**USING BUSINESS FORMS ONLINE**

**Note:** This session is a continuation of the Business Drafting Class Orientation (B. Goldberg), held in the Law Library on August 31, 2012. The first part of the orientation consisted of a walk-through tour of selected legal and business form sources in print. All of the sources covered in the Library tour are included on the other two handouts for this session: “Legal Forms” and “New York Forms.”

The online session focuses on two of these sources—West’s McKinney’s Forms (on Westlaw) and Rabkin and Johnson, Current Legal Forms, with Tax Analysis (on Lexis).

**II**. USING BUSINESS FORMS ONLINE (in Lower Level Computer Lab)

Log on to the network; go to Law Library main page (Current Students—Law Library), under “Research,” click on Westlaw/TWEN; then click on Lexis/Web Courses, and minimize that sign in page for now.

 **Sign on to Westlaw; click WestlawNext tab**

**WestlawNext:**

* **Using West’s McKinney’s Forms**
* **Must Find:** same form: **form for selling a controlling share interest in a close corporation**
* Click on WestlawNext
* If you already knew that your form was “**West’s McKinney’s Forms BCL 7:6**”, you could just type that in search box, and go directly to the form (Jurisdiction—can leave on All State & Federal, or ANY jurisdiction would work—this is really like a citation)
* If you locating the form online for the first time-- on menu page, click on “Forms”
* **Under “Forms by State,”** click New York
* **Under “Forms by Publication,”** click West’s McKinney’s Forms
* Click “**Business Corporation Law**”
* You can BROWSE, until you come to Chapter 7, Close Corporations, and find 7:6
* Or, you can search using your terms in the search box—USE QUOTES: "close corporation" sale "controlling share interest" (searching with no quotes, it is #5 in list)
* When you find the form, can use **references** or **correlation table (two separate things)** (re-numbering in 2008)
* Show correlation table for 7:06 and 7:6; related references, including forms
* Can still open the Table of Contents of McKinney’s Forms from the document page, if you want to browse and get another form
* Then you want to work with the form: **WestlawNext has “Easy edit**” to download it and open it in Word version, formatted as a legal document, that is “fillable”.
* Also, by **clicking on the “envelope” icon** in the upper right corner, you can save the Westlaw html version to a **WLNext folder.** By clicking the printer icon, to **print it**. Using the **arrow** next to the printer icon, you can choose to **email it** in various formats: Word, as a PDF, or in Word Perfect. Or, you can **download it** in these formats, or send it to a Kindle email address.

**MORE:** Under Browse, All Content: Go to Forms—Forms by Publication—try “Business Transactions Solution”

\*\*On Westlaw Classic, you could use the database identifier given in the handouts and use the “Search for a database” box to go directly to McKinney’s forms. If you don’t find it on WestlawNext, try Westlaw Classic.

**Sign on to Lexis—at home page, then select (under Research Now!): Lexis.com**

(To get there, at Law Library main page**, (**Current Students—Law Library) under “Research,” click on Lexis/Web Courses)

2. Using **Rabkin and Johnson, Current Legal Forms, with Tax Analysis** (page 2 on Legal Forms handout) (Lexis database):

* **Must find: Form for Lease of Heavy Equipment with an Option to Renew**
* Click on **Lexis.com**
* At the Menu page—lists all the sources, or databases in Lexis.com
* Click “**Find a Source**” tab—gray
* **Some type**: Rabkin Johnson; **Others type**: Current Legal Forms (higher up in the list with author’s name, but either will work)
* First or second item in results list (Rabkin & Johnson, Current Legal Forms with Tax Analysis)—Click on it (not the “Index”)
* Click on “**i” link**—how up-to-date is this database? (August 2012)
* Shows the Table of Contents view—**Change** the Search button to “Table of Contents”—we want to search only the table of contents for now
* Type in box: **equipment and lease**
* Can you find a good complete lease or form for what we want?
* Locate in results: **Form 4A.18**—Lease of Heavy Equipment—Renewal Option—No Passage of Title (a “complete” lease form)
* **Click on** Form 4A.18—Scroll down
* Note that there is explanatory/introductory material before you get to the form
* Scroll down to the Form
* There is no “easy edit” feature on Lexis, but you can use the **“Copy with cite”** (on top of page, center, under bold black header, blue link) **feature** to copy the entire form or a section of the form into your word processor.

--**First**, Select (highlight) a section of the form, or all of the form; **then click** on the “**Copy with cite” link** at top of the page; **then** select the text (include the hyperlink) within the box, and **paste the text**, with the citation, into your word processor. Clicking the hyperlink (if checked off), once pasted into your word processor, will open the entire document/form in a new window.

\*\* Lexis Advance—Not recommended at present time; they are still adding materials. Lexis.com recommended for Lexis forms. However, Rabkin & Johnson is on Lexis Advance. For those of you who have used Lexis Advance—must sign on separately, then use blue “Browse Sources tab”, search the sources for “Current Legal Forms”, go into Rabkin Johnson, and search the Table of Contents with terms only (Google Search), such as: heavy equipment lease. No “easy edit” feature—but can copy to a clip board or a folder.

 Rev8/30/2012, by Toni L. Aiello