





Using Folders to Organize Your Research

Folders on WestlawNext help you organize and manage your research by allowing you to store your documents and snippets of text in folders. (Searches are saved in History.) The folder that is displayed on the right side of the home page and at the top of all other pages is called the *active folder*. To display the contents of the active folder, click the folder.

To change the active folder, click the active folder and then click the **Change Folder** icon (). The Change Folder dialog box is displayed. Select the folder that you want to be the active folder and click OK.

Saving Documents and Text in a Folder

Saving the Document You Are Viewing

To save the document you are viewing, click the **Save to Folder** icon () on the document toolbar. Select the folder in which you want to save the document and click **Save**. If the document is successfully saved in the folder, a confirmation message is displayed.

Saving Documents in a Result List

To save documents in a result list, select the check boxes next to the documents you want to save and click the **Save to Folder** icon. Select the folder in which you want to save the documents and click **Save**.

Saving Selected Text

To save selected document text in your active folder, select the text you want to save and choose **Save to ...** from the pop-up menu (Figure 1). A message is displayed confirming that the text has been saved.

WestlawNext is available on the Web at next.westlaw.com.

Category:
Research Fundamentals

For research assistance 24 hours a day, seven days a week, call the West Reference Attorneys at 1-800-850-WEST (1-800-850-9378).

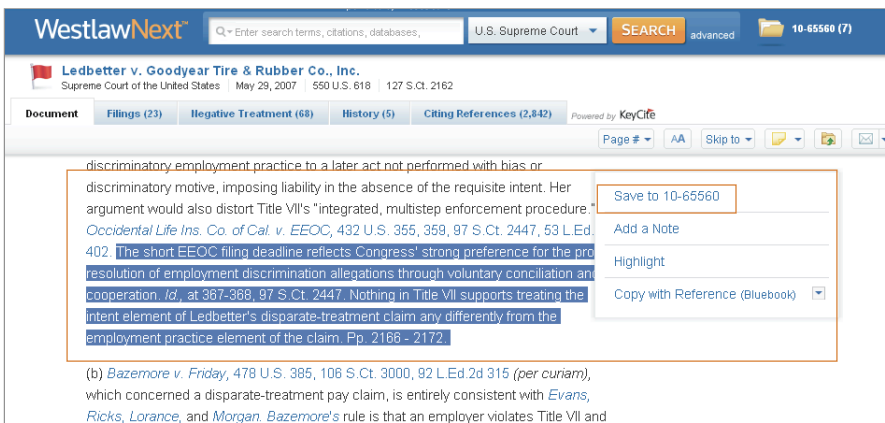


Figure 1. Saving text in your active folder

Viewing Saved Documents and Text

To view the documents or text saved in your active folder, click the active folder. To view documents or text saved in other folders, click **Folders** at the top of the page. A list of all your folders is displayed. Click the folder containing the items you want to view. A list of all items in the folder is displayed.



Managing Folders

You can manage your folders at the My Folders page (Figure 2). To display the My Folders page, click **Folders** at the top of any page. At the My Folders page, you can

- create a new folder
- copy or move a folder
- rename a folder
- delete a folder
- export documents from a folder

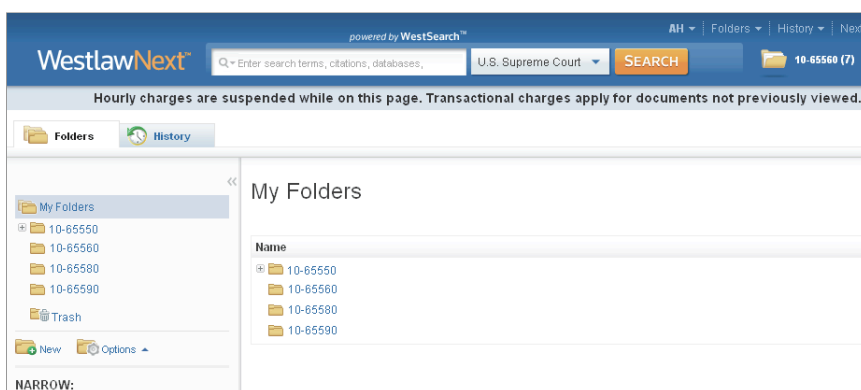


Figure 2. My Folders page

Creating a New Folder

To create a new folder at the My Folders page, click **New** in the left column. The New Folder dialog box is displayed (Figure 3). Type a name for the new folder in the *Folder Name* text box, select a location for the folder, and click **OK**.

You can also create a new folder while viewing a document or a result list. After clicking the **Save to Folder** icon, click **New Folder** to display the New Folder dialog box. Type a name for the new folder in the *Folder Name* text box, select a location for the folder, and click **OK**.

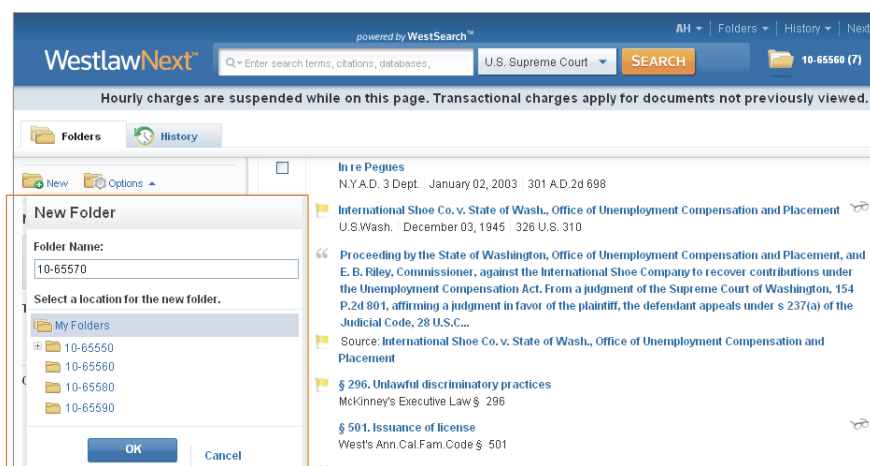


Figure 3. New Folder dialog box

Moving or Copying a Folder

To move or copy a folder to a different folder, complete these step:

1. At the My Folders page, select the folder you want to move or copy.
2. Click **Options** in the left column and choose **Move** or **Copy** from the menu (Figure 4). The Move Folder or Copy Folder dialog box is displayed.
3. Select the folder to which you want to move or copy the folder.
4. Click **Move** or **Copy**. A message is displayed indicating that the folder has been moved or copied.

Renaming a Folder

To rename a folder, complete the following steps:

1. At the My Folders page, select the folder you want to rename.
2. Click **Options** in the left column and choose **Rename** from the menu. The Rename Folder dialog box is displayed.
3. Type the new name for the folder in the *Folder Name* text box and click **OK**.

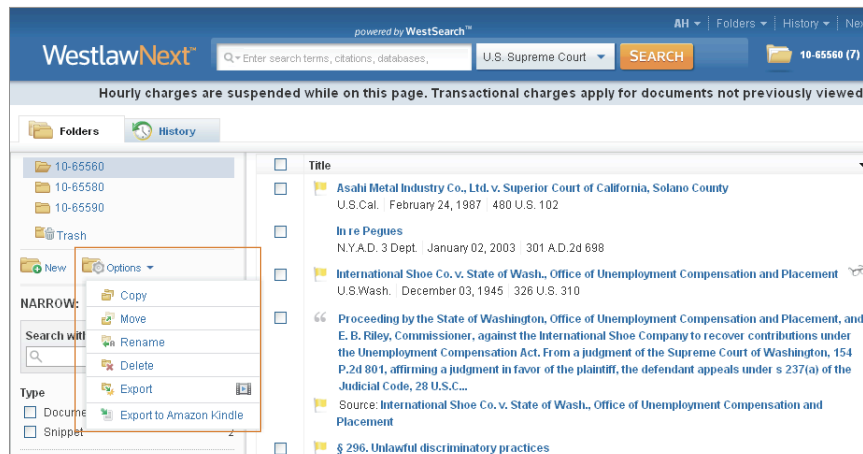


Figure 4. Options menu

Deleting a Folder

To delete a folder, complete the following steps:

1. At the My Folders page, select the folder you want to delete.

Note You cannot delete the active folder.
2. Click **Options** in the left column and choose **Delete** from the menu. The Delete Folder dialog box is displayed.
3. Click **OK** to delete the folder. All items in the folder, including subfolders, are deleted.

Deleting an Item in a Folder

To delete a document or a snippet in your active folder, click the folder. Then select the check boxes next to the items you want to delete and click the **Delete** icon (✖).

To delete a document or snippet in another folder, access the My Folders page. Click the folder containing the items you want to delete. A list of all items in the folder is displayed in the right column. Select the check boxes next to the items you want to delete and click the **Delete** icon.

Exporting Documents from a Folder

To export documents from a folder to a file on your computer, complete the following steps:

1. At the My Folders page, click **Options** in the left column and choose **Export** from the menu. The Export dialog box is displayed.
2. Select the check boxes next to the folders from which you want to export documents and click **Next**.
3. Select one of the following options in the *What to Deliver* section in the Export dialog box (Figure 5):
 - **List of Folder Contents** to download a list of the documents in the folders
 - **Documents** to download the full text of documents in the folders
4. Choose a format from the *Format* drop-down list. If you are exporting the full text of documents, use the *As* drop-down list to specify whether you want the documents delivered in a single, merged file or in multiple files (zipped).
5. Click the **Layout and Limits** tab and select the check boxes for the elements you want to include in the documents.
6. If you are exporting the full text of documents, click the **Content to Append** tab and select the check boxes for the content you want to append to the documents.
7. Click **Export**. When the Ready for Download dialog box is displayed, click **Download**. Then click **Open** or **Save**.

Note You can also export documents from a folder to Amazon Kindle.

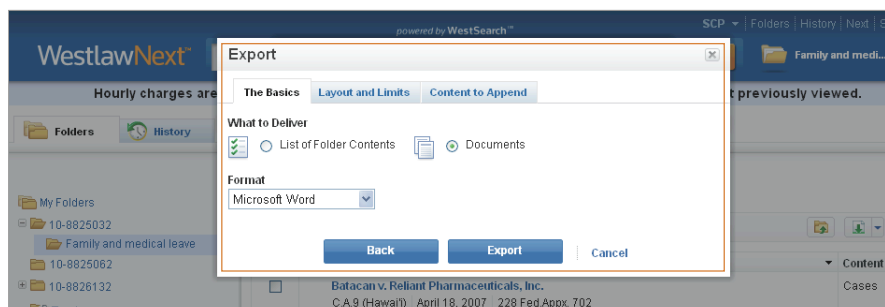


Figure 5. Export dialog box

Filtering by Item Type or Content Type

At the My Folders page, you can filter the items in a folder by item type or content type. Click the folder you want to view. A list of all items in the folder is displayed in the right column. Under *Narrow* in the left column, select the appropriate check box under *Type* or *Content Type* to restrict the list of items.

For assistance using Westlaw, call 1-800-850-WEST (1-800-850-9378).
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