WESTLAW NEXT
BOOT CAMP
A Comprehensive Deep Dive into WestlawNext
Getting to WestlawNext

Follow these steps to access WestlawNext®:

2. Type your username and password in the OnePass Username and OnePass Password boxes and click Sign On.
3. Click WestlawNext on the top menu bar.
4. Your WestlawNext session opens in a new window (see page 2).

PART I: AN OVERVIEW OF WESTLAW NEXT

Getting to WestlawNext

WestlawNext Home Page

Finding Documents by Citation

Choosing a Database

Searching Favorite Databases
WestlawNext Home Page

Whenever you start a WestlawNext research session, you start your research from the WestlawNext home page. At the home page, you can retrieve a document by citation or a case by party name, 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 section.

PART I: AN OVERVIEW OF WESTLAW NEXT

Getting to WestlawNext
WestlawNext Home Page
Finding Documents by Citation
Choosing a Database
Searching Favorite Databases

1. **Search Box** – Find whatever you’re looking for using the search box powered by WestSearch®.
2. **Jurisdiction Selector** – Choose up to three jurisdictions before running a search.
3. **Client ID** – Allows attorneys to track the time they spend on research projects. (Students typically do not use this feature.)
4. **Folders** – Access recently used folders from a list or click the link to view and organize all of your folders.
5. **History** – Access recent documents and searches from the list or click the link to access your research history for up to a year.
6. **Browse** – Navigate to content from thousands of databases before searching.
7. **Project Folder** – Add documents and snippets of text to your project folder from almost any page.
8. **Favorites** – Add content pages to your Favorites for easy access from the home page.
9. **Frequently Used Items** – A checkbox list of content you visit most often.
10. **Edit Home Page** – Choose to show or hide select home page features.
11. **Preferences, My Contacts, Getting Started**
    - Set preferences for searching, delivery, citations, and more
    - Create groups with My Contacts
    - Watch the Getting Started video
12. **Help** – Access video tutorials and documentation in the Help Center.
13. **Live Chat** – Get live research help Monday through Friday, 7:00 am-midnight CT.
Finding Documents by Citation

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 (e.g., 349 US 294) in the search box and click Search. To retrieve multiple documents by citation, type the citations, separated by semicolons, in the search box and click Search.

To retrieve a case by party name, type one or more parties’ names (e.g., Plessy v. Ferguson) in the search box, change the jurisdiction if necessary, and click Search.

WestSearch Search Types | Examples
--- | ---
Find by Citation: | type in 349 US 294
Find by party name: | Plessy v. Ferguson
Find Multiple Citations: | 304 US 64; 26 USC 9706; 39 usfrev967

Add Multiple Documents to Folder:
1. Check Select All Items.
2. Click Save to Folder.
3. Create new folder, “Section A – Open Memo”.
4. Create sub-folder, “Original Sources”.

PART I: AN OVERVIEW OF WESTLAW NEXT

Getting to WestlawNext
WestlawNext Home Page
Finding Documents by Citation
Choosing a Database
Searching Favorite Databases
Choosing a Database

Browse to your desired database:

1. For example, under the State Materials tab, select Tennessee from the list of jurisdictions and Tennessee Supreme Court Cases from the list of state and federal content for Tennessee.
2. You also can start typing the first letters of your jurisdiction or content. WestlawNext will suggest options.
3. Or, in the All Content tab, choose Cases and select the jurisdiction and court.

PART I: AN OVERVIEW OF WESTLAW NEXT

Getting to WestlawNext
WestlawNext Home Page
Finding Documents by Citation
Choosing a Database
Searching Favorite Databases

Add Databases to Your Favorites:

Save time with future searches by adding databases to your Favorites.

1. When you're in the database, click the yellow Add to Favorites star next to the database's name.
2. Click Create new group and name the group.
3. Once added, the content will be listed in Favorites every time you log on to WestlawNext.
Searching Favorite Databases

Click on Favorites on the home page and:

1. Enter key words for your issue or topic (e.g., criminal negligence)
   - Check the databases you want to search
   - Click Search

2. On the results page, you can filter your results by Favorites databases. The overview lists the number of items in each Favorite.

PART I: AN OVERVIEW OF WESTLAW NEXT

Getting to WestlawNext
WestlawNext Home Page
Finding Documents by Citation
Choosing a Database
Searching Favorite Databases
Searching with Boolean Terms and Connectors

The WestlawNext search box allows for both Plain Language and Boolean (Terms and Connectors) searching.

1. **Automatic Detection** – When you enter Boolean syntax in the Search box, WestSearch automatically identifies your desired search method. All terms and connectors except "&" and "or" automatically trigger a Terms and Connectors search; if you wish, you can change this in Settings.

2. **Advanced Command** – Typing `advanced:` or `adv:` triggers a Boolean search, even without the use of a Boolean connector.

3. **Advanced Search Template** – Use the fields in Advanced Search to build a Boolean Terms and Connectors query.

**PART II: SEARCHING ON WESTLAW NEXT**

Searching with Boolean Terms and Connectors

Plain Language Searching

Key Number System and Headnotes

Keeping Your Research Organized
Plain Language Searching

Find what you’re looking for using simple descriptive terms.

1. Simply type the legal issue you’re researching into the search box:
   Example: freedom of information act [Jurisdiction: Minnesota].

2. You can filter your results by the different content categories.

3. Sort the result list by relevance, date, most cited, or most used.

---

Key Feature: WestSearch – The WestlawNext search box allows for both plain language searching and Terms and Connectors searching. With both, your results will have the benefit of WestSearch, the innovative search algorithm available only on WestlawNext. WestSearch:

- Leverages more than 100 years of editorial analysis of the law, including the West Key Number System®, KeyCite®, and thousands of secondary sources

- Emulates the best practices of experienced researchers

- Produces the best search results possible using only simple descriptive terms

---

PART II: SEARCHING ON WESTLAW NEXT

Searching with Boolean Terms and Connectors

Plain Language Searching

Key Number System and Headnotes

Keeping Your Research Organized
Key Number System and Headnotes

Our exclusive Key Number System is the most comprehensive and widely used indexing system for caselaw materials. It is an important part of the WestSearch algorithm, which makes WestlawNext such a powerful research tool. Our attorney-editors create headnotes classified to the topics and key numbers of the Key Number System.

If you have a relevant topic or key number or you know what legal terms and concepts courts have used when discussing your issue, you can conduct a comprehensive search in the system for published opinions discussing points of law touching on your issue.

WHAT ARE THE WEST EDITORIAL ENHANCEMENTS?

1. Synopsis – A summary of the case written by our attorney-editors.
2. Headnotes – Points of law as applied in the case.
3. Key Numbers – Click on a key number to find cases similar to the one you’re researching.

PART II: SEARCHING ON WESTLAW NEXT

Searching with Boolean Terms and Connectors
Plain Language Searching
Key Number System and Headnotes
Keeping Your Research Organized

Tip: You can get quick access to the complete West Key Number System via the Tools tab on the home page.
Keeping Your Research Organized

1. If you select text by holding down your left mouse button, you have a few options:

   - **Save to a Folder** - You can save a direct quote ("snippet") into a folder for future viewing.
   - **Add a Note** - You can add personal comments that you can read in the future.
   - **Highlight** - You can highlight selected text that you can view in the future.
   - **Copy with Reference** - You can copy with the citation. Note that "Standard" is currently formatted with *The Bluebook*, 19th edition.

---

PART II: SEARCHING ON WESTLAW NEXT

Searching with Boolean Terms and Connectors

Plain Language Searching

Key Number System and Headnotes

Keeping Your Research Organized
KeyCite for Cases

KeyCite maps the citation network among all federal and state cases in the National Reporter System®, as well as one million+ unpublished cases, federal and state statutes, and thousands of secondary-source publications. WestSearch analyzes the connections among documents, makes your search results more inclusive, and lists the most relevant documents first.

- **Red flag** – Warns that a case is no longer good law for at least one of the points of law it contains.
- **Yellow flag** – Warns that a case has some negative history but has not been reversed or overruled.

### PART III: ADVANCED SEARCHING ON WESTLAW NEXT

#### KeyCite for Cases

- KeyCite for Statutes
- Code of Federal Regulations
- Annotations & Folder Sharing
- History
- Getting Help on WestlawNext

#### WestlawNext

1. **KeyCite** continually updates the status of saved documents in your Folders.
2. **Filings** – See all the filings in the case.
3. **Negative Treatment** – When applicable, a description and a link for the most negative treatment is available at the top of the document.
4. **History** – A graphical view of the procedural history of the case. (see page 11)
5. **Citing References** – Displays a list of cases, administrative materials, secondary sources, briefs, and other documents that cite your case. (see page 12)
History – A graphical view of the procedural history of the case. A good teaching aid for class.

NOTE: KeyCite will highlight your case in yellow within the procedural chain.

PART III: ADVANCED SEARCHING ON WESTLAW NEXT

KeyCite for Cases
KeyCite for Statutes
Code of Federal Regulations
Annotations & Folder Sharing
History
Getting Help on WestlawNext
Citing References – Displays a list of cases, administrative materials, secondary sources, briefs, and other documents that cite your case.

- Click the Citing References tab to view documents that cite your case.
- Click an option in the Sort By list on the toolbar to change the order in which the citing references are displayed.
- Click a document type (e.g., Cases) to further define this list. (Narrow your search even more by selecting a filter under Narrow in the left column, such as Jurisdiction or Headnote Topics.)
- Type terms in the Search within results box.
- Select what level of Depth of Treatment you prefer.

**PART III: ADVANCED SEARCHING ON WESTLAW NEXT**

**KeyCite for Cases**
**KeyCite for Statutes**
Code of Federal Regulations
Annotations & Folder Sharing
History
Getting Help on WestlawNext

**KeyCite Depth of Treatment Bars**
- **Examined** – The citing case, administrative decision, or brief contains substantial discussion of the cited case, usually more than a printed page of text.
- **Discussed** – The citing case, administrative decision, or brief contains an extended discussion of the cited case, usually more than a paragraph but less than a printed page of text.
- **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 minor reference to the cited case, usually in a string citation.
KeyCite for Statutes

- **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.
- **Yellow flag** – Indicates that the statute has been renumbered or transferred by a recent session law; that an uncodified session law of 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.

PART III: ADVANCED SEARCHING ON WESTLAW NEXT

KeyCite for Cases

- Code of Federal Regulations
- Annotations & Folder Sharing
- History
- Getting Help on WestlawNext

**WESTLAW NEXT BOOT CAMP**

1. **Statute Citations** are hyperlinked within documents.
2. **Notes of Decisions** are provided from cases that have significantly interpreted or applied the statute.
3. **History** gives you a graphical history of your statute.
Code of Federal Regulations (CFR)

Three ways to access CFR:

1. Click on Regulations in the All Content tab.
3. Use the search box.

CFR Index – Researching CFR is not as straightforward as researching statutes. To assist you in working efficiently, WestlawNext provides a CFR Index instead of a standard Table of Contents.

PART III: ADVANCED SEARCHING ON WESTLAW NEXT

KeyCite for Cases
KeyCite for Statutes
Code of Federal Regulations
Annotations & Folder Sharing
History
Getting Help on WestlawNext

Tip: You can add specific sources, such as CFR Index references, to your Favorites.
Annotations and Folder Sharing

Documents that you add to your folders are saved on WestlawNext for as long as you choose. Click Folders at the top of any page to display the Folders page.

Options – Copy, move, rename, delete, export, export to Amazon® Kindle®, or share your folders.

Share Folder – Share entire folders with others at your school.

Add a Description – Point to a document in your folder and click the pencil icon to provide a description of the document.

Search Within Results – Search for documents and snippets within your folders.

Folder Sharing

1. Click on Options.
2. Click on Share.
3. Enter the name(s) of the person(s) to share the folder with.
4. Indicate the person's role and privileges.

PART III: ADVANCED SEARCHING ON WESTLAW NEXT

KeyCite for Cases
KeyCite for Statutes
Code of Federal Regulations
Annotations & Folder Sharing
History
Getting Help on WestlawNext
History

History lets you return to previous research quickly and easily. Your research history on WestlawNext is automatically saved for one year, including all document views and searches.

1. Hover over History to see your recent documents and searches, or click the History menu to view and search full history.
2. Select the timeframe for your search.
3. Use Search within results or filters to refine your topic.

PART III: ADVANCED SEARCHING ON WESTLAW NEXT

KeyCite for Cases
KeyCite for Statutes
Code of Federal Regulations
Annotations & Folder Sharing

History

Getting Help on WestlawNext

Tip: Clicking History is the quickest way to pick up where you left off during your previous WestlawNext session.
Getting Help on WestlawNext

For assistance when you need it, go to lawschool.westlaw.com

1. Academic Account Manager
2. Thomson Reuters Student Representatives
3. Live Help Monday through Friday, 7:00 am-midnight CT
4. Faculty Resources

CALL 1-800-WESTLAW
(1-800-937-8529)
Customer Technical Support & TWEN® Assistance

Use Help on WestlawNext
There’s a link at the bottom of every WestlawNext page.

Watch Video Tutorials
Visit training.westlaw.com
CUSTOM PAGES ON WESTLAW NEXT
Create your own research experience.

On WestlawNext, you can now create your own Custom Pages personalized to your specific research needs. Build a page designed around the way you think and work, and stay in complete control of your research process. It’s what you’d expect from a complete research system designed by legal professionals for legal professionals.

- Customize your pages with frequently searched content
- Add convenient tools such as Find a Citation, KeyCite® a Citation, Folders, and Favorites
- Send a Custom Page to a colleague down the hall or in another law firm
- Make a Custom Page your start page on WestlawNext
- Create as many pages as you need – one for your state or practice area

Visit westlawnext.com

For more information please contact: SUSANA CAMARGO POHL, 646-334-3451
susanacamargo-pohl@thomsonreuters.com

© 2014 Thomson Reuters • 5/19/14