**RESEARCH TIME IS MONEY. SPEND IT COST-EFFECTIVELY.**

Advice and tips for WestlawNext® and Westlaw® research

**KNOW YOUR RESOURCES.**

**Law firm librarian** – Will have information about the firm’s print resources and electronic research systems and can assist you with difficult research. As different as firms are, so are their online legal research contracts! Before you begin, you need to know what the firm pays for, how clients are billed, which WestlawNext or Westlaw actions are billed to clients, and what online content is outside the firm’s contract.

**Westlaw account manager** – Will conduct summer associate and new associate training to introduce you to the firm’s online legal research contract, explain the firm’s preferences for online usage, and can assist if you forget your firm password.

**Westlaw Reference Attorneys** – Call before you’ve wandered down the wrong (i.e., expensive) research path. They’re available 24/7 at 1-800-REF-ATTY (1-800-733-2889).

**Training** – Your firm’s Westlaw representative is available for one-on-one research assistance and training. You can also go to www.westlaw.com and select Training Options to see a list of online trainings or set up training by telephone.

**DEVELOP YOUR RESEARCH PLAN.**

**Meet with your supervising attorney** – Discuss the assignment and consider these questions before you start:

> Is the issue jurisdiction-specific?
> Is it statutory, regulatory, or common-law based?
> Is there a relevant administrative or ADR (alternative dispute resolution) process?
> Are there key terms of art, a seminal case, or a controlling statute?
> Is previous research on similar topics available? Are there any in-house experts?
> How long should the assignment take?
> What is the work product’s format, and how long should it be?
> When is it due? Are there interim checkpoints?
> What is the best way to communicate with the partner or supervising attorney assigning the project?

**Review existing materials** – Your firm may have relevant memos, briefs, or motions in its document management system, such as West km®. Don’t “reinvent the wheel.”

**RESEARCH ASSISTANCE 24/7:**

1-800-REF-ATTY (1-800-733-2889)
Resolve any billing issues – Ask your supervisor which Client Identifier or Client-Matter Number you should use. You probably will need it to sign on for online research. Typically a Client-Matter Number is used to allocate costs.

Billing method (Transactional or Hourly) – When you use WestlawNext and Westlaw at a firm, you must select a billing method before you begin. Firms may default to one or the other; make sure you know which it is. The billing method determines how costs are allocated to the Client ID. If the firm has an online contract, it may bill some of the contract’s cost directly to the client, or the firm may absorb the cost.

> Transactional billing tracks your individual WestlawNext and Westlaw actions and attaches a cost to them.

  WestlawNext – Only four actions generate transactional charges: searches, document views, KeyCite® research, and document deliveries.
  • The cost for searching is the same, regardless of how much information you search
  • There is no charge for narrowing and filtering search results to find the results most on-point
  • There is no charge for viewing a results list or browsing tables of contents, indexes, or the Key Number Digest; until you search or select a document from one of these, there’s no charge

  Westlaw – Transactional charges apply to the use of the Find by citation text box, finding by hyperlink (not from a search result list), KeyCite, and searches.
  • The bigger the database, the more expensive the search likely will be; search only what you need
  • There is no charge for navigating your search results, reading documents on your result list, using Locate in Result, or editing tabs and preferences
  • There is no charge for viewing the directory, tables of contents, indexes, or the Key Number Digest; you do not incur a charge until you run a search or click through to a document or section

> Hourly billing tracks the time you spend online and bills for it by the minute, not by the hour.

  WestlawNext – Varying rates apply to viewing the home page, a result list, KeyCite, and a document; document-viewing rates vary by the document’s type and whether it is in or out of the firm’s plan.
  Westlaw – Each screen, service, database, and document has a different hourly rate.
  • Generally, the larger the database, the higher the rate
  • Use hourly billing for multiple searches in a database or for researching an issue from many angles
  • Use search field restrictions to locate more relevant material quickly
  • Contact a West Reference Attorney before you search and request help in creating a query
  • Compose your query in a word-processing document and then copy and paste it into the Search box

> Printing, Emailing, Downloading – These actions incur charges under both Transactional and Hourly billing for both WestlawNext and Westlaw. Depending on the firm, the document charge is per-line or per-document. Email or download whenever possible, so you can deliver the document again without another charge.

TOP 10 COST-EFFECTIVE RESEARCH TIPS.

1. Use the Citation(s) Included in Your Assignment.

Start with Find by citation and use the Key Number Digest to locate additional cases that have the same points of law.

  > On Westlaw, use Most Cited Cases from an applicable headnote to find additional cases sharing that topic and key number
  > On both WestlawNext and Westlaw, use Citing References to locate additional authority that cites to your citation; when you use Transactional billing, there’s no charge to limit the display
WestlawNext: Select Citing References and a content set in the left column; you can Narrow to a particular jurisdiction, date, depth of treatment, headnote, and treatment status, or locate to a particular Terms & Connectors search.

Westlaw: If you need to limit the list, filter it by document type, jurisdiction, headnote, date, and depth of treatment, or locate to a Terms & Connectors search.

2. Use the Table of Contents (TOC).

If you’re not sure where to begin, start Transactionally and browse the TOC of Secondary Sources. Under Transactional billing on WestlawNext and Westlaw, there’s no charge until you click through to view a section or run a search.

- Legal encyclopedias and treatises help you become familiar with the terms of art and direct you to the appropriate topics and key numbers and primary law
- CJS®, Am.Jur®, and ALR® are familiar to most law students, but don’t forget to use jurisdictional and practice area titles as well, either in print or online

WestlawNext – If a publication has a TOC, you see it right away!

Westlaw – To find a TOC:
- Select Site Map in the top-right of any screen
- Select Table of Contents under Browse Westlaw
- Drill through the jurisdictions and content sets

3. Choose the Smallest Database on Westlaw.

Think jurisdiction and practice area with Westlaw. Smaller database = smaller cost. Common abbreviations:

- XX represents a state postal abbreviation (XX-CS = a state’s cases; CA-CS = California state cases)
- XX-CS-ALL = all state and federal cases in one state
- CTA = U.S. Court of Appeals cases in all circuits
- # represents a Court of Appeals circuit (CTA#)
- DCT = U.S. District Court Cases
- FED#-ALL = All federal court cases in one circuit


WestlawNext – Search as broadly as is reasonable. Make sure your result list is set to display Most Detail so you can learn more about the document without having to view it.

Westlaw – Use broad, less-restrictive connectors to build a substantial list of relevant documents. Before you search, use the Thesaurus link to find and include synonyms in your Terms & Connectors search.

5. Use Tools to Refine the Results of Your Search.

Filtering options on WestlawNext and Locate in Result on Westlaw are not charged as transactions and are quick ways to move through results lists when billing Hourly. Do not use the Back and Forward buttons on your Internet browser, because you will incur an additional charge. Instead, choose Cancel Filter or Cancel Locate.

WestlawNext – Use the Filtering options to narrow to a concept or a type of material.

Westlaw – Try shrinking your connectors after running a broad search in a large database. You also can use the Synopsis/Digest field to find cases in which your terms are significant or a particular attorney or judge is on record.

Examples:
- sy,di(serious /5 health-condition)
- at,ju(posner)

6. Use History or the Research Trail.

Access them Transactionally, then return to the search, again Transactionally, before 2 a.m. the next day at no additional charge.

7. Folders, Folders, Folders!

On WestlawNext there is no charge to save documents to a folder, and there is no limit to the number of folders you can create or the amount of material you can put into them. Once you’ve viewed a document and moved it to a folder, there is no charge to view it again from the folder for the next 365 days. If you put something in a folder without viewing it, an asterisk next to its title reminds you there will be a charge if you view it.
8. Use Copy with Reference.
Copy the text from any document and paste it, along with its citation, into a word-processing document, email message, etc. There is no charge on WestlawNext or Westlaw when you use Transactional billing. There is a charge with Hourly billing.

9. Use the WestlawNext Efficiency Tools!
There are no transactional charges for taking notes or making highlights within a document on WestlawNext. Do it all at once and save your work to a folder to eliminate the effort (and possible cost) of printing and then making notes.

The West Digest is the ultimate outline. On WestlawNext under Tools, select West Key Number System. On Westlaw, select Key Numbers at the top of any research screen and select from the three options:
   - Search for Key Numbers – like a Natural Language search through the digest
   - Key Number Digest Outline – drill through the outline itself and browse. With Transactional billing, there is no charge until you search
   - KeySearch – it’s powered by the West Digest; select from legal topics and subtopics, and it identifies relevant topics and key numbers and creates a Terms & Connectors query

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