INTRODUCTION TO LEGAL RESEARCH ON WESTLAW

WESTLAW PATRON ACCESS
Getting Started

ACCESSING WESTLAW PATRON ACCESS
Click the Westlaw® Patron Access icon on the computer desktop. A user agreement is displayed. After you read and accept the terms of the agreement, choose I Agree and click Continue. The Westlaw home page is displayed (Figure 1).

CONTENT AND SEARCHING
You have access to all of the Westlaw content included in the library’s subscription. Documents that are not available are marked Out of Plan. At the Westlaw home page, you can use the text box at the top of the page to search for documents or retrieve a document using its citation or name. You can also browse content by clicking the links on the tabs. For assistance using Westlaw, click Help at the bottom of any page to see helpful reference materials and an online learning tutorial.

SIGNING OFF FROM WESTLAW PATRON ACCESS
To end your Westlaw Patron Access research session, click Sign Off at the top of any page.

Figure 1. Westlaw home page
Using the Home Page

Westlaw simplifies your starting point for legal research. At the home page, you can use the text box at the top of the page to find a document by citation or name or search for documents. You can also browse content using the links in the Browse section.

FINDING DOCUMENTS BY CITATION OR NAME

To find a document by citation or name, do one of the following:

• To find a document by citation, type the citation in the text box at the top of the page and click Search. For example, to retrieve the case *Ledbetter v. Goodyear Tire & Rubber Co.*, 127 S. Ct. 2162 (2007), type 127 sct 2162 (Figure 2).

• To find multiple documents by citation, type the citations in the text box separated by semicolons and click Search. For example, type 127 sct 2162; 93 sct 705.

• To find a case by party name, type one or more parties’ names or the case title in the text box and click Search. For example, type roe v. wade.

![Figure 2. Finding a Case by Citation](image-url)
**RESEARCHING A LEGAL ISSUE**

When you run a search on Westlaw, you don't need to select a database. Your search is automatically run across the following 13 core content categories:

- Cases
- Trial Court Orders
- Statutes & Court Rules
- Regulations
- Administrative Decisions & Guidance
- Practical Law
- Secondary Sources
- Forms
- Briefs
- Trial Court Documents
- Jury Verdicts & Settlements
- Proposed & Enacted Legislation
- Proposed & Adopted Regulations

The core content categories that will be most helpful for your research include Cases, Statutes and Court Rules, Regulations, Forms, and Practical Law™. Following are brief descriptions of these categories:

- **Cases** are the written opinions of appellate and lower court judges.

- **Statutes** are laws passed by a state legislature or the United States Congress.

- **Court rules** have the force of law and govern practice and procedure in the various courts. Examples include the Federal Rules of Evidence as well as any local rules that a court issues.

- **Regulations** include state and federal agency regulations such as the Code of Federal Regulations.

- **Forms** are model or sample documents that often have blank spaces that can be filled in by the drafter. Forms can save you hours of time when you are researching areas like family law and probate.

- **Practical Law** provides continuously updated resources that help you get up to speed quickly in unfamiliar areas of law.
To search for documents, follow these steps:

1. Type search terms describing your issue in the text box at the top of the page (Figure 3). If you are familiar with Boolean searching, you can also type a Terms and Connectors query. Westlaw recognizes whichever search format you use.

2. Leave the default jurisdiction or click the arrow to display the Jurisdiction selector. Select up to three jurisdictions and click Save (Figure 4).

3. Click Search.

**SELECTING SPECIFIC CONTENT TO SEARCH**

To select specific content to search, click a tab, such as State Materials, in the Browse section at the home page. Then click a content category, such as Ohio. A corresponding tabbed text box is displayed at the top of the page. Type your search in this text box, change the jurisdiction if necessary, and click Search.

**BROWSING CONTENT**

In addition to running a search, you can use the Browse feature to retrieve documents. Simply click the category links on the tabs in the Browse section. See the “Searching Cases” and “Searching Statutes” sections below for more information.
Viewing a Search Result

RESULT PAGE

After your search is run, an overview of the search result is displayed. Click a content category in the left column to display the result page for that category. For example, click Cases to view the cases in your result (Figure 5).

RESULT PAGE OPTIONS

• By default, the documents are ranked by relevance. To change the default ranking, choose an option from the Sort by drop-down list at the top of the center column.

• Click the View Detail icon ( ) to choose from three levels of detail. Details vary by document type and may include document title and citation, search terms in context, and a document summary.

RELATED DOCUMENTS

When you are viewing the result page for a particular content category such as cases, a list of related documents from the Secondary Sources, Briefs, and Trial Court Documents content categories is displayed in the right column. To view the full text of a related document, click its title.

Figure 5. Cases result page
Narrowing a Search Result

After you select a content category at the result page, you can narrow your search result using filters under Narrow in the left column (Figure 6). To select more than one filter to apply at the same time, first click Select Multiple Filters, then select the filters you want to add and click Apply Filters. To undo all filters you have added, click Undo Filters under Narrow.

SEARCHING WITHIN RESULTS

You can narrow a search result by searching for terms within the result. Type your terms in the Search within results text box under Narrow in the left column and click Search. Both your original search terms and the terms used to narrow your result are highlighted in different colors in the documents. To undo a search within a result, click Undo search within in the left column.

FILTERING SEARCH RESULTS

You can also narrow a search result by selecting other filters under Narrow. Filters vary by document type. For example, the filters available for cases include jurisdiction, date, reported status, topic, judge, attorney, law firm, key number, party, and docket number.

Figure 6. Filters at result page
Browsing Documents in a Search Result

To view a document in your search result, click the document’s title. Each document contains highlighted search terms for easy browsing and links to cited documents.

On the document toolbar for a case, you can do any of the following (Figure 7):

- To view the result list, click Return to list.
- To view the next or previous document in the result, click the Results arrows.
- To view the portions of each document that contain your search terms, click the Search term arrows.
- To jump to a specific portion of a case, click the Go to arrow and choose an option such as Headnotes from the menu.

Figure 7. Caselaw document in a search result

Returning to Prior Research

You can return to your previous work at any time during your research session. Point to History at the top of any page. A list of the five most recent documents you have viewed and searches you have run is displayed. Your history is available until the end of your research session.
Searching Cases

What Is a Case?
Cases are the written opinions of appellate and lower court judges. Appellate courts are courts that have the authority to review decisions of lower courts. Opinions from appellate courts can be crucial to understanding a legal issue because these opinions determine how lower courts decide similar issues in the future. Federal and state appellate court opinions and federal lower court opinions are on Westlaw.

Note that for most state courts, it is unusual for lower or trial court decisions (as opposed to the appellate decisions described above) to be published, either online or in print. This means that even if a trial court decision is in the news because of an unusual ruling or a large award of damages, it may not be on Westlaw.

What Are Editorial Enhancements?
Cases in West reporters feature several editorial enhancements created by our attorney-editors, such as:

• A synopsis, which is a paragraph-length summary of the facts and the main legal issues in a case.

• Headnotes, which are short summaries of each legal issue discussed in the case.

• Topic and Key Numbers. Each headnote is classified under one or more Topics and Key Numbers in the West Key Number System®, which our editors use to index caselaw.
Finding Cases by Citation or Name

To find a case by citation or name, do one of the following:

• To find a case by citation, type the citation in the text box at the top of the page and click Search. For example, type 127 sct 2162.

• To find multiple cases by citation, type the citations, separated by semicolons, in the text box and click Search.

• To find a case by party name, type one or more parties’ names or the case title in the text box, change the jurisdiction if necessary, and click Search (Figure 8). For example, type rumsfeld v. hamdan.

Figure 8. Finding a case by party name

Searching for Cases

To search for cases, follow these steps:

1. Type terms describing your issue in the text box at the top of the page. If you are familiar with Boolean searching, you can also type a Terms and Connectors query. Westlaw recognizes whichever search format you use.

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 to search all core legal content, including cases.
Browsing Cases

In addition to running a search, you can use the Browse feature to retrieve cases. Click the category links on the tabs in the Browse section. You can retrieve cases in several ways from the Browse section:

- Click the All Content tab, then click Cases to display the Cases page, which organizes cases under Federal Cases by Court, Federal Cases by Circuit, Cases by State, Cases – other U.S. Jurisdiction, and Cases by Topic. Click the appropriate links to retrieve the cases you want.

- Click the Federal Materials tab to retrieve U.S. Supreme Court cases or cases from federal courts in a specific circuit or state.

- Click the State Materials tab to view a list of states. Click a state name to retrieve cases from state or federal courts in that state.

When you click a link for a specific court, such as U.S. Supreme Court, a list of the 10 most recent cases from that court is displayed (Figure 9). A corresponding tabbed text box is displayed at the top of the page. You can search all cases from the court by typing a search in this text box and clicking Search.

![Figure 9. List of recent U.S. Supreme Court cases](image-url)
Viewing a Search Result

RESULT PAGE

After your search is run, the result page is displayed (Figure 10). (If an overview of your search result is displayed, click Cases in the left column to view the result page for cases.) The result page lists the citations of cases retrieved by your search and shows your highlighted search terms in context. The result page contains three columns:

• The left column lists the core content categories as well as available filters.
• The center column lists all the cases in your search result.
• The right column lists a sampling of related documents from the following content categories: Secondary Sources, Briefs, and Trial Court Documents.

RESULT PAGE OPTIONS

• By default, cases are ranked by relevance. To change the default ranking, choose an option from the Sort by drop-down list at the top of the center column.
• Click the View Detail icon at the result page to choose from three levels of detail. The type of detail may include the case title and citation, search terms in context, and a case summary.
Narrowing a Search Result

You can narrow your search result using the filters in the left column (Figure 11). To select more than one filter to apply at the same time, first click **Select Multiple Filters**, then select the filters you want to use and click **Apply Filters**. To undo all filters you have added, click **Undo Filters** under **Narrow**.

SEARCHING WITHIN RESULTS

You can narrow a search result by searching for terms within the result. Type your terms in the **Search within results** text box under **Narrow** in the left column and click **Search**. Both your original search terms and the terms used to narrow your result are highlighted in different colors in the cases. To undo a search within a result, click **Undo search within** in the left column.

FILTERING SEARCH RESULTS

You can also narrow a search result by selecting other filters under **Narrow**. Filters available for cases include jurisdiction, date, reported status, topic, judge, attorney, law firm, key number, party, and docket number.

![Figure 11. Filters at cases result page](image-url)
Browsing Cases in a Result

To view a case in your search result, click the case’s title. Each case in a search result contains highlighted search terms for easy browsing and links to cited documents. On the document toolbar for a case, you can do any of the following (Figure 12):

• To view the result list, click Return to list.

• To view the next or previous document in your search result, click the Results arrows.

• To view the portions of each document that contain your search terms, click the Search term arrows.

• To jump to a specific portion of a case, click the Go to arrow, and choose an option such as Headnotes from the menu.

Figure 12. Case
Checking Cases in KeyCite

Use KeyCite®, the citation research service from Thomson Reuters, to help determine whether a case is good law and to retrieve documents that have cited the case. KeyCite covers every case in West’s National Reporter System® and more than 1 million unpublished cases. There are several ways to access KeyCite information:

• While viewing a case with a KeyCite flag, click the flag.

• While viewing any case, click one of the following tabs at the top of the page: Negative Treatment, History, or Citing References.

• Type kc: or keycite: followed by a citation in the text box at the top of the page and click Search. For example, type kc: 93 sct 1817 or keycite: 93 sct 1817.

KEYCITE STATUS FLAGS

If a case has a red or yellow flag, the most negative treatment is displayed next to the flag at the top of the case (Figure 13). Most negative treatment consists of phrases such as Overruled by, Abrogated by, or Distinguished by and includes a link to the underlying document, if available. These flags tell you that you should not rely on the case.

- 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.

Figure 13. Case showing most negative treatment
VIEWING NEGATIVE DIRECT HISTORY AND NEGATIVE CITING REFERENCES

Click the Negative Treatment tab to view negative direct history and negative citing references for a case (Figure 14). Negative citing references are displayed in a table format. The depth of treatment bars in the Depth column indicate the extent to which citing cases discuss the cited case, and the headnote numbers in the Headnotes column indicate which headnotes in the cited case contain the points of law discussed by the citing cases.

Figure 14. Negative Treatment tab

VIEWING HISTORY

Click the History tab to view the direct history of a case and related references. The cases included in the direct history and related references are listed in the left column. Direct history is also displayed in a graphical view in the right column. You can restrict direct history by choosing an option from the View drop-down list.

VIEWING CITING REFERENCES

Click the Citing References tab to view a list of cases, administrative materials, secondary sources, appellate court documents, and other court documents that cite your case. To change the order in which the citing references are displayed, choose a date or depth of treatment option from the Sort By drop-down list on the toolbar. To narrow the list of citing references, you can:

• Type terms in the Search within results text box in the left column.
• Click a document type in the left column, such as Appellate Court Documents. You can further narrow this list by selecting a filter under Narrow in the left column.
Searching Statutes

What Is a Statute?
A statute typically refers to a law passed by a state legislature or the U.S. Congress. State and federal court cases often involve statutory interpretation, and enactment of a statute may well reverse established case law.

FEDERAL STATUTES
After the U.S. Congress passes a bill and the president signs it into law, it is codified, or published in, the United States Code (USC), the official version of federal statutory law. Since 1927, West has published an annotated version of the USC, the United States Code Annotated® (USCA®). Each statute in the USCA is followed by summaries of published court decisions that interpret the statute. These summaries are also called annotations or notes of decisions. The complete USCA is available on Westlaw.

STATE STATUTES
State laws are codified, or published in, the state legislative codes. Statutes from all 50 states and the District of Columbia are available on Westlaw.

Finding Statutes by Citation
To retrieve a statute by citation, type the citation in the text box at the top of the page and click Search. For example, type 29 usca 2614 or cal civ code 56.21.

Searching for Statutes
To search for statutes, follow these steps:
1. Type terms describing your issue in the text box at the top of the page. If you are familiar with Boolean searching, you can also type a Terms and Connectors query. Westlaw recognizes whichever search format you use.
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 to search all core legal content, including statutes.
Retrieving Statutes Using the Table of Contents Service

You can use the category links in the Browse section of the home page to retrieve statutes using the Table of Contents service. The Table of Contents service lets you browse statutes, view a statute in the context of the sections surrounding it, and quickly retrieve related sections.

An easy way to access the Table of Contents service is by clicking the All Content tab, then clicking Statutes and Court Rules to display the Statutes and Court Rules page (Figure 15). Click United States Code Annotated (USCA) to display the table of contents for the United States Code Annotated (USCA) (Figure 16), or click a state name to display the table of contents for that state’s statutes and court rules.

To browse a table of contents, click the links. To retrieve a specific section, click its name.

To run a search, select Search all content, or select Specify content to search and select the check boxes next to the sections, titles, parts, or subparts you want to search. Then type your search in the tabbed text box at the top of the page and click Search.
LINKING TO OTHER TOOLS AND RESOURCES

While viewing a table of contents, you can click links under Tools and Resources in the right column to access other useful materials, including:

- an alphabetical statutes index
- a popular name table

Retrieving Statutes Using an Index

You can use an alphabetical index to retrieve statutory sections on a specific topic. While viewing the table of contents for the USCA or a state’s statutes, click the Index link in the right column. Browse the index by clicking the letters at the top of the page (Figure 17). You can also type a word or phrase in the text box. For example, type adoption and click Search. A list of topics containing the term is displayed (Figure 18). Click a topic to view the relevant sections. To retrieve the full text of a section, click its citation.

Retrieving Statutes Using the Popular Name Table

When you know the popular name of an act, you can use the popular name table to retrieve the statute sections under which the act is codified. While viewing the table of contents for the USCA or a state’s statutes, click the Popular Name Table link in the right column to display the popular name table, which lists the acts in alphabetical order. To see the statutory sections under which an act is codified, click the act’s name or the citation next to the name.
Viewing a Search Result

RESULT PAGE

After your search is run, the result page is displayed (Figure 19). (If an overview of your search result is displayed, click Statutes in the left column to view the result page for statutes.) The result page lists the citations of statutes retrieved by your search and shows your highlighted search terms in context. The result page contains three columns:

- The left column lists the core content categories as well as available filters.
- The center column lists all the statutes in your search result.
- The right column lists a sampling of related documents from the following content categories: Secondary Sources; Briefs; and Trial Court Documents.

RESULT PAGE OPTIONS

- By default, statutes are ranked by relevance. To change the default ranking, choose an option from the Sort by drop-down list at the top of the center column.
- Click the View Detail icon (≡ - ) at the result page to choose from three levels of detail. Details may include the section numbers and names, the major statutory headings, and search terms in context.

Figure 19. Statutes result page
Narrowing a Search Result

You can narrow your search result using the filters in the left column (Figure 20). To select more than one filter to apply at the same time, first click Select Multiple Filters, then select the filters you want to use and click Apply Filters. To undo all filters you have added, click Undo Filters under Narrow.

SEARCHING WITHIN RESULTS

You can narrow a search result by searching for terms within the result. Type your terms in the Search within results text box under Narrow in the left column and click Search. Both your original search terms and the terms used to narrow your result are highlighted in different colors in the statutes. To undo a search within a result, click Undo search within in the left column.

FILTERING SEARCH RESULTS

You can also narrow a search result by selecting other filters under Narrow. Filters available for statutes include jurisdiction, effective date, and statute title.
Browsing Statutes in a Result

To view a statute in your search result, click the statute’s section number or name. Each statute in a search result contains highlighted search terms for easy browsing and links to cited documents. On the document toolbar for a statute, you can do any of the following (Figure 21):

- To view the result list, click Return to list.
- To view the next or previous statute in your search result, click the Results arrows.
- To view the portions of each statute that contain your search terms, click the Search term arrows.
- To view the next and previous sections, even if they were not retrieved by your search, click the arrows to the right and left of the section symbol (§).
- To view the portion of the table of contents containing the statute you are viewing, click Table of Contents.

Figure 21. Statute
VIEWING RELATED MATERIAL

Related material is organized on tabs at the top of the displayed statute (Figure 22).

Click the **Notes of Decisions** tab or click a topic under *Notes of Decisions* in the right column to view notes of decisions, written by West attorney-editors, which summarize points of law from cases that construe or apply the statute.

Click the **Context and Analysis** tab to view links to other related materials such as cross-references, library references, and law review and journal commentaries.

To return to the full text of the statute you were viewing, click the **Document** tab.

![Figure 22. Tabs with related material](image-url)
Checking Statutes in KeyCite

KeyCite information is available for federal statutes and statutes from all 50 states. Use KeyCite to help determine whether a statute is good law and to retrieve documents that cite the statute.

You can access KeyCite information in several ways:

• While viewing a statute with a KeyCite flag, click the flag.

• While viewing any statute, click the History or Citing References tab at the top of the page.

• Type kc: or keycite: followed by a citation in the text box at the top of the page and click Search. For example, type kc: 29 usca 2614 or keycite: 29 usca 2614.

KEYCITE STATUS FLAGS

If a statute has a red or yellow flag, the most negative treatment is displayed next to the flag at the top of the document (Figure 23). Most negative treatment consists of phrases such as Unconstitutional or Preempted or Proposed Legislation and includes a link to the underlying document, if available. These flags tell you that you should not rely on the statute.

A red flag indicates that 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.

Figure 23. Statute showing most negative treatment
VIEWING HISTORY
Click the **History** tab to view history for a statute, which includes the following categories (Figure 24):

- **Graphical Statute**, which helps you track changes to a statute.
- **Validity**, which includes cases affecting the validity of the statute, recent session laws that have amended or repealed the statute, and proposed legislation.
- **Versions**, which includes prior versions of the statute.
- **Editor’s and Revisor’s Notes**, which summarizes legislative changes affecting the section.
- **Bill Drafts**, which includes drafts of bills introduced before a section was enacted into law.
- **Legislative History Materials**, which lists committee reports, testimony, and executive messages relevant to the section.

![Figure 24. History tab for statute](image)

VIEWING CITING REFERENCES
Click the **Citing References** tab to view citing references for the statute, including cases, statutes, regulations, administrative decisions, secondary sources, briefs, trial court documents, and other documents. To change the order in which the citing references are displayed, choose an option from the **Sort By** drop-down list on the toolbar.

To narrow the list of citing references, click a document type in the left column, such as **Cases**. You can further narrow this list by:

- Typing terms in the **Search within results** text box in the left column.
- Selecting a filter under **Narrow** in the left column, such as **Jurisdiction**.
Searching Forms

Westlaw provides access to thousands of forms that you can use when drafting documents in areas such as family law, wills, and bankruptcy.

Accessing Forms

To access forms, click **Forms** on the All Content tab at the home page. The Form Finder page is displayed, which is organized by state, topic, and publication (Figure 25). To search all forms, type your terms in the **Form Finder** text box at the top of the page and click **Search**.

To search forms from a specific state, on a specific topic, or from a specific publication, click the state, topic, or publication name. For example, to view Florida forms, click **Florida**.

![Figure 25. Form Finder page](image)

The Florida Form Finder page is displayed (Figure 26). To search all Florida forms, type your terms in the **Florida Form Finder** text box at the top of the page and click **Search**. For example, to search for forms related to health care directives, type **health care directive** in the text box.

![Figure 26. Florida Form Finder page](image)
Viewing a Search Result

RESULT PAGE

After you run a search, the result page is displayed (Figure 27). The result page lists the citations of documents retrieved by your search and shows your highlighted search terms in context. Available filters are listed in the left column.

Narrowing a Search Result

You can narrow your search result using the filters in the left column. To select more than one filter to apply at the same time, first click Select Multiple Filters, then select the filters you want to use and click Apply Filters. To undo all filters you have added, click Undo Filters under Narrow.

SEARCHING WITHIN RESULTS

You can narrow a search result by searching for terms within the result. Type your terms in the Search within results text box under Narrow in the left column and click Search. Both your original search terms and the terms used to narrow your result are highlighted in different colors in the forms. To undo a search within a result, click Undo search within in the left column.

FILTERING SEARCH RESULTS

You can also narrow a search result by selecting other filters under Narrow. Filters available for forms include jurisdiction, content type, publication name, form type, practice area, and topic.
Browsing Forms in a Result

To view a form in your search result, click its title. Each form in a search result contains highlighted terms for easy browsing (Figure 28). You can print the form and customize it to meet your needs at a later time.

Figure 28. Form
Searching Practical Law

What Is Practical Law?

Practical Law provides legal know-how written by experienced practitioners to give you a better starting point. Practical Law Practice Notes, plain-language discussions of the law as it stands today, help you get up to speed quickly. Our standard documents are party neutral and include in-depth practice notes to provide drafting insights. With Practical Law checklists, you’ll be confident that you’ve considered everything.

PRACTICAL LAW HOME SCREEN

1. On the Westlaw home page, select Practical Law within the All Content section. This will direct you to the home page for Practical Law.

2. To start your search on Practical Law, use the search bar or select from the list of practice areas (Figure 29).

3. Once you select a practice area, browse for resources by choosing a topic.

4. Or, choose the RESOURCE TYPES tab to find content based on the resource type. You can also choose the JURISDICTIONS tab to browse state content.

5. Access RELATED CONTENT to see additional on-point resources handpicked by Practical Law editors.

Searching Practical Law

NOTE: Browsing (rather than searching) by practice area or resource type is the recommended method of finding the most valuable content.

To search Practical Law, follow these steps:

1. Type terms describing your issue in the text box at the top of the page and click Search.

2. Refine your search results using the filters on the left side of the page.

3. Search results are classified by resource type and can be sorted by relevance, date, and title (A-Z).
Browsing Practical Law

To browse Practical Law, follow these steps:

1. Click on a practice area, such as Estate Planning.

2. Click on a topic, such as Wills (Figure 30).

   ![Figure 30. Browsing Practical Law](image)

3. Browse through Resource Types (Figure 31). To view a document of interest, click on the document.

   ![Figure 31. Browsing Practical Law](image)
4. Refine your results using the filters on the left side of the page. To view a document of interest, click on the document (Figure 32). Results are classified by resource type and can be sorted by relevance, date, and title (A-Z).

Figure 32. Practical Law results page and filters

5. Click on the document you wish to view. Drafting Notes throughout the document give you additional understanding and insight for that particular document or clause (Figure 33).

Figure 33. Document
Resources

PRACTICE NOTES

Plain-language discussion of the law as it is today (Figure 34).

Figure 34. Practice Note

STANDARD DOCUMENTS AND CLAUSES

Up-to-date precedents that reflect current law and practice, with integrated practical drafting and negotiating guidance. They can be downloaded for easy editing if the library has email/download capability enabled (Figure 35).

Figure 35. Standard Documents and Clauses
CHECKLISTS

Checklists, timelines, and flowcharts make sure you’ve covered all the bases (Figure 36).

Figure 36. Checklists
Printing Documents

After you have retrieved a search result on Westlaw, you can print one or more documents or a list of documents. You can also save your print requests in the delivery queue until the end of your research session.

Printing Documents

To print a document or a list of documents, complete these steps:

1. Select the document(s) you want to print.

2. Click the Delivery Options (arrow) and choose Print from the drop-down list.

3. A dialog box is displayed, which includes two or more of the following tabs, depending on the documents you choose to print (Figure 37). The options available on each tab will also change depending on what you choose to print.
   - Basics tab. Choose to print a list of documents or individual documents.
   - Layout and Limits tab. Use the check boxes and drop-down lists to choose layout elements such as dual-column format for cases or an expanded margins for notes.
   - Content to Append tab. Select the check boxes for the content you want to append to the document from the KeyCite Lists and Other Related Information sections.

4. Click Print. A Preparing for Print dialog box is displayed. To continue your research and print your documents at a later time, click Minimize and Continue Researching. Your request will be added to the delivery queue.

Figure 37. Print Documents dialog box
Emailing Documents

After you have retrieved a search result on Westlaw, you can email one or more documents or a list of documents.

Emailing Documents

To email a document or a list of documents, complete these steps:

1. Select the document(s) you want to email.

2. Click the Delivery Options (arrow) and choose Email from the drop-down list (Figure 38).

Patron Access subscriber (i.e., library) must have email/download functionality enabled for the user to email or download a document.
3. A dialog box is displayed, which includes two or more of the following tabs, depending on the documents you choose to email (Figure 39). The options available on each tab will also change depending on what you choose to email.

- **Recipients tab.** Enter an email address and select a format from the drop-down list. You can modify the prepopulated Subject field, enter in a note about the document(s) and select option(s) on what is delivered.

- **Layout and Limits tab.** Use the check boxes and drop-down lists to choose layout elements such as dual-column format for cases or an expanded margins for notes.

- **Content to Append tab.** Select the check boxes for the content you want to append to the document from the **KeyCite Lists** and **Other Related Information** sections.

![Figure 39. Email Documents dialog box](image)

4. Click **Email**. A Preparing for Email dialog box is displayed followed by a Ready for Email dialog box indicating the email has been sent.

**Note:** There is a 5 MB limit for emailed documents. If the document you are emailing exceeds 5 MB, a download link will be emailed instead.

Patron Access subscriber (i.e., library) must have email/download functionality enabled for the user to email or download a document.
Downloading Documents

After you have retrieved a search result on Westlaw, you can download one or more documents or a list of documents. You can also save your download requests in the delivery queue until the end of your research session.

Downloading Documents

To download a document or a list of documents, complete these steps:

1. Select the document(s) you want to download.

2. Click the Delivery Options ( ) arrow and choose Download from the drop-down list (Figure 40).

Figure 40. Choosing Download in Delivery Options

Patron Access subscriber (i.e., library) must have email/download functionality enabled for the user to email or download a document.
3. A dialog box is displayed, which includes two or more of the following tabs, depending on the documents you choose to download (Figure 41). The options available on each tab will also change depending on what you choose to download:

- **Basics tab.** Choose to download a list of documents or individual documents.
- **Layout and Limits tab.** Use the check boxes and drop-down lists to choose layout elements such as dual-column format for cases or an expanded margins for notes.
- **Content to Append tab.** Select the check boxes for the content you want to append to the document from the **KeyCite Lists** and **Other Related Information** sections.

![Download Documents dialog box](image)

*Figure 41. Download Documents dialog box*

4. Click **Download**. A Preparing for Download dialog box is displayed. To continue your research and download your documents at a later time, click **Minimize and Continue Researching**. Your request will be added to the delivery queue.

Patron Access subscriber (i.e., library) must have email/download functionality enabled for the user to email or download a document.
Using the Delivery Queue

Print and Download requests are saved in the delivery queue in the lower-right corner of the page (Figure 42).

- To display the items in the delivery queue, click the View delivery queue icon.
- To deliver an item in the delivery queue, click Print or Download next to the item.

Figure 42. Printing and downloading items in the delivery queue
Thomson Reuters Customer Service

WESTLAW ASSISTANCE
For assistance with Westlaw Patron Access, consult a librarian or click Help at the bottom of any Westlaw page.

ACCESSIBILITY INFORMATION
For information on the Thomson Reuters Westlaw™ accessibility policy, visit legalsolutions.thomsonreuters.com/law-products/about/legal-notices/accessibility.

WESTLAW TRAINING
For information about Web-based training, visit training.westlaw.com/patronaccesswestlawnext.

REFERENCE MATERIALS
For free reference materials, visit legalsolutions.thomsonreuters.com/law-products/westlaw-legal-research/patron-access.

ABOUT THIS GUIDE
In this guide, the graphics and step-by-step instructions are based on accessing Westlaw via the Internet. Because of the evolving nature of Internet technology, there may be recent changes to the Westlaw interface and functionality that are not reflected in this documentation.

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