

Introduction to Westlaw Precision

Participant Materials

Course Description

Introduction to Westlaw Precision is designed to ensure that users of this new legal research platform understand how to accomplish common tasks. This CLE is appropriate for all audiences—no familiarity with prior versions of Westlaw or other research workflows required. Discover how Westlaw Precision can help you be more confident in your results, faster.

Course Agenda

This CLE will cover the following:

- Orientation to a modern legal research platform
 - Searching
 - Browsing
 - Type-Ahead
- Introduction to legal editorial work
 - Principles
 - Key Number System
 - Annotations
- Introduction to Precision Research
 - Scope
 - New editorial work
 - Demonstration
- Reviewing results with efficiency
- Understanding your case as a jumping-off point
 - More Like This
 - KeyCite
 - KeyCite Cited With
 - KeyCite Overruled in Part
 - Outline Builder
- Quick Check
- Visualizing your research history
- How to save and share your research

Course Materials

Orientation to a Modern Legal Research Platform

Although every accredited law school has access to Westlaw, it's not unheard of for students to graduate having conducted their legal research on the open web, or having their cases and statutes provided as part of a "closed universe" project packet similar to the MPT on the bar exam. So, we will begin with a short introduction of the Westlaw Precision home page including general layout and basic navigation.

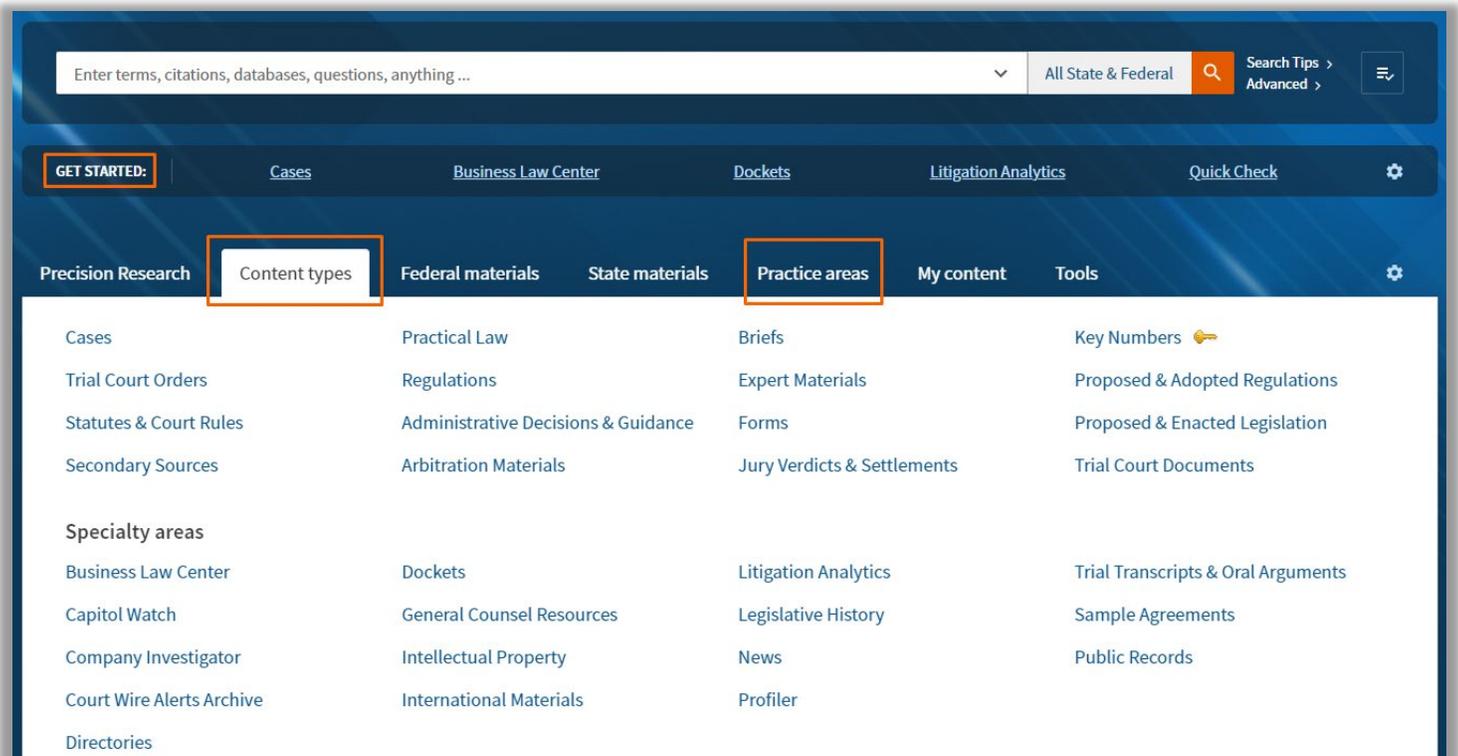
Searching:

- One of the most prominent features on the home page is the bar at the top, which does far more than simply search.
- Users can click on the **Search Tips** link to better understand how to construct plain language or Boolean searches, as well as how to use related features and commands (**Thesaurus** and **FIND**, respectively).
- The jurisdictional selector is immediately to the right of where you enter text, with the search button just to the right of that.



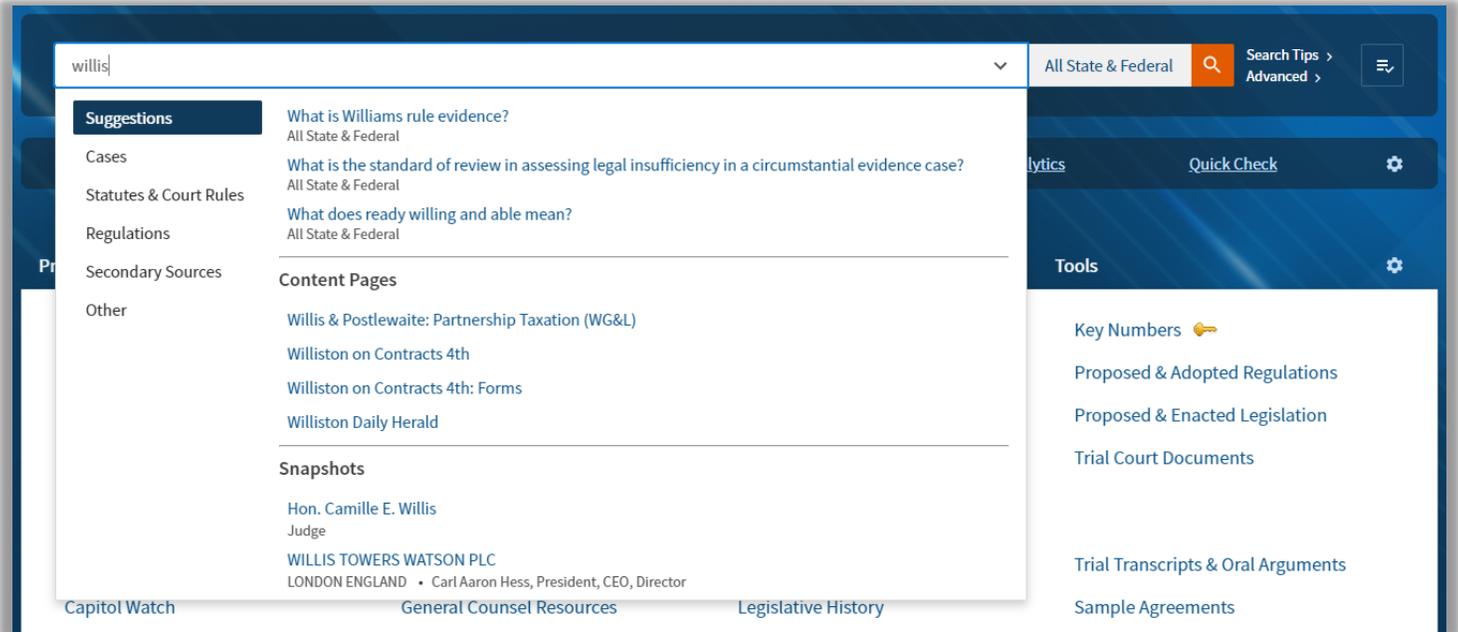
Browsing:

- Most content can be searched from the home page.
- Sometimes, it can be a benefit to narrow before running a search to increase the relevance of the results.
- Alternatively, it's often possible to browse from the home page all the way to the target document without a search at all, especially with tools like the Popular Name Table or Statutes Index.
- The most common method of browsing is by Content type, but there are other methods including the **GET STARTED** shortcuts and by **Practice area**.
- Users must browse into any **Specialty areas** before running a search (e.g., **Dockets**).



Type-Ahead:

- Flexible feature allowing users to locate:
 - Cases, Statutes, and other documents (e.g., **Dukes v. Wal-Mart**)
 - Search suggestions (e.g., **Can a court take judicial notice of a docket?**)
 - Content pages (e.g., **Colorado State Dockets**)
 - Tools (e.g., **USCA Popular Name Table**)
 - Profiles of judges, experts, and other professionals
- We recommend you type slowly and watch what appears in the dropdown.



Introduction to Legal Editorial Work

Now that you've seen the home screen and learned the basics of navigation, it's time to discuss what makes a case different on Westlaw than anywhere else. The answer to that comes down to the integration of 150 years of legal editorial work. This section will serve as a bridge between a case as practitioners might have found it on paper in a courthouse basement circa 1870 (or today on the web) and the new editorial work we're doing with Westlaw Precision.

Principles:

- The United States looks to previously decided opinions as both persuasive and, occasionally, mandatory authority.
- Traditionally, the focus has been on appellate case law because other documents—attorney filings, orders on interim motions, treatises, administrative decisions—have been of limited or no precedential value.
- Appellate case law was bound in books, severed from other documents in the same action (much less other matters).
- Statutes and later-decided cases can affect the validity of specific points of law in a decision.
- We connect all these documents together so you don't have to, and so you can find what you need.

Key Number System:

- The Key Number System began in 1897, organizing decisions by topic.
- Additionally, attorney editors summarized individual propositions of law into single-sentence Headnotes.
- This work is still at the core of how we connect documents, highlight at-risk propositions of law, determine relevance, and enable Artificial Intelligence.

- Demonstration:
 - Navigate to **Content types** and click on [Key Numbers](#).
 - Browse the taxonomy, then return to the top search bar (Headnotes) and enter: **antitrust no private action gun-jumping**
All State & Federal
 - Review the results list, including taxonomy and Headnotes.
 - Click into [In re Old Carco LLC](#)
 - Taxonomy on the right.
 - **Cases that cite this headnote.**
 - KeyCite tabs along the top of the page (e.g., **Negative Treatment**).
 - KeyCite icon is a button
 - Review the various flags and warnings here

Annotations:

- Our editors also use these Headnotes to curate the most relevant cases that interpret sections of a statute, which are called Annotations or, interchangeably, Notes of Decisions.
- Click on [15 U.S.C.A. § 18a\(g\)](#), which is linked in Headnote 35.
- The Notes of Decisions tab is one of the KeyCite tools on statutes, accessible at the top of the document.
 - Note that each entry is categorized (e.g., **Construction with other laws**) and has the associated Headnote, a link to the decision, and a link to the Key Number system.
 - Also note that our Editors narrowed the 284 cases that cite to this section down to the 13 annotations we see here (as of this writing) because many decisions provide no meaningful analysis or are duplicative of other landmark cases.

§ 18a. Premerger notification and waiting period
15 USCA § 18a - United States Code Annotated - Title 15. Commerce and Trade - Effective: December 21, 2000 (Approx. 5 pages)

Document **Notes of Decisions (13)** History (463) Citing References (5,431) Context & Analysis (121) Powered by KeyCite

Notes of Decisions (13) Sort: Procedural Order

Filter Hide

Select multiple

Restore previous filters

Date +

Jurisdiction +

Key Number +

Table of Contents Hide

- 1. Construction with other laws
- 2. Power of Federal Trade Commission
- 3. Injunctions
- 4.5. Disclosure
- 5. Consummation of merger, disclosure
- 6. Operating leases

Select all - No items selected

1. Construction with other laws

Proposed judgment for civil penalties entered pursuant to parties' settlement of government's Hart-Scott-Rodino Act (HSR Act) claims was a "consent judgment" under plain meaning of Tunney Act, such that government was required to comply with Tunney Act procedures before proposed judgment could be approved; while government claimed that its interpretation of Tunney Act as applying only to consent agreements involving equitable relief was supported by 40 years of consistent practice, there was no basis to conclude that government's practices altered the commonly understood meaning of the words Congress actually used. **United States v. Blavatnik, D.D.C.2016, 168 F.Supp.3d 36. Federal Civil Procedure** 2397.2

2. Power of Federal Trade Commission

Federal Trade Commission (FTC) did not act arbitrarily or capriciously in adopting final rule modifying its reportable asset acquisition regulations to clarify that, even if patent holders retained limited manufacturing rights or co-rights, transfers of patent rights within pharmaceutical industry constituted reportable asset acquisitions under Hart-Scott-Rodino Antitrust Improvements Act if all commercially significant rights were transferred, despite industry's contention that there was no basis for singling it out; FTC explained that it adopted rule to address problem that was specific only to pharmaceutical industry, there was nothing to indicate that industry representatives were denied information to which they were entitled to participate in rulemaking proceeding, and industry produced nothing to rebut FTC's findings. **Pharmaceutical Research and Mfrs. of America v. F.T.C., C.A.D.C.2015, 790 F.3d 198, 416 U.S.App.D.C. 129, 114 U.S.P.Q.2d 1985. Antitrust and Trade Regulation** 305; **Antitrust and Trade Regulation** 951

Federal Trade Commission's denial of plaintiff corporation's request for early termination of waiting period with respect to its proposed acquisition of up to 49.9 percent of target company's stock exceeded Commission's authority and jurisdiction, where early termination was denied on ground unrelated to competitive considerations, Commission lacked authority not to grant early termination on ground that "special business reason" had not been shown, Commission was not, by its action, remaining neutral and Commission applied its policy of prohibiting early terminations in contested acquisitions in discriminatory fashion. **Heublein, Inc. v. F. T. C., D.C.Conn.1982, 539 F.Supp. 123. Antitrust And Trade Regulation** 951

Introduction to Precision Research

Our earlier editorial work set the stage for researchers to locate relevant material more quickly. One example was the ability, first, to quickly find the statute of limitations for and elements of particular causes of action simply by slow-typing their query. This functionality was helpful for new attorneys in particular. Next, we added the ability to ask-and-answer tens of thousands of questions, training our A.I. model using Headnotes and going far beyond Definitions and Elements. But even this fell short of what the most sophisticated researchers were asking for—the ability to precisely locate decisions “on all fours” with the right cause of action, legal issue, outcome, facts, and party identity. We addressed these requests with additional editorial enhancements.

Scope:

- We have committed to transparency, and so scope information is readily available on the home page.
- For select topics, Westlaw attorney editors have tagged and classified new attributes in cases from 2010 to present along with select older, leading cases.
- Topics:
 - Antitrust
 - Arbitration
 - California State Criminal Discovery and Evidence
 - Commercial Law
 - Copyrights
 - Corporate and Business Law
 - Employment Law
 - Federal Civil Procedure
 - Federal Class Actions
 - Federal Criminal Discovery and Evidence
 - Federal Discovery and Evidence
 - Federal Remedies
 - Government Contracts
 - Insurance
 - Medical Malpractice
 - New York State Criminal Discovery and Evidence
 - Open Records and Meetings
 - Patents
 - Personal Injury
 - Products Liability
 - Real Estate
 - Securities Law
 - State Civil Procedure
 - State Discovery and Evidence
 - State Remedies
 - Trade Secrets
 - Trademarks
 - White Collar Crime
- Notes on topical coverage:
 - Some of these topics are substantive such as Antitrust or Securities
 - Some of these topics are procedural, are of general applicability, and affect many substantive areas of law such as Civil Procedure or Evidence

New editorial work:

- Precision Attributes:
 - Legal issue and outcome
 - The issue being decided upon by the court in the case
 - Example: Personal jurisdiction > Sufficient Contacts for Due Process
 - Fact pattern
 - Descriptions of common recurring scenarios
 - Example: Failure to deliver goods
 - Material facts
 - Short, factual statements the court relied upon in reaching its decision
 - Example: Material transported from construction site to quarry did not move out of state
 - Cause of action
 - Broad legal claims based in common law or statute
 - Example: Wrongful termination
 - Motion type and outcome
 - Underlying motion in the case (i.e., procedural posture)
 - Example: Motion for summary judgment as opposed to a motion to dismiss

- Party type
 - Categories of case participants
 - Example: Manufacturer
 - Industry type
 - Classification of the parties by the type of business they're in.
 - Example: Insurance
 - Governing law
 - An act, statute, constitutional provision, or rule that is relevant to the court's determination of a legal issue.
 - Example: Uniform Commercial Code.
 - Area of law
 - Substantive or procedural areas (see **Scope**, supra)
 - Example: Antitrust or Federal Civil Procedure
- Explanations are available in the product:

Precision Search
Find and combine Precision Attributes below to search for cases specifically relevant to your matter.

Search all Search by attribute

Search for Precision Research attributes Area of law ⓘ

Learn more about:

- Legal issue & outcome
 - The power of fact patterns
 - Clarify using causes of action
 - Related causes of action
 - Motion type & outcome
 - Governing law
 - Industry type
 - Filtering by party type
 - Material facts
 - Area of law

LEGAL ISSUE AND OUTCOME

Use Precision Research to search thousands of identified legal issues and quickly find outcomes for your specific legal question.

Legal issues are the questions resolved by the court:

- Whether a claim was pled with particularity
- Whether there was clear intent not to perform on a contract

Legal outcomes provide the result of the legal issues:

- Insufficiently Pled/Sufficiently Pled
- Found/Not Found

Legal Issue & Outcome

Pleading

- Particularity Requirement } Legal Issue
- Sufficiently Pled } Outcome

Anticipatory Repudiation or Breach

- Clear Intent not to Perform } Legal Issue
- Found } Outcome

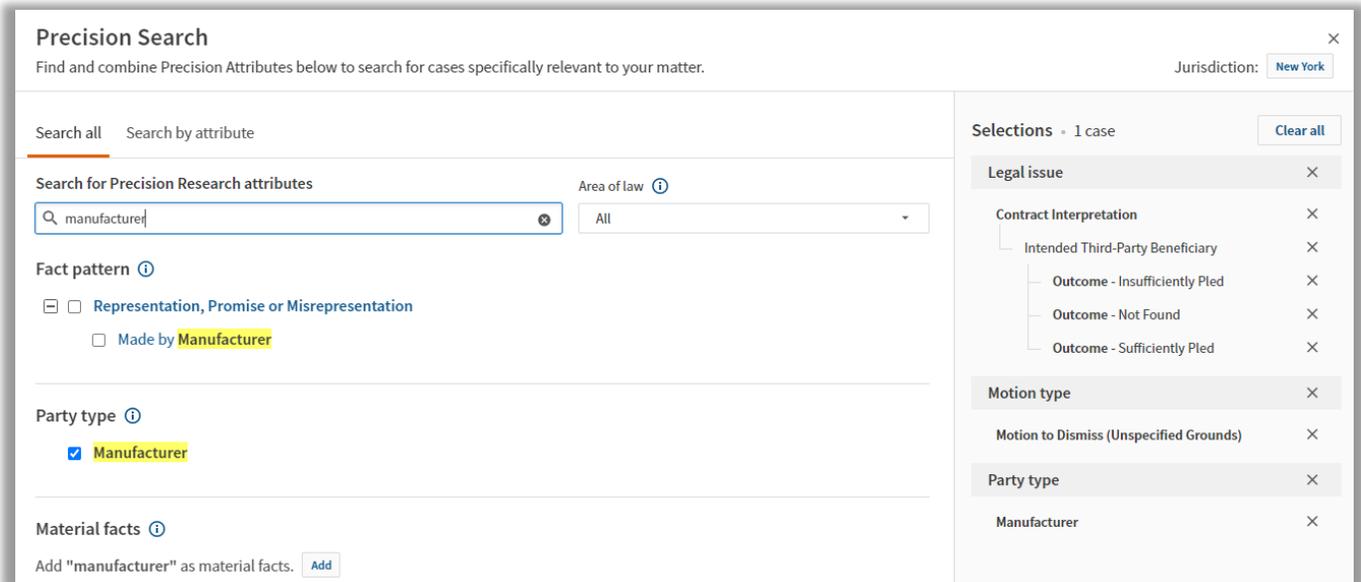
- These attributes are tagged by trained Attorney Editors.
 - If we think of the Key Number System as a taxonomy of legal topics, then we've essentially created nine new taxonomies and classified cases going back over a decade with these new attributes.
 - Fundamentally, someone must read the case.
 - Judges might express opposite outcomes similarly. [Compare Steshenko v. Gaynard, No. 13-CV-03400-LHK, 2015 WL 1503651, at *3 \(N.D. Cal. Apr. 1, 2015\), aff'd sub nom. Steshenko v. Albee, 691 F. App'x 869 \(9th Cir. 2017\)](#) (“[T]he Court declined to exercise supplemental jurisdiction over Plaintiff's remaining state law claims and thus granted Defendants' motion to dismiss Plaintiff's state law claims.”) [with Castillo v. Deutsche Bank Nat. Tr. Co., No. 2:13-CV-00036-DAE, 2014 WL 279675, at *3 \(W.D. Tex. Jan. 23, 2014\)](#) (“[T]he Court, therefore, declines to grant Defendant's Motion to Dismiss on the basis that it was not a

'consumer debt.'").

- The variability of life and variability of expression make searching the actual text of the reported decisions very complicated.

Demonstration:

- Typical advanced legal research question:
 - Need a case
 - Contractual interpretation
 - Third-party beneficiary
 - Motion to dismiss that was granted by the trial court and upheld on appeal
 - Involving a manufacturer
 - In New York state court
- This type of scenario goes beyond what has been possible without running a search for language in the document but, just for example, the manufacturer may never be referred to as such—they may only be referred to as *plaintiff* or *petitioner* or even by the name of the company, which are either too generic or too specific to be covered in the terms themselves.
- However, we can find a document matching all these criteria using Precision Research:



Precision Search
Find and combine Precision Attributes below to search for cases specifically relevant to your matter. Jurisdiction: **New York**

Search all | Search by attribute

Search for Precision Research attributes: Area of law: **All**

Fact pattern:
 Representation, Promise or Misrepresentation
 Made by **Manufacturer**

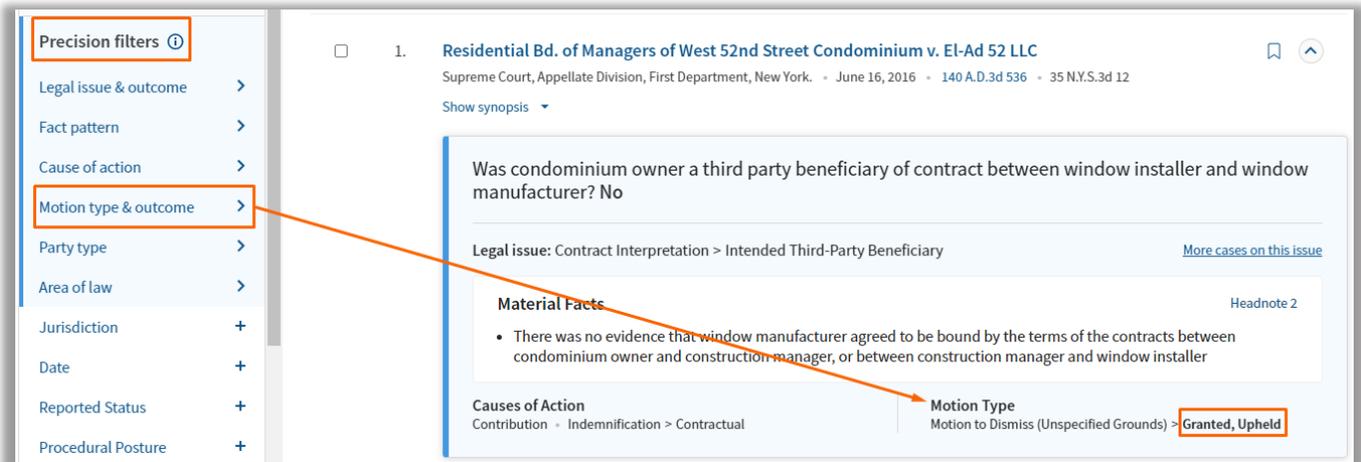
Party type:
 Manufacturer

Material facts: Add "manufacturer" as material facts. **Add**

Selections - 1 case **Clear all**

- Legal issue
 - Contract Interpretation
 - Intended Third-Party Beneficiary
 - Outcome - Insufficiently Pled
 - Outcome - Not Found
 - Outcome - Sufficiently Pled
- Motion type
 - Motion to Dismiss (Unspecified Grounds)
- Party type
 - Manufacturer

- Our results list looks very familiar, with two major changes:
 - New **Precision filters** in the left-hand margin
 - New Browse Box in the list, with components roughly mapping to the Precision Attributes and summarizing key information



Precision filters

- Legal issue & outcome
- Fact pattern
- Cause of action
- Motion type & outcome**
- Party type
- Area of law
- Jurisdiction
- Date
- Reported Status
- Procedural Posture

1. **Residential Bd. of Managers of West 52nd Street Condominium v. El-Ad 52 LLC**
Supreme Court, Appellate Division, First Department, New York. • June 16, 2016 • 140 A.D.3d 536 • 35 N.Y.S.3d 12

Show synopsis

Was condominium owner a third party beneficiary of contract between window installer and window manufacturer? **No**

Legal issue: Contract Interpretation > Intended Third-Party Beneficiary [More cases on this issue](#)

Material Facts Headnote 2

- There was no evidence that window manufacturer agreed to be bound by the terms of the contracts between condominium owner and construction manager, or between construction manager and window installer

Causes of Action: Contribution - Indemnification > Contractual

Motion Type: Motion to Dismiss (Unspecified Grounds) > **Granted, Upheld**

- You can start with a Precision Search from the home page, or you can run a plain language or Boolean search as you usually would.
 - If there are editorially enhanced results, then the **Precision filters** will be present
 - If a result is editorially enhanced, the Browse Box will be present
 - If there is a Headnote we believe answers an identifiable question in your query, that Headnote will be highlighted in the results list—this feature is known as Best Headnote

The screenshot shows a search interface for legal cases. The search query is "antitrust no private action gun-jumping". The results are filtered to "Cases (46)". The first result is "In re Old Carco LLC", a case from the United States Bankruptcy Court, S.D. New York, dated June 19, 2009, with citation 406 B.R. 180 and 2009 WL 1708813. The case is highlighted with a blue box, and its headnote is displayed in a separate box. The headnote text is: "There is no private right of action for gun-jumping violation under provision of Hart-Scott-Rodino Act addressing statutory waiting period for mergers. Hart-Scott-Rodino Antitrust Improvements Act of 1976, § 201(g), 15 U.S.C.A. § 18a(g)." Below the headnote, there are snippets of text from the case, with "private right of action" and "gun-jumping" highlighted in yellow.

Reviewing Results with Efficiency

Once you've run your search, it's time to review the results. Traditionally, researchers would open results—often in new tabs—place them in folders or deliver their results. While some research tasks can be completed quickly (e.g., "Pull the case at 1 F.3d. 1 and email me a copy with any negative treatment"), many tasks require iterative searching. The researcher incorporates or removes terms they're seeing in earlier results to refine the approach over time. Sometimes, what they read sparks new questions or avenues. Often, they know that their goal to "find everything" is nearing the end when they begin seeing the same results over-and-over again. But nobody wants their session to time-out over lunch or during an IT security-instigated restart, or spend valuable time reading a case only to realize they'd rejected it hours ago. New tools assist this iterative process.

- Imagine a new scenario where you're representing a client business with offices in California and New York and they want to review decisions on terminating at will employees.
- If you're reviewing the first result and find it isn't relevant to your research (e.g., you don't need anything about the accounting code) then you can hide the details of the result using the  arrow on the right.
 - This does not hide the case entirely; the title, court, date, and citation are still visible
 - This result will remain minimized until the session ends or the **Client ID** is changed
 - When starting a new session with fresh eyes, you may wish to review this result more fully
 - When switching to a new client, the research needs/goals will change
- If, instead, the result is highly relevant and you wish to save that result to folder/deliver later while continuing to review the results list, you can mark the case using the **Add to Keep List** ribbon 
 - The Keep List is durable across sessions and Client IDs so users don't need to remember those details to retrieve a result they intended to review later
 - The list is always accessible from Tools at the top of Westlaw 

The screenshot shows the Thomson Reuters Westlaw Precision interface. At the top, there's a navigation bar with 'THOMSON REUTERS WESTLAW PRECISION' and various utility links like 'CLE', 'History', 'Folders', 'My links', 'Notifications', and 'Sign out'. A search bar contains 'All content' and 'Enter terms, citations, databases, questions, anything ...'. The location is set to 'CA, NY'. On the left, a sidebar shows 'Content types: Cases (11)' and 'Precision filters' including 'Legal issue & outcome', 'Fact pattern', 'Cause of action', 'Motion type & outcome', 'Party type', and 'Area of law'. The main content area displays 'Search results are based on 1 selected Precision attribute. Edit Precision Search' with the legal issue 'At Will Employment > Termination'. Below this, it shows 'Cases (11)' and 'Additional Relevant WestSearch™ Cases (10)'. Two cases are listed: 1. **Sabetay v. Sterling Drug, Inc.** (Court of Appeals of New York, March 26, 1987, 69 N.Y.2d 329, 506 N.E.2d 919) and 2. **Oliner v. Sovereign Bank** (Supreme Court, Appellate Division, Second Department, New York, December 24, 2014, 123 A.D.3d 1041, 999 N.Y.S.2d 856). A highlighted section for the second case asks 'Was termination arbitrary and capricious? No' and lists the legal issue 'At Will Employment > Termination' with a link to 'More cases on this issue'.

Understanding Your Case as a Jumping-Off Point

Finding a single decision “on all fours” is fantastic but using that to locate all the relevant authority you may need (or your opponent may use) is even better. Pivot quickly from a single decision to highly relevant authority utilizing new tools.

More Like This:

- Click into [Oliner v. Sovereign Bank, 123 A.D.3d 1041, 999 N.Y.S.2d 856 \(2014\)](#).
- Click the **More Like This** tab.
- Explore the options to pivot around different Precision Attributes.
 - We started with 11 Cases
 - Clicking on **Causes of action** then **Wrongful Termination** previews **1416 cases** in **All State & Federal** (at this time)
- This is different than using the Precision Filters because it can return new cases, rather than a subset of the initial query, and can be initiated from any case with Precision Attributes.

KeyCite:

- KeyCite Cited With
 - Click onto the **Cited With** tab.
 - This is a complementary tool to our existing KeyCite tools such as the Table of Authorities and Citing References tabs.
 - Table of Authorities is a list of all documents that the target document *cites to*.

- KeyCite Overruled in Part
 - Practitioners often believe that a red flag means “stop.” This is unfortunate, because it technically means: “no longer good for at least one point of law.” Most cases on Westlaw have many points of law (just look at how many Headnotes a case can have), and so most of those points are usually still valid. Today, the red-striped flag allows users to immediately see the points of law that have been identified as being invalid and get immediately to the overruling authority. This gives them the awareness of and confidence to use the valid points of law.
 - Click into [Popescu v. Apple Inc., 1 Cal. App. 5th 39, 204 Cal. Rptr. 3d 302 \(2016\)](#).
 - Use navigational arrows to see overruled portion
 - Click on flag to read overruling authority
 - Click on that language to go directly there for additional context (optional)

Outline Builder:

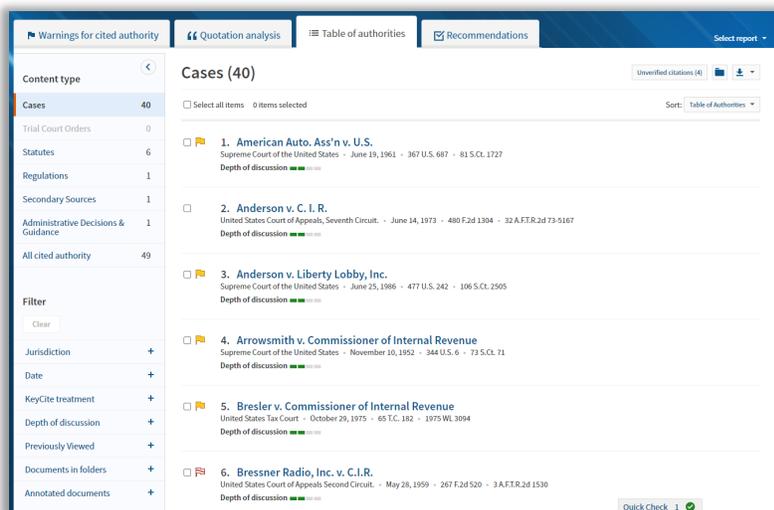
- Stay in the research “zone” and start drafting at the same time, in the same place, with Outline Builder. You can open it from the Tools menu or simply the sidebar of a document. Create argument headings, add notes, and drag-and-drop citations or quotations (still with formatted citations) directly into the outline. Download in Word when you’re done or even run it through Quick Check to ensure your research is complete.
- [Click on Tools then on Outline Builder](#)
 - Click **Create outline**
 - Create an argument heading, note, etc.
 - Navigate to a case, then drag the case name (or a quote) into the Outline
 - Show **Submit to Quick Check** button
 - Show download button (to Word, to continue drafting)

Quick Check

Researchers do not always need to run a search. Often, they have a document to start from. Now, you no longer need argument headings or citations to get started—use a pleading, email, newsletter, administrative guidance, and more to quickly locate relevant authority.

Quick Check:

- If you have a document full of authorities, you can locate any that are on Westlaw simply by uploading the document to Quick Check (**Table of authorities**).



- This has the added benefits of:
 - Checking for flags (**Warnings for cited authority**)
 - Comparing quotations against Westlaw (**Quotation analysis**)

- Generating recommendations of additional, relevant authorities for review (**Recommendations**)
- You can also check a document without arguments or authorities
 - Examples include pleadings, emails, or drafts
 - Select up to three jurisdictions in which to locate relevant authority and receive suggestions

Jurisdiction 0 jurisdictions selected. Select up to 3. ×

⚠ Quick Check was unable to find citations matching to authority on Westlaw in the uploaded document. Please select up to three jurisdictions to continue the analysis.

<p><input type="checkbox"/> All States</p> <ul style="list-style-type: none"> <input type="checkbox"/> Alabama <input type="checkbox"/> Alaska <input type="checkbox"/> Arizona <input type="checkbox"/> Arkansas <input type="checkbox"/> California <input type="checkbox"/> Colorado <input type="checkbox"/> Connecticut <input type="checkbox"/> Delaware <input type="checkbox"/> D.C. <input type="checkbox"/> Florida <input type="checkbox"/> Georgia <input type="checkbox"/> Hawaii <input type="checkbox"/> Idaho 	<ul style="list-style-type: none"> <input type="checkbox"/> Illinois <input type="checkbox"/> Indiana <input type="checkbox"/> Iowa <input type="checkbox"/> Kansas <input type="checkbox"/> Kentucky <input type="checkbox"/> Louisiana <input type="checkbox"/> Maine <input type="checkbox"/> Maryland <input type="checkbox"/> Massachusetts <input type="checkbox"/> Michigan <input type="checkbox"/> Minnesota <input type="checkbox"/> Mississippi <input type="checkbox"/> Missouri 	<ul style="list-style-type: none"> <input type="checkbox"/> Montana <input type="checkbox"/> Nebraska <input type="checkbox"/> Nevada <input type="checkbox"/> New Hampshire <input type="checkbox"/> New Jersey <input type="checkbox"/> New Mexico <input type="checkbox"/> New York <input type="checkbox"/> North Carolina <input type="checkbox"/> North Dakota <input type="checkbox"/> Ohio <input type="checkbox"/> Oklahoma <input type="checkbox"/> Oregon <input type="checkbox"/> Pennsylvania
<ul style="list-style-type: none"> <input type="checkbox"/> Rhode Island <input type="checkbox"/> South Carolina <input type="checkbox"/> South Dakota <input type="checkbox"/> Tennessee <input type="checkbox"/> Texas <input type="checkbox"/> Utah <input type="checkbox"/> Vermont <input type="checkbox"/> Virginia <input type="checkbox"/> Washington <input type="checkbox"/> West Virginia <input type="checkbox"/> Wisconsin <input type="checkbox"/> Wyoming 	<ul style="list-style-type: none"> <input type="checkbox"/> Tribal <input type="checkbox"/> Guam <input type="checkbox"/> Puerto Rico <input type="checkbox"/> Virgin Islands <input type="checkbox"/> Northern Mariana Islands 	<p><input type="checkbox"/> All Federal</p> <p>By Court</p> <ul style="list-style-type: none"> <input type="checkbox"/> United States Supreme Court <input type="checkbox"/> Federal Courts of Appeals <input type="checkbox"/> Federal District Courts <input type="checkbox"/> Bankruptcy Courts <input type="checkbox"/> Tax Court <input type="checkbox"/> Military Courts <p>By Circuit ?</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Circuit <input type="checkbox"/> 2nd Circuit <input type="checkbox"/> 3rd Circuit <input type="checkbox"/> 4th Circuit <input type="checkbox"/> 5th Circuit <input type="checkbox"/> 6th Circuit <input type="checkbox"/> 7th Circuit <input type="checkbox"/> 8th Circuit <input type="checkbox"/> 9th Circuit <input type="checkbox"/> 10th Circuit <input type="checkbox"/> 11th Circuit <input type="checkbox"/> D.C. Circuit <input type="checkbox"/> Federal Circuit

Include related federal ?

Visualizing Your Research History

Now that we've run a search, applied some filters, and clicked some tabs we can see how it all appears in History. Traditionally this has been a simple list of searches run and documents viewed with timestamps and Client IDs. It can be difficult to determine how long you worked on a search, viewed a document, or where you found success compared to where you discovered a dead-end.

Click on **History**. A quick glance shows the standard, reverse chronological view. Filters and search within functionality are on the left. However, at the top you can switch to **Graphical View**. This represents your research history in a visual way, anchored by your searches and document views. High Activity will be emphasized while dead ends will be obvious. We even show you how long you spent at each point on your path and the order you accessed everything.

Demonstration:

- View history and toggle to **Graphical View**
- Explain the "anchor event"
 - Search
 - FIND
 - Quick Check
- Preferences
- Navigation
- High Activity and other indicators

History: Graphical view

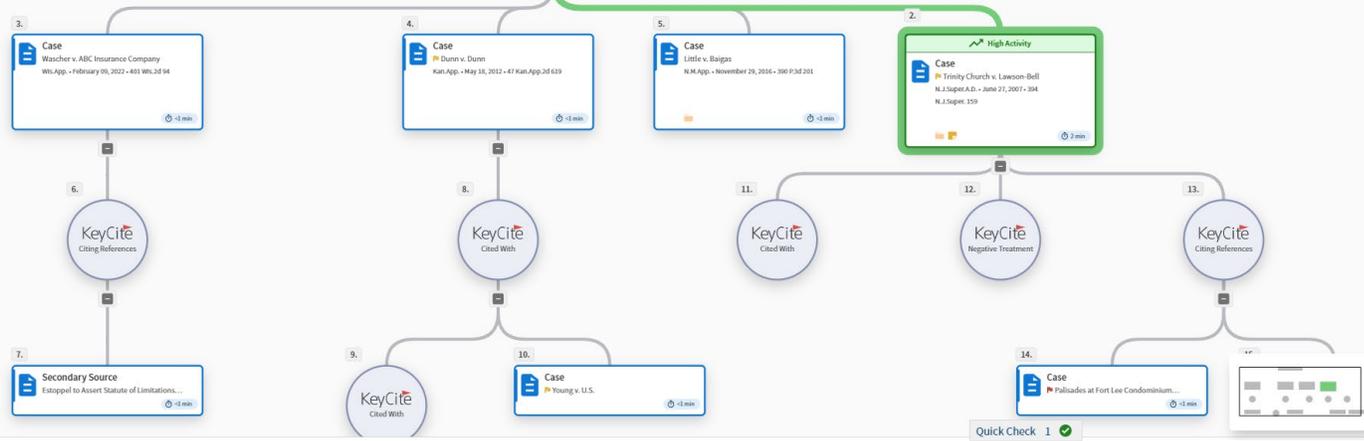
October 5, 2022 - 10:32 AM - 10:37 AM - 4 min 15 events

Search: adv: (statute period action /3 limit(repose) tack! toll! accru! estop! /p contract!
All State & Federal - TRAINING

Exit fullscreen

adv: (statute period action /3 limit(repose) tack! toll! accru! estop! /p contract!
Cases - All State & Federal

Rotate Reset Collapse all



How to Save and Share Your Research

Rarely is a single person working on a matter by themselves from start to finish. More, even “quick” dispositions like a motion to dismiss in federal court take over 100 days on average from the time they’re filed until they’re ruled upon. Folders allow users to save their research indefinitely, organize it in a way that makes sense to them, the documents will always be up-to-date (e.g., if a yellow flag turns red it will appear that way in the folder), and folders can be shared easily within the firm and beyond.

Demonstrate:

- Open the **Keep List** and folder (then delete) a result in a new subfolder you create.
- Run a related search and folder several more results.
- Click into a new content type then into a specific document and folder it from there.
- Show the Folder Analysis sidebar if you’ve triggered it.

The screenshot displays the Thomson Reuters Westlaw Precision interface. The top navigation bar includes 'CLE', 'History', 'Folders', 'My links', and 'Notifications'. A search bar is present with the text 'Enter terms, citations, databases, questions, anything ...' and a dropdown menu set to 'NY (State & Fed.)'. The left sidebar shows 'Matters' and 'My folders', with 'Admi Settle Mats' selected. The main content area shows a list of documents under the heading 'Admi Settle Mats'. The documents are:

Title	Content	Date added
<input type="checkbox"/> PROTECTING THE CONFIDENTIALITY OF SETTLEMENT NEGOTIATIONS HSTLJ - 39 Hastings L.J. 955	Secondary Sources	11/07/2022
<input type="checkbox"/> § 408:1 Compromise offers and negotiations 3 Handbook of Fed. Evid. § 408:1 (9th ed.)	Secondary Sources	11/07/2022
<input type="checkbox"/> Rule 408. Compromise Offers and Negotiations FRE Rule 408	Statutes & Court Rules	11/07/2022
<input type="checkbox"/> Pierce v. F.R. Tripler & Co. C.A.2 (N.Y.) - January 28, 1992 - 955 F.2d 820	Cases	11/07/2022
<input type="checkbox"/> PRL USA Holdings, Inc. v. U.S. Polo Ass'n, Inc. C.A.2 (N.Y.) - March 04, 2008 - 520 F.3d 109	Cases	11/07/2022
<input type="checkbox"/> ESPN, Inc. v. Office of Com'r of Baseball	Cases	11/07/2022

The right sidebar shows 'Folder analysis' with 30 recommendations (30 new), Issue #1 (Evidence involving compromise or offer of compromise as inadmissible under Rule 408 of Federal Rules of Evidence) with 21 recommendations (21 new), and Issue #2 (Admissibility of admissions made in connection with offers or discussions of compromise) with 15 recommendations (15 new).

- Show the sharing options on a folder

This close-up screenshot shows the action menu for the 'Admi Settle Mats' folder. The menu is open, displaying the following options:

- Add note
- Copy / Move
- Pin to quick access
- Rename
- Share folder
- Export
- Export to Amazon Kindle
- Delete

Additional Resources

There isn't enough time to cover everything, even in an hour-long CLE. Additionally, memories fade, notes are lost, and new features are released. We hope the resources below will help.

On-Demand Training: <https://answers.legalprof.thomsonreuters.com/wlp>

Reference Attorneys:

- Research assistance is available through the **Live chat** link at the bottom of any page on Westlaw during core business hours (Monday through Friday from 7am to 10pm CT, excluding holidays) or 24/7/365 by calling 1-800-REF-ATTY (1-800-733-2889). Utilize this service to save valuable time.
- The Reference Attorneys can help you do all this and more: assisting with general topical research, brainstorming search terms, offering tips on constructing better queries, determining the best queries to run and emailing them to you directly, and/or demonstrating cost-effective research tools and techniques.