



# CLIENT VALIDATION FOR WESTLAW

USER GUIDE

MAY 2009



THOMSON REUTERS™

Westlaw®



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# West Customer Service

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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](mailto:west.support@thomson.com).

If you have search questions about Westlaw, call the West Reference Attorneys at 1-800-900-WEST (1-800-900-9378) or send an e-mail message to [west.referenceattorneys@thomson.com](mailto:west.referenceattorneys@thomson.com).

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To browse and order free Westlaw reference materials, visit [west.thomson.com/westlaw/guides](http://west.thomson.com/westlaw/guides). Westlaw and other West products also contain valuable online Help.

## **About This Guide**

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

Information in this guide is current through April 10, 2009.

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West  
610 Opperman Drive  
Eagan, MN 55123-1396

Printed in the United States of America

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# 1 Getting Started with Client Validation

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Client validation is a free tool that can help you increase your firm's profitability by making it easier to trace billable research back to an individual client or matter. This feature compares each client identifier (ID) entered at the beginning of a Westlaw research session to a list of client IDs in your accounting or billing system to ensure an exact match. There are three ways to use client validation on Westlaw:

- **Thomson Reuters client validation** allows you to store your client matter lists on a secure server at Thomson Reuters.
- **Firm-hosted client validation** allows you to store your client matter lists on your firm's network.
- **Third-party client validation** integrates the client validation tool with your third-party time and billing software.

The client validation tool is part of Thomson Reuters' Cost Recovery Solutions, a suite of services that helps you access and develop cost recovery strategies and implement effective programs.

**Note:** Client validation is also available on other Thomson Reuters Web sites, such as WestFind&Print, as long as you use the same password that you use to sign on to Westlaw.

## Choosing a Type of Client Validation

You will want to consider your firm's individual needs when choosing what kind of client validation to use. If your firm uses third-party time and billing software, you may want to integrate client validation into this system. If you choose Thomson Reuters-hosted or firm-hosted client validation, you will want to consider the following:

### Thomson Reuters-hosted client validation

- works from any remote location.
- requires no setup or installation at your firm.
- validates client IDs against a client ID list uploaded to Westlaw. Your firm must send an e-mail with a text attachment that includes all valid client IDs. Clients IDs are updated in one to two business days.

### Firm-hosted client validation

- requires installation on your firm's Web server.
- requires users to have access to your firm's validation software and files.
- allows suspension of client validation by users outside your firm's network.

## Using Client Validation at Sign-on

The client validation tool validates a client ID each time you sign on to Westlaw. At the Westlaw sign-on page, type your Westlaw password and a client ID in the *Sign-On* section, and click **Sign On**. You can choose to have an error message displayed if you enter an invalid client ID. The text on this page can be customized.

## Changing a Client ID During Your Westlaw Session

The client validation feature is active during your Westlaw session. When you start research for a new client, click **Preferences** at the top of the page, and then click **Change Client ID** in the left frame. Type the new client ID in the *Enter Client ID* text box and click **Save Changes**. If you enter an invalid client ID, you will receive an error message. Enter a valid client ID and then click **Validate ID**.



Figure 2. Preferences-Change Client ID page

## Starting a New Research Trail

Client validation is also active when you start a new research trail during your Westlaw session. To start a new research trail, click **Research Trail** at the top of the page, and then click **New Research Trail**.

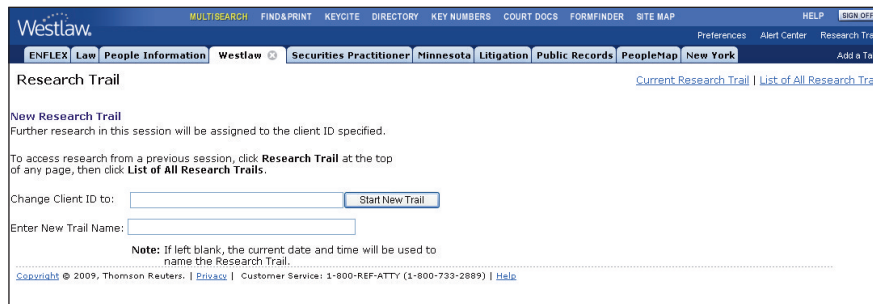


Figure 3. New Research Trail page

## Using Client Validation from Remote Locations

If your firm uses Thomson Reuters-hosted client validation, you can access client validation from any remote location. If your firm uses firm-hosted or third-party client validation, client validation is available from remote locations as long as the network where client validation resides is available.

If you don't have remote access to your firm's network or your firm's network is experiencing problems, you can still access Westlaw from a remote location by suspending client validation for the current research session. When you attempt to sign on, a page will be displayed that allows you to suspend client validation and sign on without a valid client ID. Click **Suspend Validation** to sign on to Westlaw.

## 2 Thomson Reuters-Hosted Client Validation

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Thomson Reuters-hosted client validation allows your firm to store a list of client IDs on a server at Thomson Reuters.

Thomson Reuters-hosted client validation is available from any remote location—there’s no need for you to log on to your firm’s network.

You do not need to install any software to use Thomson Reuters-hosted client validation; you simply e-mail an updated client ID to Thomson Reuters at [west.webcv@thomson.com](mailto:west.webcv@thomson.com). Client ID lists submitted during regular business hours (7 a.m. to 6 p.m. central time) are updated once a day per firm.

### Security of Thomson Reuters-Hosted Client Validation

To request more information about Thomson Reuters’ security policy, call West Customer Technical Support at 1-800-WESTLAW (1-800-937-8529), or contact your account manager.

### Registering for Thomson Reuters-Hosted Client Validation

To begin using Thomson Reuters-hosted client validation, complete the request form that is available at the end of this guide. E-mail the form as an attachment to [west.webcv@thomson.com](mailto:west.webcv@thomson.com) with your contact information or call 1-800-WESTLAW (1-800-937-8529). It is helpful if you consider the following information before completing the form:

- Client ID format (the required format for client IDs). For example, if your client ID format is NNN-AAA, a valid client ID will consist of three digits, a hyphen, and three letters.
- Validation format (the number of characters in the client ID to be validated). For example, if your client ID format is NNN-AAA, and you choose NNN as your validation format, only the first three digits will be validated against your client ID list.
- Passwords of users at your firm who will test client validation. It is recommended that you have several Westlaw users at your firm test client validation before it is implemented for all users.
- Date to implement client validation for all users at your firm.

## Changing Your Client ID Format

To change your client ID format, call 1-800-WESTLAW (1-800-937-8529).

## Updating Your Client File

When you use Thomson Reuters-hosted client validation, you can update your list of client IDs once a day. To update your list of valid client IDs, send an e-mail to [west.webcv@thomson.com](mailto:west.webcv@thomson.com). Include your firm's 10-digit account number on the subject line. Attach a text file that includes a list of all client IDs in a single column. Preferably, list your firm's account number as the first entry in the file, as in the example below:

```
1233455678
1234-001
1234-011
1999-001
1999-002
```

Please note that the list must include all valid client IDs as this file will overwrite the previous file. Partial lists cannot be added.

# 3 Firm-Hosted Client Validation

Firm-hosted client validation requires users to have access to your firm’s validation software and files and allows them to suspend client validation outside of your firm’s network. In general, to use firm-hosted client validation, your firm must host an ASP page on its intranet and store a list of valid client IDs in a text file that is read via a .dll file. You can view a sample ASP page at [west.thomson.com/software](http://west.thomson.com/software). Under *Westlaw Client Validation* in the right frame, click **Get the software now**. At the Westlaw Client Validation Module Downloads page, click **Get this module** under *Westlaw Flat-File Client Validation Module*.

Please note that Westlaw users need to be able to access these files in order to sign on to Westlaw using client validation. If users are unable to access these files, they can suspend client validation and sign on without a valid client ID.

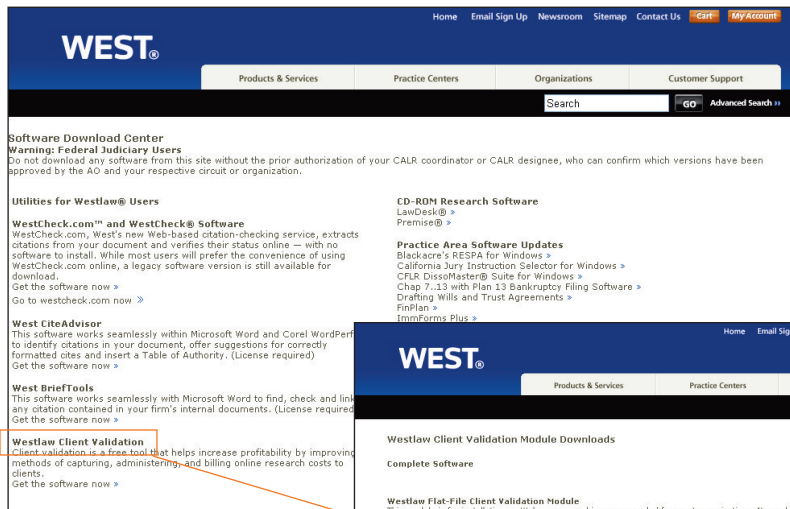


Figure 4. Software Download Center page

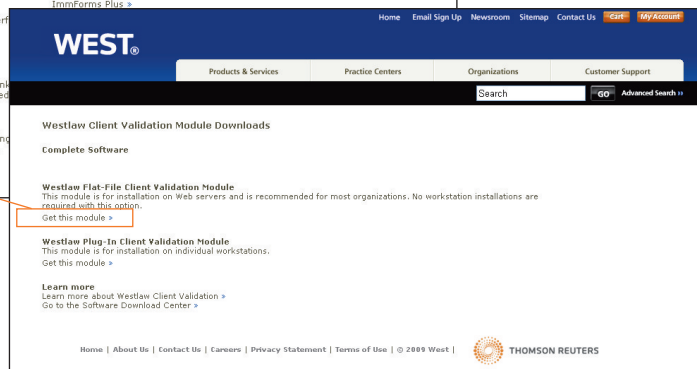


Figure 5. Westlaw Client Validation Module Downloads page

## 4 Third-Party Client Validation

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Thomson Reuters can integrate client validation with third-party time and billing software providers. When you sign on to Westlaw, a third-party page is displayed where you can select a valid client ID. For more information, call West Customer Technical Support at 1-800-WESTLAW (1-800-937-8529).

# 5 Thomson Reuters-Hosted Validation Request

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1. Complete this form and e-mail it as an attachment to [west.webcv@thomson.com](mailto:west.webcv@thomson.com).
2. In the Subject line of the e-mail, type **West-Hosted Client Validation Request**.
3. To confirm that your request was received, call 1-800-WESTLAW (1-800-937-8529), Monday through Friday.

*Account Number	
*Firm Name	
Account Numbers of additional locations, if applicable (locations will use the same file)	
*Primary Contact Name	
*Primary Contact E-mail	
*Primary Contact Westlaw Password	
*Validation Format (the number of characters to be validated)	
*Format Example (i.e., NNNN-NNNN)	
Description Text (the caption for the text box that will display the error message)	
Error Text (if an invalid ID is used)	
Firm passwords to be used for testing	
Date to implement for <b>test</b> users	
Date to implement for <b>all</b> users ( <b>Note:</b> Client validation access will be added to passwords in one business day.)	

**Client ID Format Key:**

\* = required

N=Numeric, A=Alphabetic, X=AlphaNumeric

Delimiters are hyphen, period, comma, slash, colon, space

Capital letters = Required characters, lower case letters= optional characters

To change your client ID format, complete the following. Your changes will be made in one to two business days.

Client ID Format Description ( <b>Note:</b> Client ID format is set at account level, not password level)	
Existing Client ID Format	
New Client ID Format	
Date to Change Client ID Format	

Published 5/09. Material L-349486. Replaces L-343380.

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