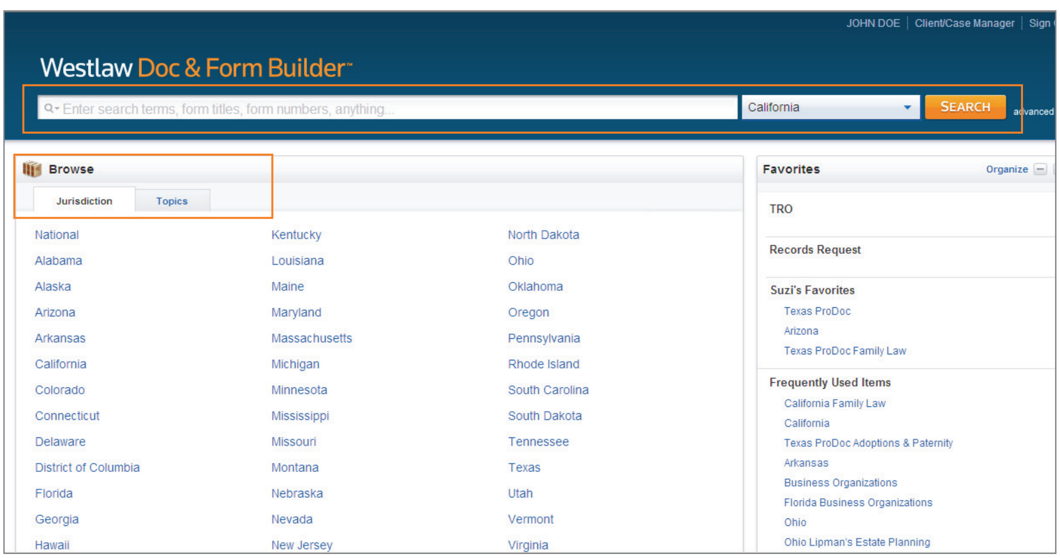

Figure 1. Westlaw Doc & Form Builder home page

For assistance using Westlaw, call **1-800-WESTLAW (1-800-937-8529)**.

For free reference materials, visit **west.thomson.com/westlaw/guides**.

Viewing the Results page

After your search is run, an overview of the search result is displayed (Figure 2). Documents are displayed in groups of 20. To move to the next group of 20, click the arrows at the top or bottom of the result list. By default, documents are ranked by relevance. To change the default ranking, choose an option from the *Sort by* drop-down list at the top of the center column.

FILTERING SEARCH RESULTS

You can narrow a search result by selecting a filter under *Narrow* in the left column. For example, the filters can include jurisdiction, document type, or source. To apply a filter, select one or more check boxes and **Apply Filters**. To undo all filters you have added, click **Undo Filters** under *Narrow*.

SEARCHING WITHIN RESULTS

To narrow a search result by searching within the result, type your terms in the *Search within results* text box under *Narrow* in the left column and click **Search**. Both your original search terms and the terms used to narrow your result are highlighted in the documents. To undo a search within a result, click **Undo search within** in the left column.

FORM FINDER RESULTS

When you run a search using the text box at the top of the page, the Results page includes a link to Form Finder Results in the left column. Click **Form Finder Results** to view additional forms available through Form Finder on WestlawNext.

Note: These forms may not be included in your subscription.

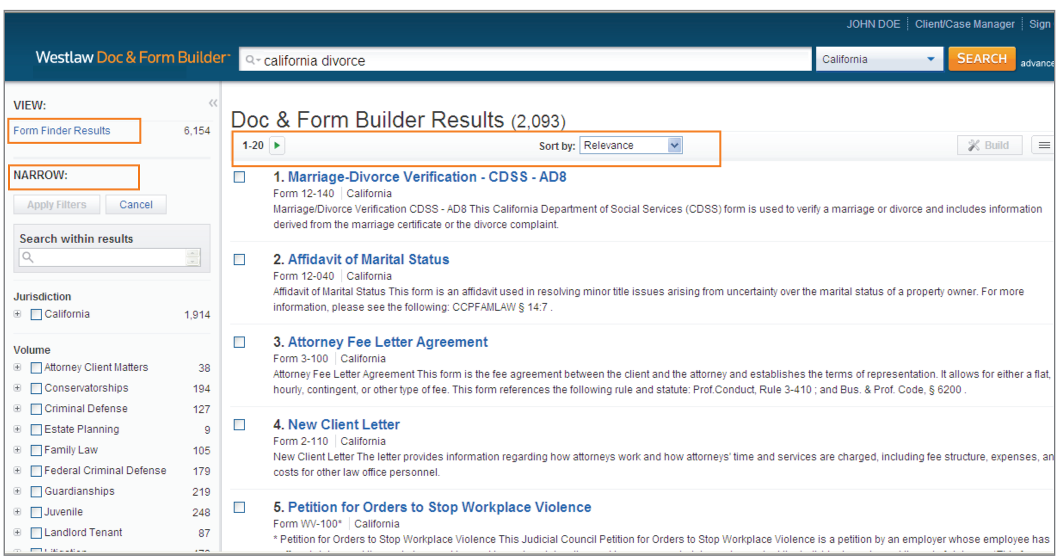

Figure 2. Results page

Previewing a Document

To preview a document, click its title in the Results page. The form is displayed with blank fields for review, or as a scanned image of a blank document.

At the top of the document, you may see a paragraph containing explanatory text. This paragraph explains when the form may be used, includes links to relevant primary and secondary resources on WestlawNext, and provides other useful information about the form. Only part of the explanatory text may be displayed. Click **More** to display all the explanatory text in a pop-up box (Figure 4). Click **Close** to close the box.

To build a document, click **Build** at the upper-right corner of the document.

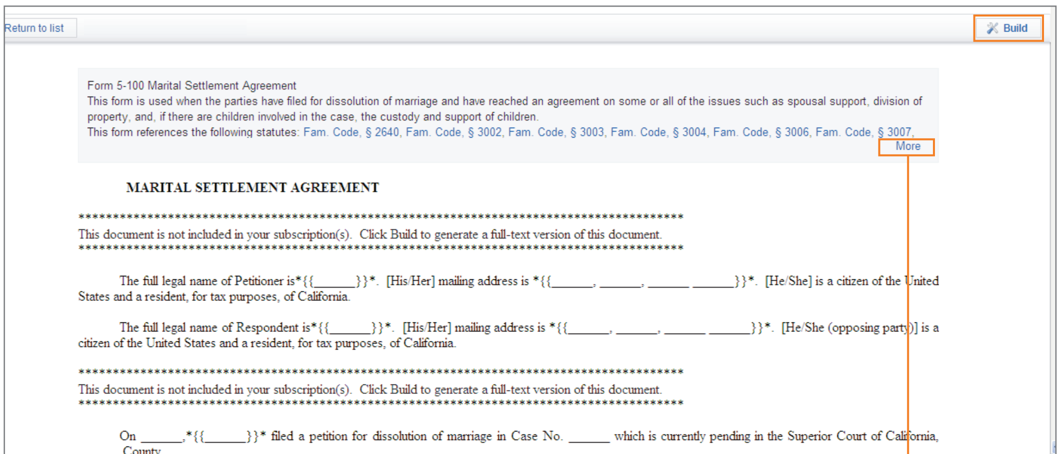

Figure 3. Previewing a text document

Figure 4. Explanatory text and related links for displayed document

Building a Document

BUILDING A PDF DOCUMENT

When you preview a PDF form, the form is displayed as a scanned image of a blank form (Figure 5). When you click **Build**, the fillable PDF is displayed (Figure 6). If there is more than one page, navigation arrows are displayed at the upper-left of the document. To complete and download the form, follow these steps:

1. Complete the text and check boxes in the displayed fillable PDF. To advance to the next blank filed, press **Tab** on your keyboard. To go back to the previous blank field, press **Shift+Tab**.
2. Click **Download** in the upper-right corner of the form.
3. Click **Download** in the dialog box that is displayed.
4. To save the form without viewing it, click **Save**. In the alternative, open the form and view it before saving by clicking **Open**. Then click **File** and then **Save a Copy** in the upper-left corner to display the Save a Copy dialog box
5. Name the file, decide where you want to save it, and click **Save**.

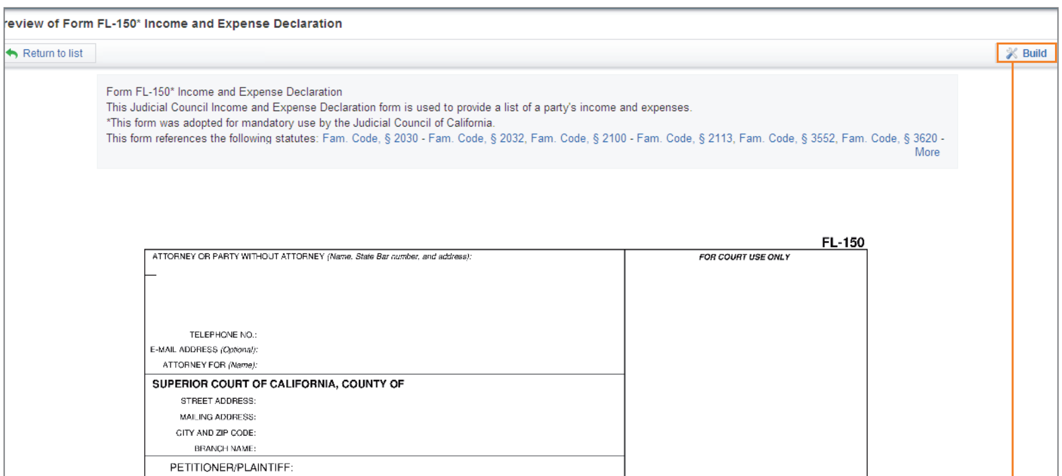

Figure 5. Previewing a PDF form

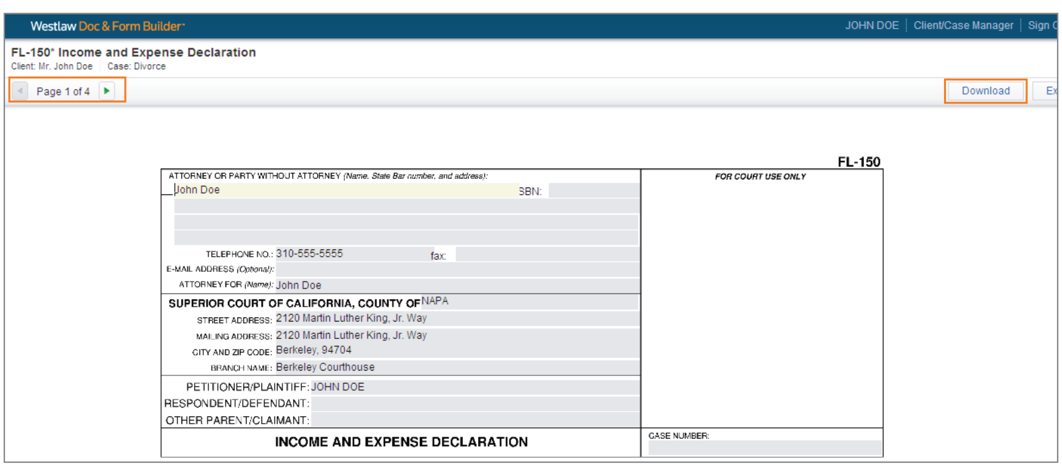

Figure 6. Fillable PDF form

BUILDING A TEXT DOCUMENT

When you preview a full text form, the form is displayed as text with blanks where information should be entered (see Figure 3 on page 3 of this guide). To compete the form, click **Build** in the upper-right corner. To complete the form, use the text boxes, drop-down lists, and plus signs (**+**) to enter the required information. Click the question mark next to a question for more information about that question (Figure 7).

Saving a partially complete document

To save a document (it does not need to be complete), click **Save & Exit** at the top of the left column.

Accessing a saved document

To access a document you saved, follow these steps:

1. Click **Client/Case Manager** at the upper-right corner of any page.
2. Click the name of the client to display the cases associated with that client.
3. Click the name of the case associated with the document you want to access. Documents are displayed in the right column.
4. Select the check box for the form you want to access and click **Build** in upper-right corner. Click **Continue** in the dialog box that is displayed (or select a different client or case for which to build the form). The document is displayed at the beginning, regardless of where you stopped in the build process.

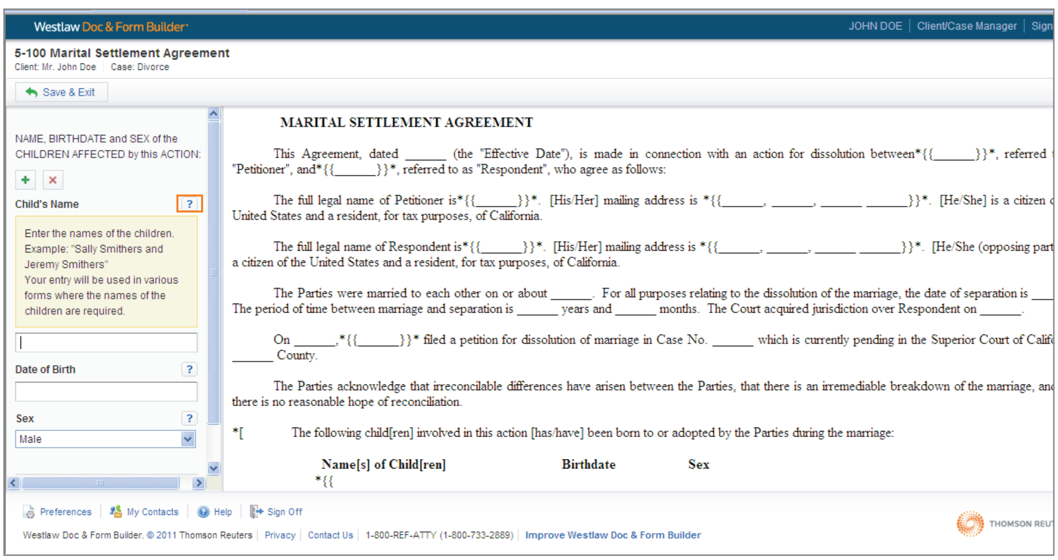

Figure 7. Building a text document

Using the Client/Case Manager

The Client/Case Manager (Figure 8) helps you to organize clients and cases, share your work with others in your firm, and view documents in progress or completed documents. To access the Client/Case Manager, click **Client/Case Manager** at the upper-right corner of any page.

Creating, Editing, Sharing, Closing, and Deleting Clients or Cases

CREATING A NEW CLIENT OR CASE

You can create a client or case in three ways.

From the Client/Case Manager

To create a new client or case using the Client/Case Manager, access the Case/Client Manager and click **New** at the top of the left column. Complete the text boxes. To save the client or case, click **Save**. To save the client and immediately add a case for that client, click **Save & Add Case**.

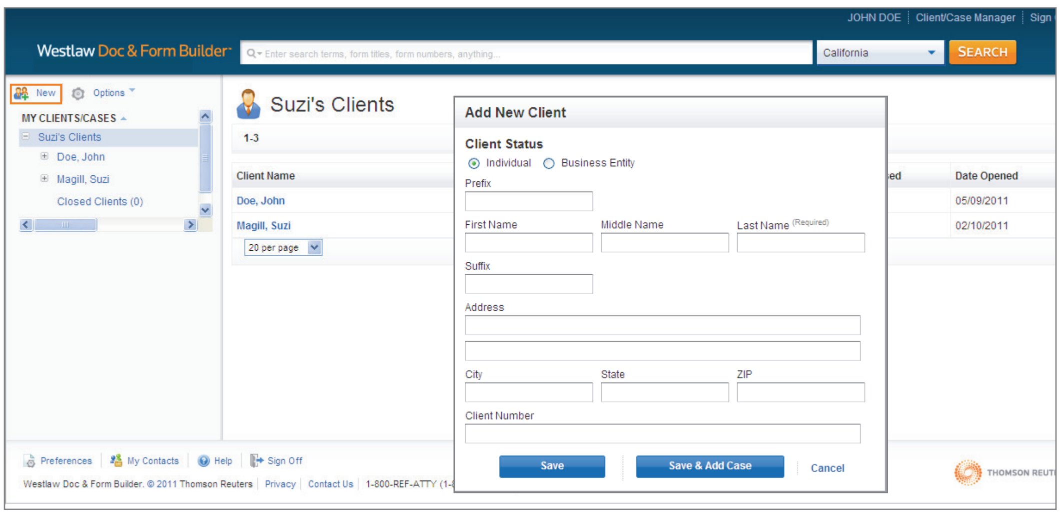

Figure 8. Creating a new client using the Client/Case Manager

From a Result List or a Document

To create a new client or case from a result list or a document, follow these steps:

1. In a result list, select the check box of the form you want to build, then click **Build** at the upper-right of the list (Figure 9). From a document you are previewing, click **Build** in the upper-right corner of the document.
2. In the dialog box that is displayed, click **New Client** or **New Case**.
3. Complete the text boxes.
4. To save the client or case, click **Save**. To save a client and immediately add a case for that client, click **Save & Add Case**.

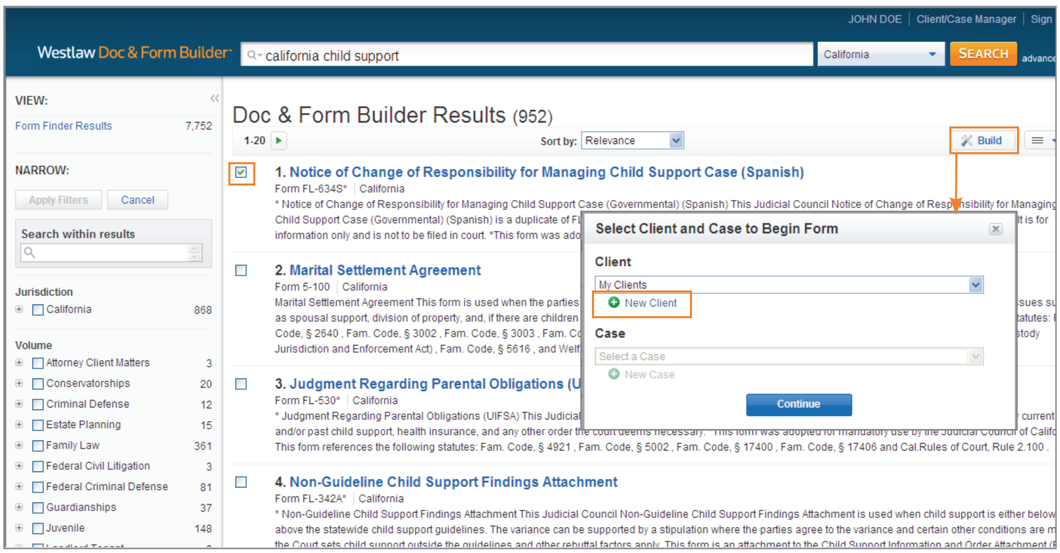

Figure 9. Creating a new client or case from a result list

EDITING CLIENT OR CASE INFORMATION

To edit client or case information, access the Client/Case Manager and click the name of the client or case in the left column. Click Options at the top of the list and select Edit from the drop-down list that is displayed. Or click Edit next to the client or case name in the right column.

CLOSING CLIENTS OR CASES

When you have completed work on a client or case, you can add the case to a list of closed clients or cases for that client. To close a client or case, access the Client/Case Manager and follow these steps:

1. Click the name of the client or case in the left column.
2. Click Options at the top of the list.
3. Select Close from the drop-down list that is displayed.

To reopen a client or case, click its name under *Closed Cases* in the left column. Click Options at the top of the list and select Reopen from the drop-down list that is displayed.

DELETING CLIENTS OR CASES

To delete a client or case, access the Client/Case Manager and click its name in the left column. Then click Options at the top of the list. Select Delete from the drop-down list that is displayed.

SHARING CLIENTS OR CASES

To share a case with a colleague, follow these steps:

1. Click the name of the client or case in the left column.
2. Click Options at the top of the list.
3. Select Share from the drop-down list that is displayed.
4. In the dialog box that is displayed, type the name of the person or group in the text box. Or click Contacts in the upper-right corner to display a list of people and groups. Click the name of the individuals or groups you want to add (a green check mark will appear beside their name when they are selected) and then click Insert Contacts.
5. Click Continue. A list of groups or individuals who have sharing permission for that case is displayed. To remove sharing permission for an individual or group, click the X icon next to the name.
6. To share the case with the selected individuals or groups, click Share.

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