MANAGING YOUR WESTLAW COSTS

NOVEMBER 2010

THOMSON REUTERS™

Westlaw®

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West Customer Service

Westlaw Technical Assistance (available 24 hours a day)

If you have general or technical questions about Westlaw, call West Customer Technical Support at 1-800-WESTLAW (1-800-937-8529) or send an e-mail message to west.support@thomson.com.

Technical assistance is also available online at help.west.thomson.com.

Accessibility Support

For information on West's accessibility policy, go to west.thomson.com/accessibility.

Billing and Account Assistance

For billing and account assistance, call 1-800-328-4880.

Billing and account assistance is also available online at west.thomson.com/support.

Reference Materials

For free reference materials, visit west.thomson.com/westlaw/guides. Westlaw, QuickView+, and My Account also contain valuable online Help.

About This Guide

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

Information in this guide is current through November 10, 2010.

West
610 Opperman Drive
Eagan, MN 55123-1396

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Contents

Your Westlaw Plan

If you have a special Westlaw subscription plan, e.g., a WestlawPRO plan, you can access certain databases without incurring any hourly or transactional charges. To browse the databases in your plan, click **Directory** at the top of any Westlaw page. The Westlaw Directory is displayed. The databases in your Westlaw subscription plan are listed in the right frame (Figure 1). Browse the list of databases by clicking the plus (+) and minus (–) symbols. Click a database name to access a database. Click **All Databases** in the left frame to display all Westlaw databases. Click **My Databases** to return to the list of databases in your plan.

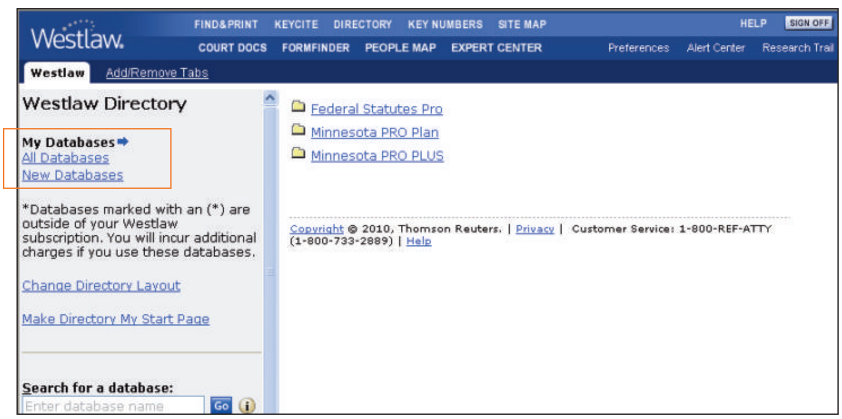


Figure 1. My Databases for a WestlawPRO plan

Identifying Databases Not in Your Plan

If you have a special Westlaw subscription plan, you can elect to have asterisks displayed beside the databases not included in your plan. To display asterisks on Westlaw, click **Preferences** at the top of any page. At the Location and Pricing Preferences page (Figure 2), select the **Display an (*) beside databases that are outside of your Westlaw subscription** check box, then click **Save Changes**.

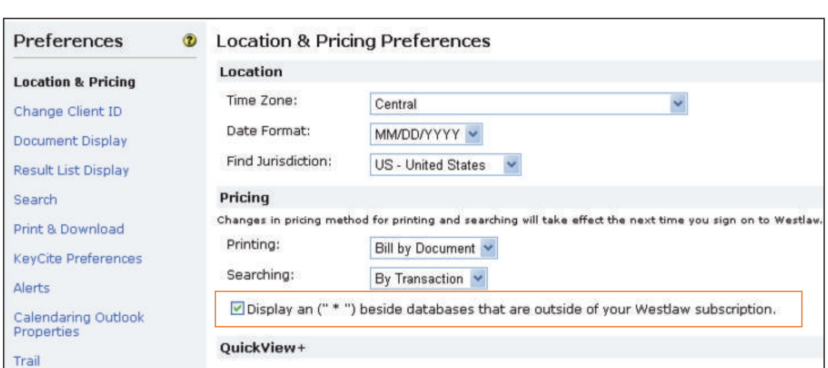


Figure 2. Location and Pricing Preferences page

Accessing Databases Outside Your Plan

You can access databases on Westlaw that are outside your Westlaw subscription plan. When you access a database outside your plan, you will incur additional charges in accordance with your Westlaw subscriber agreement. Use the Subscriber Information database (SUBSCRIBER) on Westlaw to determine the rates charged for a database that is outside your plan.

When you attempt to access a database outside your subscription plan, you will receive a message notifying you that the database is outside your plan (Figure 3). You can access the database by clicking **Continue**, or you can cancel the request by clicking **Cancel**.

If you want to view the charges for a database before deciding whether to access it, you can click **View the charges for this database** in the message. At the next page, click **View Result**. At the Results page, click the number for the entry you want to view. Information from the SUBSCRIBER database is displayed (Figure 4).

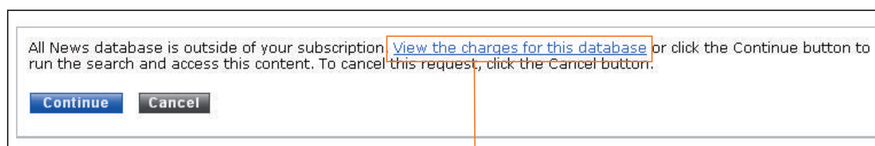


Figure 3. Warning message for the All News database

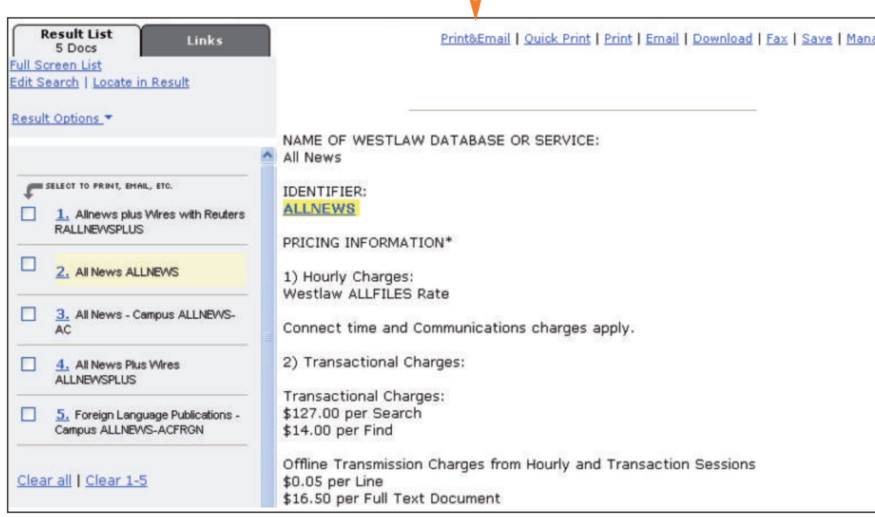


Figure 4. SUBSCRIBER information for the All News database

Using the QuickView+ Cost Recovery Service

QuickView+ is the Westlaw cost recovery and reporting service for Westlaw usage and charges. QuickView+ allows designated personnel to track Westlaw usage for a particular account, client, Westlaw user, or usage date or to substantiate specific charges. It is available at no charge.

Getting Started with QuickView+

To access QuickView+, go to **quickview.com** and type your authorized Westlaw password in the text box and click **Sign On** (Figure 5). Or click **Username and Password** to sign on using your OnePass username and password. The Create Report page is displayed (Figure 6).

If you are not a registered user, click the **Sign Up** tab at the QuickView+ page to request access. Enter the information requested in the displayed Schedule Q to West Subscriber Agreement for QuickView+ Service and then click **Submit**.

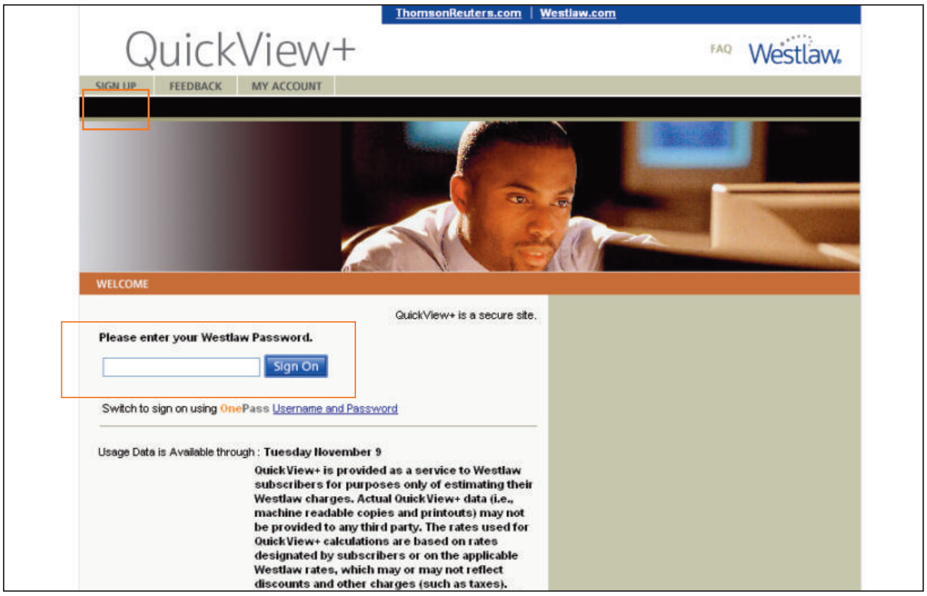


Figure 5. QuickView+ page

Tracking Your Westlaw Usage

At the Create Report page, you can tailor your Westlaw usage reports to your specific needs. You can create a report in a detail or summary format and track account usage by user, by day, or by client—or by all three. Simply choose the appropriate option from the *Select Report Format* drop-down list.

Other options available at the Create Report page include

- selecting which account or account group you want to use in the report
- choosing beginning and ending dates or a month for the report
- selecting a delivery method
- applying special pricing to your client or user charges
- having the tax calculated

After you select your options, click **Submit**.

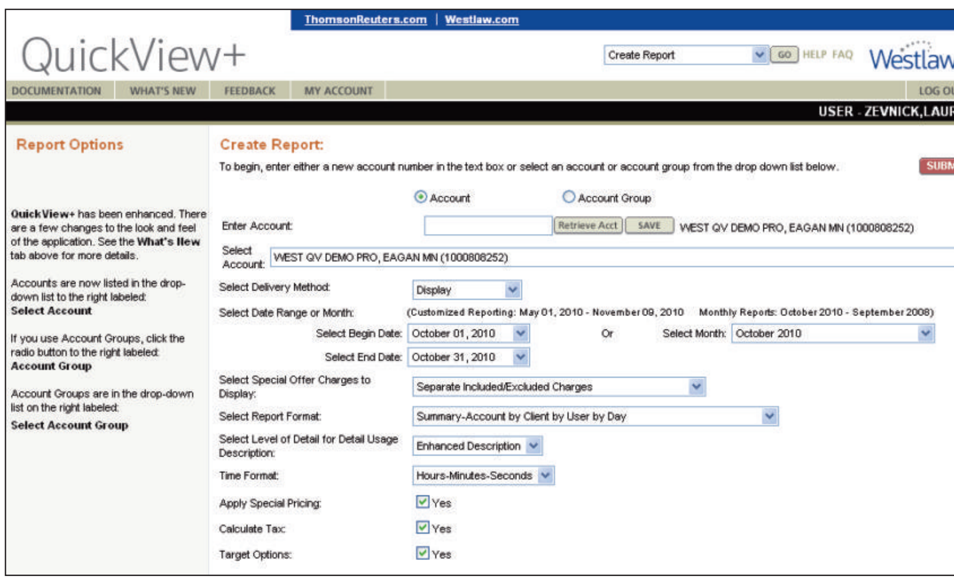


Figure 6. Create Report page

APPLYING SPECIAL PRICING

If you provide a discount to your clients for online charges, the special pricing discount feature allows you to apply the discount to the total charges in your report or to the charges included in a special pricing plan. Or, you can specify a monthly fixed-rate billing amount to allocate to client or user charges. You can also specify clients to be excluded from special pricing calculations.

SPECIAL PRICING AND TARGET OPTIONS

If you apply special pricing or target options or both at the Create Report page, the Select Special Pricing Report Options, Select Target Report Options, or Select Special Pricing and Target Report Options page is displayed (Figure 7). Select your special pricing or target options and click **Submit** to continue.

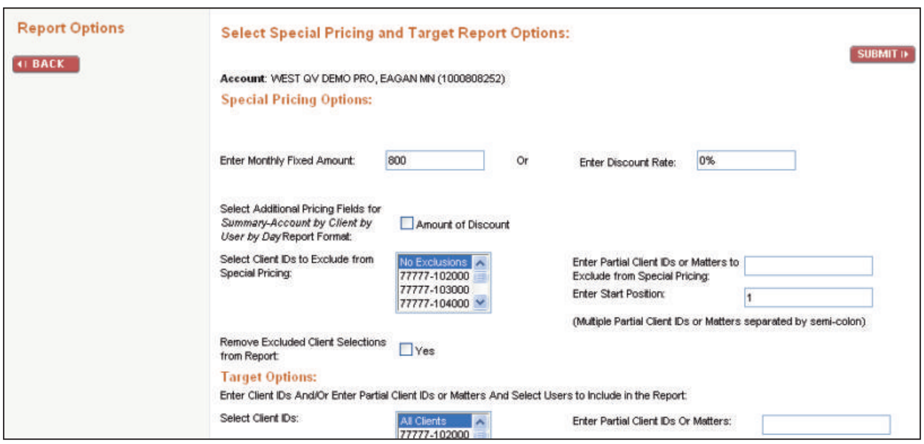
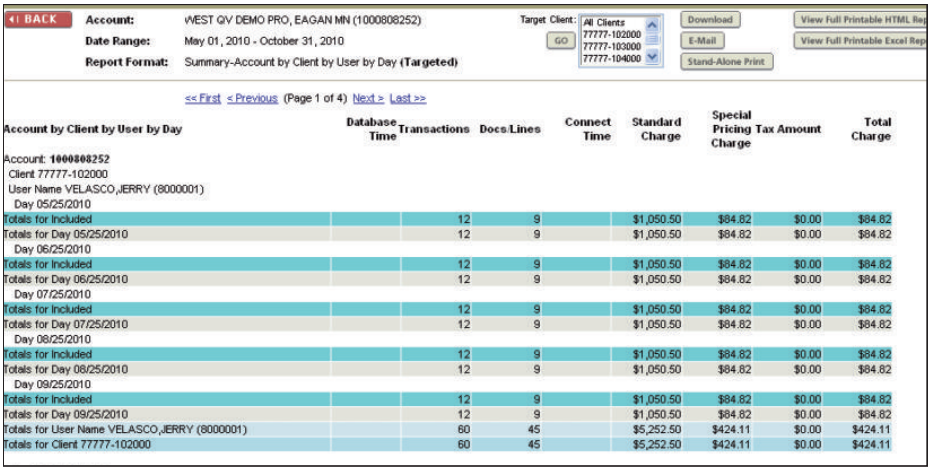


Figure 7. Select Special Pricing and Target Report Options page

A Quickview+ report, based on the selections you made, is displayed (Figure 8).


BACK

Account: WEST QV DEMO PRO, EAGAN MN (1000808252)
Date Range: May 01, 2010 - October 31, 2010
Report Format: Summary-Account by Client by User by Day (Targeted)

Target Client: All Clients / 77777-102000 / 77777-103000 / 77777-104000 GO

Download | E-Mail | Stand-Alone Print | View Full Printable HTML Rep | View Full Printable Excel Rep

<< First < Previous (Page 1 of 4) Next > Last >>

Account by Client by User by Day	Database Time	Transactions	Docs/Lines	Connect Time	Standard Charge	Special Pricing Charge	Tax Amount	Total Charge
Account: **1000808252**								
Client 77777-102000								
User Name VELASCO,JERRY (8000001)								
Day 05/25/2010								
Totals for Included		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for Day 05/25/2010		12	9		$1,050.50	$84.82	$0.00	$84.82
Day 06/25/2010								
Totals for Included		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for Day 06/25/2010		12	9		$1,050.50	$84.82	$0.00	$84.82
Day 07/25/2010								
Totals for Included		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for Day 07/25/2010		12	9		$1,050.50	$84.82	$0.00	$84.82
Day 08/25/2010								
Totals for Included		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for Day 08/25/2010		12	9		$1,050.50	$84.82	$0.00	$84.82
Day 09/25/2010								
Totals for Included		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for Day 09/25/2010		12	9		$1,050.50	$84.82	$0.00	$84.82
Totals for User Name VELASCO,JERRY (8000001)		60	45		$5,252.50	$424.11	$0.00	$424.11
Totals for Client 77777-102000		60	45		$5,252.50	$424.11	$0.00	$424.11

Figure 8. QuickView+ report

Creating a Client Invoice

If you have a WestlawPRO plan, you can create an invoice that summarizes Westlaw charges for clients who had Westlaw research done on their behalf. You can present the invoice to the client or retain it in the client file for record keeping.

To create an invoice, complete these steps:

1. Choose **Create Client Invoice** from the drop-down list at the top of the page and click **Go**. The Create Client Invoice page is displayed (Figure 9).
2. Choose the account or account group for which you want to view invoice information.
3. Choose a start date and an end date from the drop-down lists. Or, if you want to view information for one month, choose the desired month from the *Select Month* drop-down list.
4. Type your organization's name and address in the appropriate text boxes.
5. Specify how you want charges displayed on the invoice. In the *Select Charge Display* section, you can select one of these options:
   - Special Pricing (displays an allocated amount)
   - Standard Charge (displays retail charges)
   - Special Pricing and Standard Charge (displays both the retail charges and the allocated amount)
6. Specify how you want pricing displayed on the invoice.
7. Select the **Display Included/Excluded** check box next to *Select Invoice Display* if you want to list included and excluded charges separately on the invoice. Clear the check box if you want the charges combined.
8. Select the **Yes** check box next to *Target Options* to create an invoice for specific clients.
9. Click **Submit**.

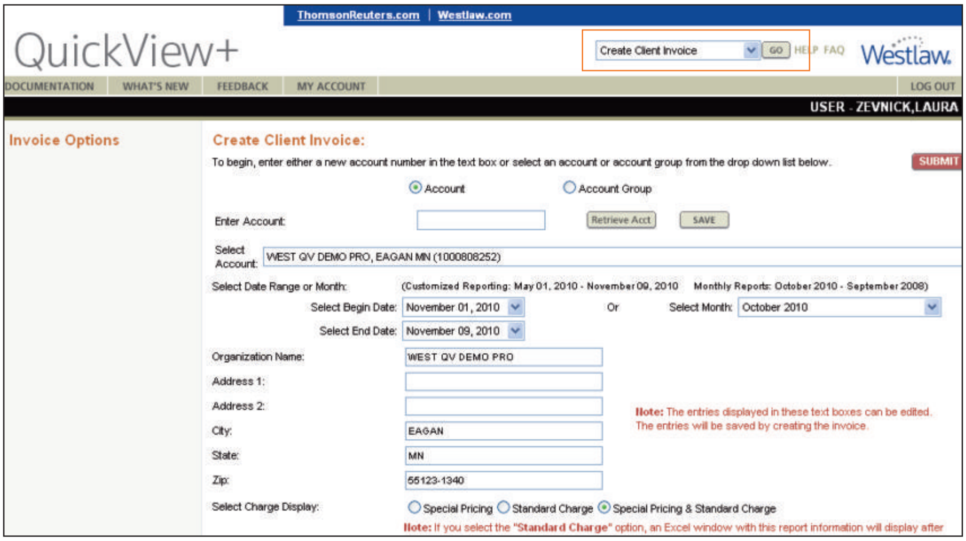


Figure 9. Create Client Invoice page

Managing Your Westlaw Account Online

My Account is a secure, Web-based service that helps you manage your Westlaw account. There is no charge to use this service. My Account allows you to quickly review your account balance and confirm the accuracy of payments received and review their allocation. You can also perform other account management tasks, including managing your Westlaw passwords.

Use My Account to do the following:

- manage account billing
- check order status
- reprint invoices
- review Westlaw client level reports
- make payments
- update addresses

Accessing My Account

If you are a new user, complete these steps:

1. Go to **west.thomson.com** and click **My Account** at the top of the page.
2. At the My Account sign-in page (Figure 10), click **Register Now**. At the Registration page, do one of the following:

- Enter your West account number, then click **Next**. At the next page, enter an invoice number or an order number and the same e-mail address you used for your OnePass account, then click **Next**.
- If you have a My Account registration key, click **Register with a Registration Key** at the bottom of the page. At the next page, enter the registration key and the same e-mail address you used for your OnePass account and click **Next**.

3. At the My Account sign-in page, type your OnePass username and password in the text boxes and click **Go**. The Welcome to My Account page is displayed (Figure 11).

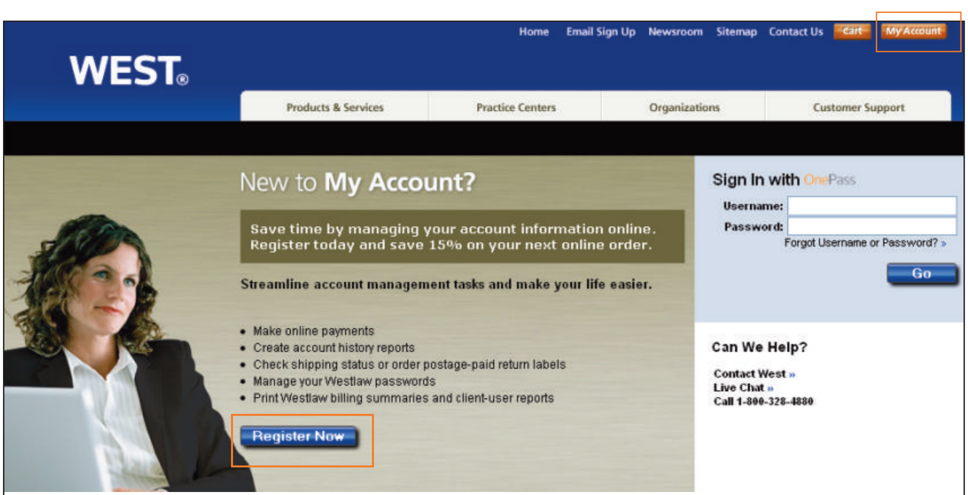


Figure 10. My Account sign-In page

At the Welcome to My Account page, click any of the links in the left frame to easily manage your account. For example, click **Online Reports** under *Reports and Alerts* to view invoices, billing reports, or usage reports (Figure 12).

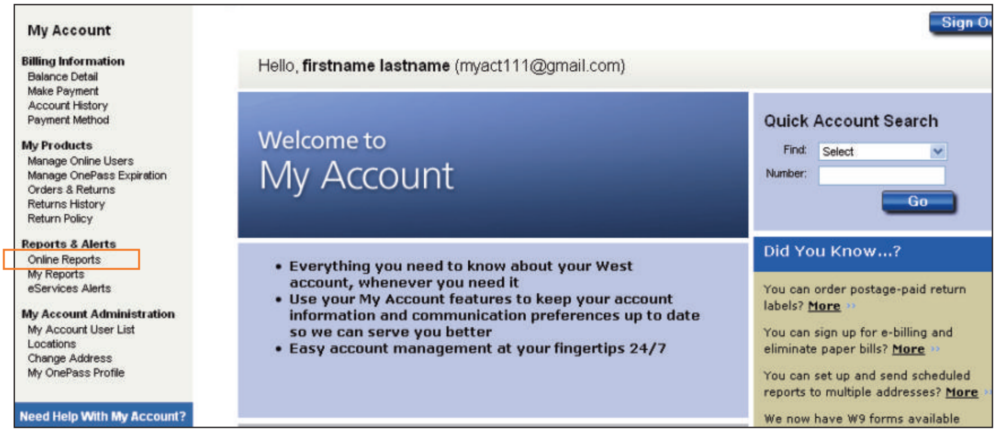


Figure 11. Welcome to My Account page

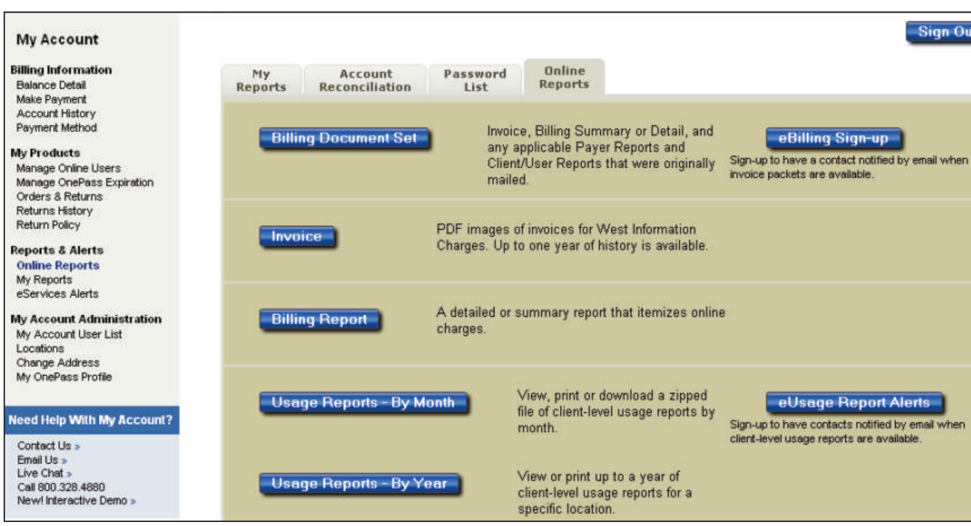


Figure 12. Online Reports page

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