GETTING STARTED GUIDE
Contact Us

Westlaw Technical and Search Assistance (available 24 hours a day)
If you have general or technical questions about Westlaw®, call Technical Support at 1-800-WESTLAW (1-800-937-8529).
If you have search questions about Westlaw, call the Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889).

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

Reference Materials
For free reference materials, training, and support go to legalsolutions.thomsonreuters.com/law-products/westlaw-legal-research/training-support.
Westlaw also contains online Help.

Additional Resources
For additional resources and/or access to your Account Manager, please visit www.lawschool.westlaw.com.
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Westlaw Home Page Overview

Whenever you begin a research session, you start your research from the Westlaw home page. At the home page, you can retrieve a document by citation, a case by party name, a specific publication or specific content, or search for documents using the Search box at the top of the page. You can also browse content using the links in the Browse pane.

**A Search Box**
Type your issue in simple descriptive words or Terms and Connectors. Or, type a citation. The search format will automatically be recognized.

**B Jurisdiction Selector**
Choose up to three jurisdictions before running a search.

**C Client ID**
Allows you to track the time you spend on research projects.

**D Folders**
Access recently used folders from a list or click the link to view all of your folders.

**E History**
Access recent documents and searches from the list or click the link to access your research history for up to a year.

**F Alerts**
Stay up to date on news, legal developments, and the status of your cases.

**G Profile Settings**
View or change Westlaw Preferences and your OnePass profile. Or, sign out of Westlaw.

**H Browse**
Navigate content from a particular set or practice area before searching.

**I Favorites**
Add content pages to your Favorites pane for easy access from the home page. Click on the Favorites link in the header to view and organize your Favorites.

**J Custom Pages**
Create a page with all of your frequently used content on one page, plus tools such as KeyCite Citation and Alerts.

**K News and Insight from REUTERS**
Rotating articles showcase insight and legal analysis from current news.

**L Edit Home Page**
Choose to show or hide select home page features.

**M Preferences**
Set preferences for searching, delivery, citations, and more.

**N Help**
Access video tutorials and documentation on the Westlaw Training and Support Page.

**O Sign Off**
Sign out of Westlaw.
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, 127 sct 2162, in the Search box and click the Search icon. To retrieve multiple documents by citation, type the citations, separated by semicolons, in the Search box and click the Search icon.

To retrieve a case by party name, begin typing the party name in the Search box and select the case from the drop-down list.

Additionally, materials can be retrieved by performing searches using KeyCite Boolean Terms and Connectors, descriptive terms, and docket numbers. Type general inquiries or descriptive terms to retrieve secondary sources and other additional documents as well as relevant legal documents. Westlaw Answers provides general answers to many legal questions and can be used as a starting point for your research.

<table>
<thead>
<tr>
<th>Search Types</th>
<th>Examples</th>
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<tr>
<td>Find by Citation</td>
<td>562fs263</td>
</tr>
<tr>
<td>Find Multiple Citations</td>
<td>562fs263; 97 sct 569; 42 u.s.c.1983</td>
</tr>
<tr>
<td>Find by Party Name</td>
<td>citizens united (select case from drop-down list)</td>
</tr>
<tr>
<td>KeyCite</td>
<td>keycite 93 sct 1817 or kc: 93 sct 1817</td>
</tr>
<tr>
<td>Secondary Sources or Content Name</td>
<td>Wright and Miller California State cases</td>
</tr>
<tr>
<td>Boolean Terms and Connectors</td>
<td>dedicate /s “private road” “public road”</td>
</tr>
<tr>
<td>Descriptive Terms</td>
<td>can a municipality be held liable for civil rights violations by its employees</td>
</tr>
<tr>
<td>Docket Numbers</td>
<td>2008 WL 2788753</td>
</tr>
<tr>
<td>Westlaw Answers</td>
<td>Quick answers to common legal questions</td>
</tr>
<tr>
<td></td>
<td>1) What are the elements of fraud? 2) What is the definition of practice of law?</td>
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Researching a Legal Issue
When you run a search, you search all of the core legal content on Westlaw by default. Core content comprises cases, Key Numbers, trial court orders, statutes and court rules, regulations, administrative decisions and guidance, Practical Law™, 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 relate to your legal issue or by using Boolean Terms and Connectors.

Searching Using WestSearch, the Westlaw 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.

A WestSearch
A search engine designed for law, WestSearch incorporates 125 years of exclusive proprietary analysis of the law and tools such as Key Numbers, KeyCite, headnotes, notes of decisions, indexes, and secondary sources to deliver relevant documents, even if they use phrasing that is different from your query.

B 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, or most used.

TIP
Click the down arrow icon in the Search box to access up to 20 of your most recent searches.
Boolean Terms and Connectors

Westlaw 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 in the same paragraph.

AUTOMATIC DETECTION

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

EXAMPLES

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

Connectors and Expanders

& AND
/s In same sentence
or OR
+s Preceding within sentence
/p In same paragraph
- Phrase
+p Preceding within paragraph
% But not
/n Within n terms of
! Root expander
+n Preceding within n terms of
* Universal character

TIP

• Use the jurisdiction selector or browse to the content you want to search before entering your query.
• When used without connectors or fields, ampersands (&) and spaces (OR) are considered part of a descriptive terms search. Use Advanced Search or look for WestSearch’s suggestion to modify your results to documents that include these connectors after running your initial search.
Advanced Search
Advanced Search templates help you quickly build precise queries, making it easy to search for specific content within a jurisdiction or specific information within document fields.

1. **Accessing Advanced Search**
   Click **Advanced** next to the Search icon to display the Advanced Search page.

2. **Content-Specific Fields**
   The fields available in a template are specific to the content or document type you are viewing when you click **Advanced**.

   **TIP**
   Individual content pages have Advanced Search templates tailored for their content. Browse to an individual page (such as California Cases) and click **Advanced Search** to see the options available for that content set.
Browsing by Content

There are several ways you can retrieve content in Westlaw. Running a search from the Westlaw home page will return results in the core content areas. To search for a specific type of content, start from the Browse sections, click the tab from which you want to begin your search (All Content, Federal Materials, State Materials, or Practice Area), and click the most applicable link of various content types or jurisdictions to narrow the content.

When you click a link to specific content, Westlaw presents additional content categories that help discern the specific content you are looking for. Additionally, a corresponding search box is displayed at the top of the page. Use the search box to search within the specified category, or continue clicking additional category links until you have reached the desired content. The categories within each collection will depend on what content you are browsing.

1. Browse to content under:
   - All Content
   - Federal Materials
   - State Materials
   - Practice Area

2. Navigate Further
   Browse until you reach the jurisdiction or content area you want to search.

3. Search Box
   Type your search terms at the top of the page.

TIP
Click the star icon (★) next to content to add the pages to your Favorites for quick access from the home page.
West Key Number System

The West Key Number System® is the master classification system of U.S. law and widely regarded as the cornerstone of effective legal research. The West Key Number System is a proprietary component of the WestSearch legal search engine, which sets Westlaw apart. Our attorney-editors 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 which 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

1. In the Browse section, click Key Numbers.
2. Or, on the Tools tab, click West Key Number System.

WEST KEY NUMBER SYSTEM PAGE

3. Use the Search box on the top to search for Key Numbers relevant to your issue, or
4. Browse for relevant topics and Key Numbers.
5. Click a key number to see its details. Then click a topic heading to view results relevant to your selected jurisdiction.

GLOBAL SEARCH RESULTS

West Key Numbers appear in global search results after running a plain language search.

TIP

Document headnotes located in cases also provide easy access to key number-specific results relevant to the document’s jurisdiction.
Refining Search Results

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

A. Choose a Content Type
Click a content category in the left column to display the result page for that content.

B. Relevant Results by Content Type
The top results from each content type are included in the Overview.

C. Save to Folder icon
The Save to Folder icon allows you to save results you select to a folder in Westlaw. Select the check box preceding each entry you want to save, and click the icon.

D. Delivery icon
The Delivery icon allows you to export results you select. You may email, print, or download the results. You can download the results to your computer, Dropbox, Amazon® Kindle®, or Case Notebook™. Select the check box preceding each entry you want to export, and click the icon.
Refining Search Results (continued)
From the Overview page, click a content category and you will see that Westlaw provides tools to help you further refine your search.

**Search Box**
Type a new search at the top of any page.

**Content List**
Navigate to other content types.

**Sort by**
Relevance, Date (reverse chronological), Most Cited, Most Used

**Create KeyCite Alert Entry**
Create an alert for your search.

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

**Save Documents to a Folder**
Keep documents for later use.

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

**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
- Search within Results
- And more...

**Research Icons**
Indicates 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
- Search within Results
- And more...
Viewing a Document

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

A Document Title
Quickly scan the title, court, date, and citations.

B Tabs Powered by KeyCite
Access additional content related to the document.

Cases
- Filings
- Negative Treatment
- History
- Citing References
- Table of Authorities

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

C Return to List
Click this button to go back to your search results.

D Previous and Next
Move through documents in your search results.

E Browse by Search Term
View the portions of each document that contain your search terms.

F Show KeyCite Flags
Display KeyCite flags for citations that appear inline with the text of the case.

G Go to
Jump to specific sections of the document.
- West Headnotes
- Attorneys and Law Firms
- Opinions
- All Citations
- Page Number

H Create KeyCite Alert Entry
Create an alert for this document.

I Search Document Text
Search text in this document.

J Display Options
Adjust the document font styles, sizes, and margins.

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

L Save to Folder
Save the document to a folder.

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

N Full Screen Mode
Expands the document view for easier reading.
Workflow Tools

The workflow tools found on all document pages are designed to make 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.

A Research Icons
Indicate previous document activity
- Previously viewed in the last 30 days.
- Saved to Folder
- Note Added

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

C Selected Text Menu
When you select text in a document, Westlaw provides the following features:

- Save to a Recent Folder
  Allows you to save selected text to a 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 and share a note with colleagues.

- Highlight
  Allows you to highlight text for later reference. You can also share highlighted text.

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

TIP
When you use the Copy with Reference feature, you can choose from over 30 state and national citation formats, including Standard and ALWD.
Checking Citations in KeyCite

KeyCite, the industry’s most complete, accurate, and up-to-date citation service, verifies whether a case, statute, court rule, regulation, or administrative decision is still good law. It’s the only online citator to do so directly on the face of the document and on a result list.

A 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.
- A blue-striped flag warns that the case has been appealed to the U.S. Court of Appeals or the U.S. Supreme Court (excluding appeals originating from agencies).

Checking Statutes in KeyCite

- A red flag indicates 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.

B Negative Treatment

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

TIP

Accessing KeyCite

Type one of the following with a citation in the Search box:

- keycite
- keycite:
- kc
- kc:

Example:

`keycite 93 sct 1817`
Viewing Citing References

KeyCite provides a list of cases, administrative materials, secondary sources, briefs, and other court documents that cite your document and ensures you are citing good law. Additionally, KeyCite provides more citing references for more types of documents than any other citation service.

A Access Citing References
To view documents that cite your document, click the Citing References tab.

B Sort
To change the order in which the citing references are displayed, click an option in the Sort By list on the toolbar.

C Filter
To narrow the list of citing references, you can
- Type terms in the Search within results box 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 Topics.

D 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.

- Examining 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 need a copy of a document, Westlaw offers multiple options for document delivery. Documents, snippets, and result lists can be emailed, printed, or downloaded from nearly every page in Westlaw. Documents can also be sent directly to your Amazon Kindle or Dropbox, exported to Case Notebook, or saved to a folder.

A Delivery Icon
The last delivery method you used is displayed. The default method is print.

B 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 the default delivery format and other delivery options, click Preferences at the bottom of any page, then click the Delivery tab.
Folders
Documents that you add to your folders are saved on Westlaw for as long as you choose. Click **Folders** at the top of any page to display the Folders page.

A. **My Folders**
Create, manage, and navigate your folders.

B. **New**
You can create as many folders as you need.

C. **Options**
Copy, move, rename, delete, export, send to Amazon Kindle or Dropbox.

D. **Research Report**
Send a professional report summarizing the research in your folder.

E. **Copy or Move**
Copy or move contents of the folder.

F. **Deliver**
Email, print, download, or send to Amazon Kindle or Dropbox.

G. **Delete**
Deleting items moves them to the Trash. Items are not permanently deleted unless you empty the Trash.

H. **Folder Analysis**
Find suggestions for additional relevant cases.

I. **Narrow**
Sort and filter your folders to find what you are looking for quickly and easily.

J. **Search within Results**
Search for documents and snippets within your folders.

K. **Add a Description**
Point to a document in your folder, then click the pencil icon to add a description to the document.

L. **Current KeyCite Information**
Documents that you save to folders are automatically updated by Westlaw 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 Westlaw is automatically saved for one year and includes all document views and searches.

A Recent Documents and Recent Searches
Hover over History to see your five most recent documents and five most recent searches.

B Complete History
Click History at the top of any page to view your complete history from the past 12 months.

C Search within Results
Search within your history or use filters to find specific documents.

TIP Clicking History is the quickest way to pick up where you left off during your previous Westlaw session.
Alerts
Alerts help you keep current on recent developments. Alerts include:

- **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
- **Court Wire Alert** – same-day reports of newly filed cases
- **Publication Alert** – receive the latest documents from a particular publication as soon as they are published on Westlaw
- **Company Investigator** – track a company’s business information, potential assets, or potentially adverse information
- **Business Law Center Alert** – flexible functionality to create alerts for transactional research
- **Capitol Watch Track** – follow federal or state bills and regulations

1. **Accessing the Alerts Page**
   Click Alerts at the top of any page to display the Alerts page.

2. **Creating an Alert**
   Click Create Alert, then click the type of alert you want to create on the menu.

3. **Viewing Your Alerts**
   Click an alert type to view your alerts.
Preferences
You can customize many aspects of your Westlaw research session using the Preferences page.

A Accessing Preferences
To access the Preferences page, click Preferences at the bottom of any page.

B Search Preferences
Set the default sort order of your search result by content type.

C Delivery Preferences
Set the default document format, file type, layout, and included content.

D Citations Preferences
• Set the default citation format and style for use in the Copy with Reference feature; choose from over 30 citation formats
• Choose how you would like to include parallel citations
System Requirements
To get the fastest, most reliable performance with Westlaw, make sure your computer meets the system requirements and you are using an updated browser.
You will need the following to operate Westlaw:

SUPPORTED OPERATING SYSTEMS
• Windows 7, 8.1, and Windows 10
• Windows Vista®
• Mac® OS 10.5 or later

INTERNET BROWSER
• Internet Explorer® 11 or later (Windows only)
• Mozilla™ Firefox® current version or Extended Support Release Version
• Safari® 5.0 or later
• Chrome current version

OTHER REQUIREMENTS
• 1024 x 768 or higher screen resolution
• Adobe® Acrobat Reader 9.0 or later (some print functionality is lost with older versions)
• Adobe Flash
Using the Westlaw iPad® and iPhone® App

Access the same power and collaboration that Westlaw provides on your computer while on the go. The Westlaw iPad and iPhone app is free for existing Westlaw users. Simply download the Westlaw app from the Apple® iTunes Store.

**IPAD**

Continue your research while you are away from the office.
- Run searches with WestSearch and filter the results
- Access KeyCite information, research history, favorites, and frequently used content
- Add notes and highlighting to documents
- Organize your research with folders
- Share your research with folders
- Save, annotate, and view documents online and offline

**BEST LEGAL RESEARCH IPAD APP**

Best of the The National Law Journal® Survey (2012-2016)


**IPHONE**

Stay current with the Westlaw iPhone app.
- Get customized current awareness updates and news for your practice area
- Track and follow companies with up-to-date news and docket updates
- Receive your Westlaw Alerts within the app
- Customize your push notifications
- Plus, all the functionality to run searches, access folders, and more
LOOKING FOR MORE INFORMATION?

Westlaw is available on the Web at westlaw.com.
For assistance using Westlaw, call 1-800-WESTLAW (1-800-937-8529).
For free reference materials, visit legalsolutions.com/westlaw-support.