

THOMSON REUTERS

**WESTLAW™**

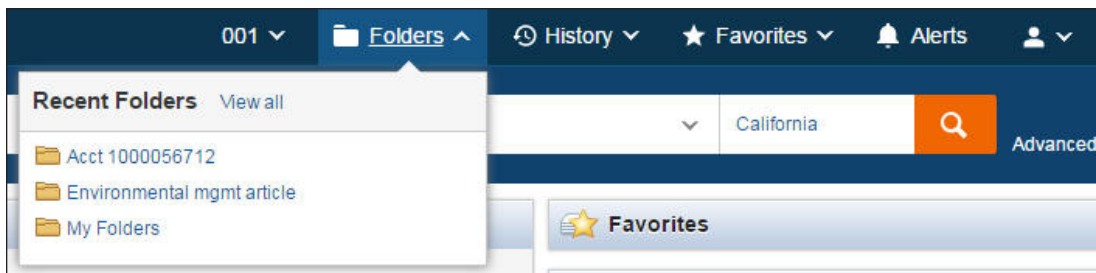
## Using Folders to Organize Your Westlaw Research

When someone else has already done the research you're about to do, that's the biggest time-saver of all. Folder sharing on Westlaw® enables you to tap into previous research across department and organizational boundaries like never before. You get instant access to shared documents from any computer, tablet, or mobile phone. No more reinventing the wheel.

Organize and manage your research by storing documents and snippets of text in folders that are easily accessible from anywhere on Westlaw. Plus, take advantage of new folder features like Research Report, which assembles a research report for you, and Folder Analysis, which suggests additional cases and statutes you have not looked at yet.

### Accessing Folders

Folders can be accessed by clicking on the **Folders** link at the top of any page. Or, hover your mouse over the **Folders** link to show links to recent folders.



### Saving Documents and Text in a Folder

#### SAVING DOCUMENTS FROM A RESULT LIST

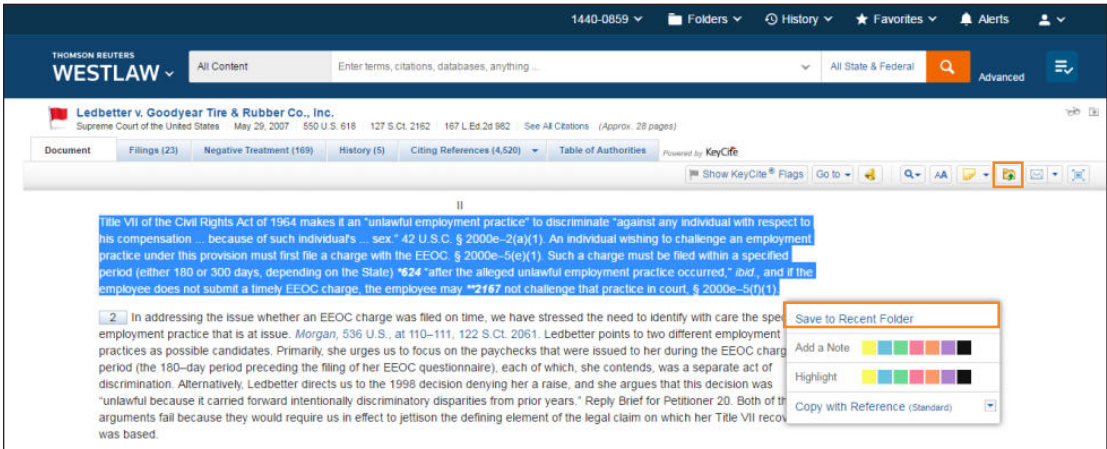
To save documents from a result list, select the check boxes next to the documents you want to save and click the **Save to Folder** (📁) icon. Select the folder in which you want to save the documents and click **Save**. If the documents are successfully saved in the folder, a confirmation message is displayed.

**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.

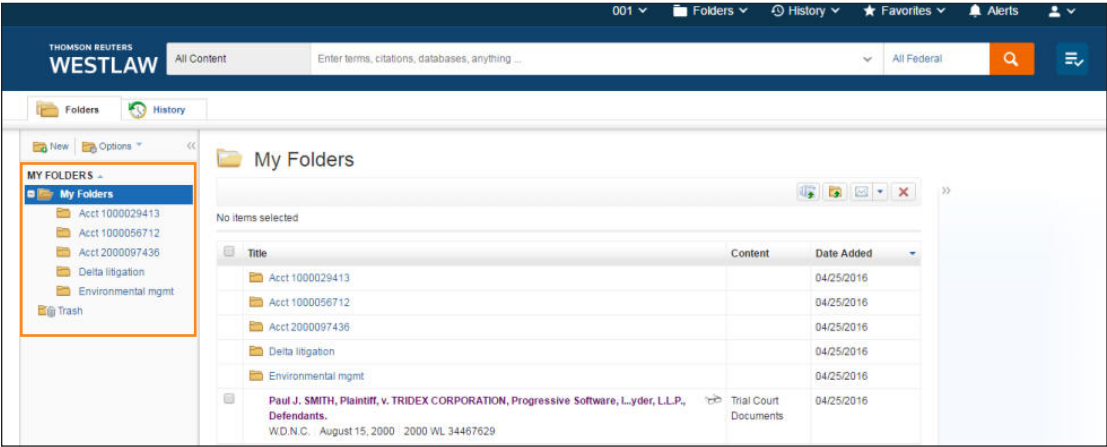
**SAVING SELECTED TEXT**

To save selected document text to a recent folder, select the text you want to save and choose **Save to Recent Folder** from the drop-down menu, and then select the folder to save the text to. A message is displayed confirming that the text has been saved.



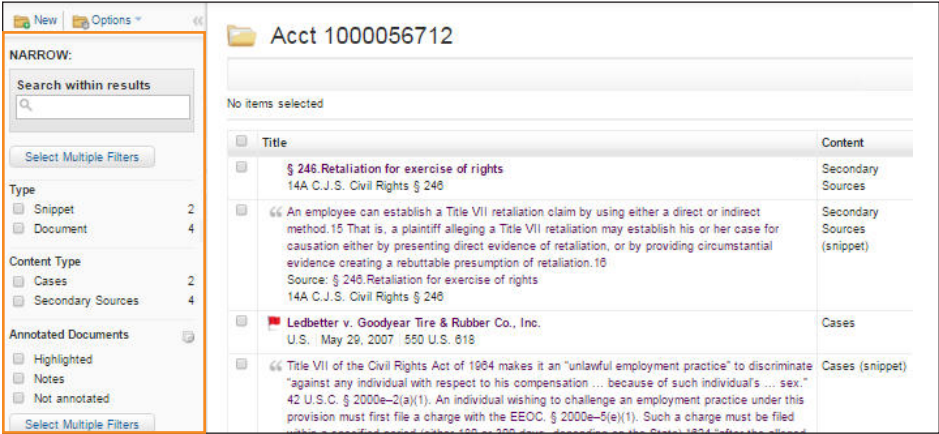
**Viewing Saved Documents and Text**

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



**FILTERING BY ITEM TYPE OR CONTENT TYPE**

When you are viewing the items in a folder at the Folders page, you can filter the items by item type, content type, or annotated notes (items that have highlighted portions, have notes, or are not annotated). Under NARROW in the left column, select the appropriate check box under *Type*, *Content Type*, or *Annotated Documents*. The list will filter automatically. Click **Select Multiple Filters** to apply multiple filters without automatically narrowing the list. You can also search the documents in a folder for particular terms. Type the terms in the *Search within results* field and click **Search**.



**Managing Folders**

At the Folders page, you can click **New** to create a new folder or click **Options** to perform one of the following tasks:

- copy or move a folder
- rename a folder
- delete a folder
- export documents from a folder or to Amazon Kindle

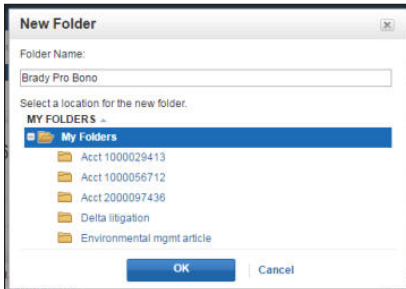


### CREATING A NEW FOLDER

At the Folders page, click **New** to display the New Folder window. Type a name for the new folder in the *Folder Name* field, 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 window. Type a name for the new folder in the *Folder Name* field, select a location for the folder, and click **OK**.

To add a note to a folder, click its title in the left column so it appears on the right, hover your mouse over the folder title, and click the **Add Note** (📝) icon. A field will appear. Type your note, and then click **Save**. To edit the note, hover your mouse over the note and click **Edit**. Make the appropriate changes, and then click **Save**.



### MOVING OR COPYING A FOLDER

To move or copy a folder to a different folder, select the folder you want to move or copy. Then, complete these steps:

1. Choose **Move** or **Copy** from the Options menu. The Move Folder or Copy Folder window is displayed.
2. Select the folder to which you want to move or copy the folder.
3. Click **Move** or **Copy**. A message is displayed indicating that the folder has been moved or copied.

### Moving or Copying an Item to Another Folder

To move or copy an item from one folder to another, first select the items, and then click the **Save to Folder** button. The Save Items To window appears. Select the destination folder, and then click the **Copy** button to copy the items to that location, or click the **Move** button to move the items to that location.

### RENAMING A FOLDER

To rename a folder, select the folder you want to rename and choose **Rename** from the Options menu. The Rename Folder window is displayed. Type the new name for the folder in the *Folder Name* field and click **OK**.

### DELETING A FOLDER

To delete a folder, select the folder you want to delete and choose **Delete** from the Options menu. The Delete Folder window is displayed. Click **OK** to delete the folder. The primary folder, which is the folder that is present when you first use Westlaw, cannot be deleted. The default name for the primary folder is “[Your Name]’s Research.”

**Note:** All items in the folder, including subfolders, are deleted when you delete a folder.

### Deleting an Item in a Folder

To delete a document or snippet, click the folder you want to delete items from. Then, select the check boxes next to the items you want to delete and click the **Delete** icon.

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## EXPORTING DOCUMENTS FROM A FOLDER

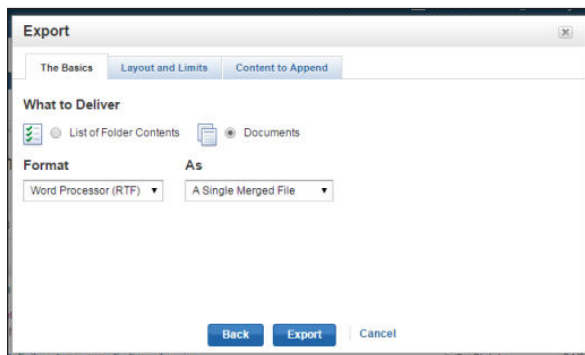
To export documents from a folder to your computer, complete the following steps:

1. At the Folders page, choose **Export** from the Options menu. The Export window is displayed.
2. Select the check boxes next to the folders from which you want to export documents and click **Next**.
3. Choose one of the following options from the What to Deliver section in the Export window:
  - *List of Folder Contents* to download a list of the documents in the folders
  - *Documents* to download the full text of the documents in the folders
  - *Documents and My Annotations* to download the full text of the documents plus any annotations you made to the documents.
4. Choose a format from the *Format* drop-down list.
5. If you choose *Documents* in the What to Deliver section, choose *A Single Merged File* or *Multiple Files (zip)* from the *As* drop-down list.
6. Click the Layout and Limits tab, if available, and select the check boxes for the elements you want to include in the documents, e.g., *West Headnotes*.
7. Click the Content to Append tab, if available, and select the check boxes for the content you want to append to the documents, e.g., *List of all Negative Treatment*.
8. Click **Export**. When the Ready to Download window is displayed, click **Download**. Then click **Open** or **Save**.

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

**Note:** To learn how to share your folders with coworkers, see the “Sharing Folders on Westlaw” quick reference guide available at [legalsolutions.com/westlaw-support](http://legalsolutions.com/westlaw-support)

Additionally, the **Delivery Method** button in the toolbar on the right allows you to email, print, or download selected items. Using this button, files can be downloaded to your computer, Dropbox, Kindle, or Case Notebook.



### LOOKING FOR MORE INFORMATION?

Westlaw is available on the Web at [westlaw.com](http://westlaw.com).

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

For free reference materials, visit [legalsolutions.com/westlaw-support](http://legalsolutions.com/westlaw-support).

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