# Using Westlaw Doc & Form Builder

## Contents

- Searching for Documents ........................................ 2  
- Using the Search Box ........................................ 2  
- Browsing for Documents by Jurisdiction or Topics .......... 3  
- Viewing the Results Page ..................................... 3  
- Previewing a Document ......................................... 4  
- Building a Document ........................................... 5  
  - Building a Graphical Form .................................. 5  
  - Building a Text Document ................................... 7  
- Using Building Options ......................................... 7  
- Accessing a Saved Document ................................... 8  
- Creating Document Versions ................................... 8  
- Using the Client/Matter Manager .............................. 9  
  - Working with Clients or Matters ............................. 9  
  - Creating a New Client or Matter ............................. 9  
  - Editing Client or Matter Information ....................... 10  
  - Editing and Printing Matter Answers ....................... 11  
  - Closing Matters ............................................. 11  
  - Deleting Clients or Matters ................................ 12  
  - Setting Sharing Permissions ................................ 12  
- Setting Preferences ............................................. 13  
  - Setting Document Format Preferences ..................... 13  
  - Setting Document Download Preferences .................. 13  
- Using Form Sets .................................................. 14  
  - Creating a Form Set ......................................... 15  
  - Sharing Form Sets ........................................... 16  
- Working with Multiple Forms ................................... 16  
  - Building Multiple Forms .................................... 16  
  - Downloading Multiple Forms ................................. 16

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

For free reference materials, visit legalsolutions.thomsonreuters.com/guides.
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 forms.westlaw.com.

**Search Box**
Type descriptive words or a Terms and Connectors query. Or type a form title or number.

**Jurisdiction Selector**
Choose up to 3 jurisdictions before running a search.

**Advanced**
Click **Advanced** to use fields to build a Terms and Connectors query.

**Browse Section**
Navigate to content before searching.

**Favorites**
Add content pages to your Favorites for easy access from the home page.

**Tools**
Tools from various jurisdictions are available to help with calculations and completing forms.

**Client/Matter Manager**
Organize and manage your clients and matters.

**Form Sets**
Save documents in Form Sets for easy access.

**Quick Start Videos**
Click a video to learn more about the tools and features in Doc & Form Builder.

**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 BOX**
To use the search box to search for documents, complete these steps:

1. To search across form titles and form numbers, type terms describing your document or form in the text box at the top of any page. Or click **Advanced** to use Boolean terms and connectors. You can also select a recent search by clicking the **Recent Searches** icon (โน่) 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 TOPICS

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 forms available in that volume.

Viewing the Results Page

After your search is run, an overview of the search result is displayed (Figure 2).

A Move to Next Group of 20
Click the arrow to move to the next group of 20 documents.

B Sort By
Relevance, Title, Form Number

C Form Finder Results
Click to view additional forms available through Form Finder on WestlawNext.
Note: These forms may not be included in your subscription.

D Filter
Select a filter, e.g., jurisdiction, document type, or subtopic, and click Apply Filters.

E Search within Results
Narrow your search result by typing terms in the box and clicking Search.

Figure 2. Results page
Previewing a Document

To preview a document, click its title in the Results page (Figure 3). The form is displayed with blank fields and all potential phrases and clauses, or as a scanned image of a blank document.

![Figure 3. Preview of a text document](image)

At the top of the document, a paragraph containing explanatory text is displayed. 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.

Click More to display the full explanatory text in a pop-up box (Figure 4).

![Figure 4. Explanatory text](image)

Click Save to Form Set to save the form to a Form Sets folder (Figure 5).

![Figure 5. Save to a Form Set](image)

Click Download Blank Form(s) to download the form.

Click Build to start preparing a document.
Building a Document

BUILDING A GRAPHICAL FORM

Note  Graphical forms may include official federal, state, or county forms or bar association forms.

When you preview a graphical form, the form is displayed as a scanned image of a blank form (Figure 6). If there is more than one page, navigation arrows are displayed.

Figure 6. Preview of a graphical form
When you click **Build**, the fillable form is displayed (Figure 7).

**Complete the Form**
Press the Tab key or Shift + Tab keys to move to the next or previous field.

**Font**
You can change the font style and size.

**Default Answers**
Allows you to save the answers that will auto-fill later.

**Templates**
Allows you to auto-fill your form. See “Working with Templates” below.

**Add Item**
Allows you to add a text box to the form.

**Help**
Display help content for the current question.

**Download**
Click Download when you have completed the form.

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**Working with Templates**
Templates feature allows you to auto-fill your forms. To work with templates, click **Templates** in the form you are building.

- To create a new template for the current form, click **New**. In the New Template dialog box, type a name for your template. By default, the template is saved as a Public Template and is available to everyone using Doc & Form Builder in your firm. Click **Private Template** to make the form available only to you. Click **OK**. The template is displayed in the Available Templates list.
- To save text entered in the form to a template, click the template in the **Available Templates** list and click **Save**.
- To apply a template to your form, in the **Available Templates** list, click a template and then click **Apply**.

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Figure 7. Graphical 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 and with all potential clauses (see Figure 3). To complete the form, click **Build**. The questions and text boxes for your answers are displayed in the left frame (Figure 8).

**Complete the Form**
Use the text boxes, lists, and plus symbols to complete the form.

**Question Mark**
Click to retrieve more information about the question.

**Previous/Next**
Click to move to the previous or next field.

**Default Answers**
Allows you to save answers that will auto-fill later.

**Exit**
You can save a partially completed document by clicking **Exit**.

USING BUILDING OPTIONS
When you click **Build** to begin building a document, the Select Client and Matter to Begin Form dialog box is displayed (Figure 9).

You have the following options:

- **Build without selecting a client or matter**—Select this check box if you want to build a form not associated with a particular client or matter. **Note** The information you enter is not saved.
- **Review Prior Answers**—Select this check box, then select a client and matter to review prior answers.
- **Create New Version**—This check box is available if you previously built the form for a particular client and matter. For further information, see “Creating Document Versions” on page 8.
- **Client**—To associate the form with a client, click the client in the list. To create a new client, click **New Client**. For further information, see “Creating a New Client or Matter” on page 9.
- **Matter**—To associate the form with a matter, click the matter in the list. To create a new matter, click **New Matter**. For further information, see “Creating a New Client or Matter” on page 9.
- **Continue**—If you previously worked in this form for a client and matter, you can return to your last location in the form by clicking **Continue**.
ACCESSING A SAVED DOCUMENT

To access a document you saved, complete these steps:

1. Click Client/Matter Manager at the upper-right corner of any page.
2. Click the name of the client to display the matters associated with that client.
3. Click the name of the matter 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 matter for which to build the form).

CREATING DOCUMENT VERSIONS

You can create multiple versions of a document or create the same document for more than one individual under the same client or matter. To create a different version of a document, access a saved document and click Build. In the Select Client and Matter to Begin Form dialog box, select the Create New Version check box, which is available only if you previously built the form. The Review Prior Answers check box is automatically selected for you (Figure 10).

Figure 10. Building versions of a document

After building the form, Doc & Form Builder automatically adds a version number to each version of the form (Figure 11).

Figure 11. Versions of a document
You can distinguish the versions of a form by adding a note to the form. To add a note, point to the title of the form to display the Add Note icon, shown outlined below. Click the Add Note icon, then type your note in the box and click Save (Figure 12).

![Figure 12. Adding a note to a document](image)

**Using the Client/Matter Manager**

The Client/Matter Manager (Figure 13) helps you organize clients and matters, share your work with others in your firm, and view documents in progress or completed documents. To access the Client/Matter Manager, click Client/Matter Manager at the upper-right corner of any page.

**Working with Clients or Matters**

**CREATING A NEW CLIENT OR MATTER**

You can create a client or matter in the following ways:

**From the Client/Matter Manager**

Access the Client/Matter Manager and click New, shown outlined in Figure 13. Complete the text boxes. To save the client or matter, click Save. To save the client and immediately add a matter for that client, click Save & Add Matter. You must create a client before you can add a matter.

![Figure 13. Creating a new client or matter using the Client/Matter Manager](image)
From a Result List or a Document

To create a new client or matter from a result list or a document, complete these steps:

1. In a result list, select the check box for the form you want to build, then click **Build** (Figure 14). From a document you are previewing, click **Build** in the upper-right corner of the document.

![Figure 14. Creating a new client or case from a result list](image)

2. In the Select Client and Matter to Begin Form dialog box (Figure 15), you can
   - click **New Client** to add a new client.
   - click **New Matter** to add a new matter to the client you created.

![Figure 15. Select Client and Matter to Begin Form dialog box](image)

3. Complete the text boxes.
4. To save the client or matter, click **Save**. To save the client and immediately add a matter for that client, click **Save & Add Matter**.

**EDITING CLIENT OR MATTER INFORMATION**

To edit client or matter information, access the Client/Matter Manager and click the name of the client or matter in the left column. Click **Options** at the top of the list and click **Edit** on the menu.
EDITING AND PRINTING MATTER ANSWERS

You can use the Edit Matter Answers feature to quickly make changes or corrections to existing client information. To edit a form, complete these steps:

1. Access the Client/Matter Manager and click the name of the client and the matter you want to edit (Figure 16).

2. Click Options at the top of the list and click Edit Matter Answers on the menu. The Matter Answers dialog box is displayed.

3. Click the question you want to edit, e.g., Petitioner's Full Name. Or type a term in the Filter Questions box to quickly find a question or answer you want to edit. The text box for the field is displayed (Figure 17).

4. Type your changes in the box and click Save. Once saved, any forms you create or build are auto-populated with the updated information.

To print the questions and answers after you make your edits, click Print Matter Answers at the top of the Matter Answers dialog box, shown outlined in Figure 17.

CLOSING MATTERS

Closing a matter retains the client information but inactivates the matter. To close a matter, access the Client/Matter Manager, click a client in the left column, then click the matter you want to close. Click Options at the top of the list, and then click Close on the menu. The matter is listed under Closed Matters by Client.

To reopen the matter, click it in the Closed Matters by Client list, then click Options and click Reopen on the menu.
DELETING CLIENTS OR MATTERS

To delete a client or matter, access the Client/Matter Manager and click the client or matter in the left column. Then click **Options** at the top of the list and click **Delete** on the menu.

**Note** Before you can delete a client, you must delete all matters for that client.

SETTING SHARING PERMISSIONS

When you create a new client, it is automatically shared with everyone using Doc & Form Builder in your firm. When you create a matter for that client, it is also automatically shared with everyone. You can use the Edit Sharing feature to set sharing permissions and limit access to the matter. To customize the sharing permissions for a matter, complete these steps:

1. Access the Client/Matter Manager and click the client and matter you want to customize.
2. Click **Options** at the top of the list and click **Edit Sharing** on the menu. The Edit Sharing dialog box is displayed (Figure 18).

![Edit Sharing dialog box](image)

**Figure 18. Edit Sharing dialog box**

3. For each user, in the **Roles** list, click the level of access you want to provide, e.g., **Owner**, **Editor**, **Read Only**, or **Denied Access**. For further information on the roles, click the question mark icon above the list.
4. Click **Save**.
5. Click **Close**.
Setting Preferences

SETTING DOCUMENT FORMAT PREFERENCES

You can set various document format defaults for your forms. To set formatting defaults, complete these steps:

1. Click Preferences at the bottom of any page. The Preferences dialog box is displayed.
2. Click the Document Formatting tab (Figure 19).
3. Use the check boxes and lists to set your default formats.
4. Click Save.

SETTING DOCUMENT DOWNLOAD PREFERENCES

Downloading Text Forms

You can download text forms to either Microsoft® Word or Corel® WordPerfect®. Click Preferences at the bottom of any page. Then, on the General tab, in the Download Format list, click Microsoft Word or WordPerfect and click Save (Figure 20).

Figure 19. Preferences dialog box–Document Formatting tab

Figure 20. Preferences–Downloading text forms
Downloading Graphical Forms

By default, graphical forms are downloaded as PDF files. To download a graphical form to Microsoft Word, click Preferences at the bottom of any page. On the General tab, Microsoft Word is selected by default in the Download Format list. Select the Apply my download format to Graphical Form content check box and click Save (Figure 21).

![Figure 21. Preferences–Downloading graphical forms](image)

Using Form Sets

The Form Sets feature

- allows you to save multiple forms in one place.
- allows you to skip duplicate questions.
- provides easy access to forms used for multiple clients.
- automatically updates saved forms when Doc & Form Builder updates the forms.

To access the Form Sets page, click Form Sets at the top of any page (Figure 22).

![Figure 22. Form Sets page](image)
CREATING A FORM SET

You can create a Form Set from the Form Sets page, or after browsing or searching for forms.

• To create a Form Set from the Form Sets page, click New (shown outlined in Figure 22). The New Form Set dialog box is displayed (Figure 23). Type the name for the Form Set, e.g., Family Law, in the box and click OK.

![Figure 23. New Form Set dialog box](image)

• To create a Form Set from a browse or search result list, select the forms you want to add to the form set, then click the Save to Form Set icon (Figure 24).

![Figure 24. Creating a Form Set from a list](image)

In the dialog box that is displayed (Figure 25), click New Form Set. Type a name for the Form Set, and click OK. Then click Save to save the selected forms to that Form Set.

![Figure 25. Creating a Form Set](image)
SHARING FORM SETS
To share a Form Set with colleagues, access the Form Sets page, then click the Form Set you want to share. Click Options, then click Share on the menu. The Share dialog box is displayed (Figure 26). Type the names or groups with whom you want to share the folder, or click Contacts and click a name or group in the list.

Figure 26. Share dialog box

Working with Multiple Forms
BUILDING MULTIPLE FORMS
You can build multiple forms from any list in Doc & Form Builder. When you build multiple documents, Doc & Form Builder automatically moves you through the forms and skips duplicate questions. Select the forms you want to build in the list and click Build. Once you complete the forms, the Assembly Complete dialog box is displayed, allowing you to download the forms (Figure 27). You can choose to download the files as a Zip file or merge the files into one document. After selecting your option, click OK.

Figure 27. Assembly Complete dialog box

DOWNLOADING MULTIPLE FORMS
You can download multiple forms from any list in Doc & Form Builder. Select the forms in the list you want to download and click Download Blank Form(s). The Download Blank Form(s) dialog box is displayed (Figure 28). You can choose to download the files as a Zip file or merge the files into one document. After selecting your option, click OK.

Figure 28. Downloading multiple forms