WestlawNext provides you a way to organize, manage, and share your research when you store documents and snippets of text in folders. You can share the research in your folders with coworkers—thereby establishing a valuable pool of collective knowledge that can be easily tapped by anyone in your organization—and with outside counsel, co-counsel, and colleagues in other organizations—thereby sharing your expertise and facilitating cooperation.

Sharing a Folder

To share a folder for the first time, complete these steps:

1. Click Folders at the top of the home page to display the Folders page.
2. Click the name of the folder or subfolder you want to share. If you choose a folder containing subfolders, you have the option of sharing the subfolders as well.
3. Click the Share folder icon ( ) on the tool bar or choose Share from the Options drop-down list (Figure 1) to display the Share dialog box (Figure 2).
4. To share the folder with a person or group within your organization, type a name in the text box and select the name of the person or group with whom you want to share the folder from the displayed list. The person or group you selected is now displayed in the Share dialog box (Figure 3).

You can also click Contacts to display the Contacts dialog box (Figure 4) and select the people or groups within your organization with whom you want to share the folder. Then click insert Contacts to display the people or groups you selected in the Share dialog box (Figure 3).

To share the folder with a WestlawNext user outside your organization, type a valid email address for the person. **Note** You can share with only one person per external email address.
5. After all the people and groups with whom you want to share the folder are listed in the Share dialog box, click **Continue**.

If you are sharing with people outside your organization, you will be asked to provide your email address. Type your email address in the text box and click **Continue** (Figure 5).

![Figure 5. Dialog box for sharing with people outside your organization](image)

6. A list of the people and groups you selected is displayed under **Shared With** on the left side of the Share dialog box; their roles are displayed on the right side (Figure 6). Your role is listed as **Owner**. Choose **Reviewer** or **Contributor** from the drop-down lists under **Roles** for each person (see page 8, **Roles in Folder Sharing**). Click the X next to a person or group to remove that person or group from the shared folder.

A Pending icon will be displayed next to the names of external people until they accept your invitation and you confirm their acceptance (see page 6, **Receiving a Shared Folder: External People**).

![Figure 6. Share dialog box with roles displayed](image)
7. Click **Share**. A message is displayed confirming that the folder has been shared with internal people or groups and that invitations have been sent to external people (Figure 7). Click the X in the confirmation message to close it. The folder icon in the heading for shared folders is blue and the heading displays the number of people and groups with which the folder is shared.

![Figure 7. Confirmation message](image)

Icons for folders you have shared with other people and groups are also colored blue in the folder list displayed on the Folders page (displayed when you click **Folders** at the top of any WestlawNext page). Folders that other WestlawNext users have shared with you are displayed under **Shared with Me** on the this page (Figure 8).

![Figure 8. Shared folders listed on the Folders page](image)
Receiving a Shared Folder: Internal People and Groups

People within your organization are notified of your invitation to share a WestlawNext folder when they sign on WestlawNext (Figure 9). The shared folders are automatically displayed on their Folders page under *Shared With Me* (Figure 10). When you click a shared folder, you can see the dates that documents were added and which person added the documents under the *Date Added* and *Added By* columns.

![Figure 9. Notification of an invitation to share folders](image)

To opt out of a shared folder, select the folder or subfolder and click the *Share* folder icon on the tool bar or choose *Folder Sharing* from the *Options* drop-down list to display the Folder Sharing dialog box. Click the X next to your name to remove yourself from the shared folder (Figure 11).

![Figure 10. Shared folder](image)

![Figure 11. Opting out of a shared folder](image)
Receiving a Shared Folder: External People

People outside your organization are invited to share a WestlawNext folder via an email message (Figure 12). The invitee must click View Invitation in the email message, then sign on to WestlawNext (Figure 13) and either accept or decline the invitation (Figure 14). If the invitation is accepted, a confirmation message is displayed in WestlawNext (Figure 15) and an email message is automatically sent to you as the folder owner (Figure 16). You must click Confirm/Deny in the email message, sign on to WestlawNext and click Confirm to confirm the invitee’s acceptance (Figure 17). A confirmation message is displayed in WestlawNext (Figure 18) and an email message notifying the invitee that you have confirmed the folder sharing will be sent automatically (Figure 19).

The external person can now access the shared folder on WestlawNext (Figure 10).

Figure 12. Email invitation to share folders

Figure 13. WestlawNext sign-on page

Figure 14. Invitation to an external person

Figure 15. Confirmation message
WestlawNext Quick Reference Guide

From: westlaw@westlaw.com
To: steve.pederson@thomsonreuters.com
Sent: Fri 11/11/11 4:53 PM
Subject: Confirmation needed to complete sharing with John Stenrud on WestlawNext

John Stenrud (john.stenrud@stenrudmehta.com) accepted your invitation to share folders on WestlawNext. This invitation is still pending. Please confirm by 11/25/2011 or the invitation will expire automatically.

Figure 16. Email message sent to folder owner

From: westlaw@westlaw.com
Sent: Fri 11/11/11 9:02 PM
Subject: Steven Pederson is share folders with you on WestlawNext

Steven Pederson confirmed sharing folders with you on WestlawNext. Contact Steven Pederson if you have any questions.

Figure 19. Email message sent to invitee

Figure 18. Confirmation message

Figure 17. Owner's confirmation of invitee's acceptance
Roles in Folder Sharing

When you share a folder, you are the owner of the folder. As owner, you decide which persons or groups have access to the folder and what level of access each person or group has.

- Contributors can add documents or snippets of text to the folder and create subfolders. They can also move or remove any documents that they saved in the folder.
- Reviewers can view documents and snippets of text but cannot add their own documents or share the folder with others.

The owner is the only one who can add or remove contributors or reviewers, or end the folder sharing.

You can select the role for each person or group listed in the Share dialog box. Choose Reviewer or Contributor from the drop-down lists under Roles for each person or group. Click the help icon ( ) next to Roles for a reminder of how roles are defined (Figure 20).

Figure 20. Selecting roles for shared folders
Managing a Shared Folder

The folders you share with others continue to be displayed at the Folders page under My Folders. To manage a shared folder, select the folder or subfolder. Click the Share folder icon ( ) on the tool bar, choose Folder Sharing from the Options drop-down list, or click the Shared with … link to display the Folder Sharing dialog box (Figure 21). You can change the roles of the people or groups, add or remove contributors and reviewers, or end the folder sharing.

To end folder sharing, click End Sharing at the bottom of the Folder Sharing page (Figure 22).
Managing Documents in a Shared Folder

Any new documents or snippets added to a shared folder are clearly labeled and the documents in shared folders are continually updated by KeyCite®.

Note At this time, any highlighting or notes that anyone adds to a document in a shared folder cannot be shared.

If you are a reviewer or contributor to a shared folder, you can copy the content in the folder and save it as your personal, unshared folder, thereby ensuring your continued access to the documents in the folder. This is important when there is a possibility that the Westlaw® password of the folder owner may expire; for example, if the owner leaves the employ of an organization. Since the maintenance of all folders, including shared folders, are tied to an owner’s password, a folder will expire when the owner’s password expires.

To save the documents in a shared folder, follow these steps.

1. Open the shared folder.
2. Select the check box next to the title for each document you want to save or select the check box next to Title at the top of the list to select all the content in the folder.
3. Click the Save to Folder icon ( ) on the toolbar to display the Save to dialog box.
4. To copy the content from the shared folder to the folder of your choice, click the name of the folder in which you want to copy the content and click Copy (Figure 23).

Similarly, you can move content you have contributed to a shared folder. To move content, follow these steps.

1. Open the shared folder.
2. Select the check box next to the title for each document you want to save.
3. Click the Save to Folder icon ( ) on the toolbar to display the Save to dialog box.
4. To move the content from the shared folder to the folder of your choice, click the name of the folder in which you want to move the content and click Move.
Accessing Shared Folders on the WestlawNext iPad App

You can also access folders shared with you while using the WestlawNext app on an iPad®. While viewing the home page of the WestlawNext iPad app (Figure 24), tap the Folders icon at the bottom of the page to display the My Research page (Figure 25). Then tap Shared With Me to display a list of the folders that have been shared with you (Figure 26). Tap a folder icon to display a list of documents in the folder (Figure 27), then tap a document title to open the document.
Charges for Sharing Folders

Sharing Folders Within Your Organization
There is no charge to share a folder within your organization. Documents and text in a shared folder may be accessed at no charge for 12 months after the initial chargeable view by any individual within the organization with whom the folder is shared.

Sharing Folders Across Organizations
There is no charge to share a folder with people outside an organization. Outside the organization, an initial chargeable view occurs the first time a document is viewed; it is charged according to the WestlawNext subscription plan of the person viewing the document. There is no charge for subsequent views within the following 12 months by anyone within an organization with which the folder is shared.