

Westlaw Watch® for Administrators

Westlaw Watch is a tool that streamlines the delivery of Westlaw content to your intranet, portal, or e-mail system. Without Web development expertise or Westlaw research familiarity, you can build relevant legal current awareness feeds that integrate seamlessly into your working environment. With a Westlaw Docket Watch subscription, you can also have access to docket-tailored functionality and have court docket information delivered to your intranet, portal, or e-mail system.

There's no easier way to target relevant legal and business current awareness information to the attorneys and staff who need it most.

Features

Westlaw Watch performs the following functions:

- delivers information (clips) from online newspapers, legal publications, and other sources
- searches Westlaw and delivers headlines and links to information on Westlaw
- delivers information to users throughout your organization
- integrates clips with portal software, intranets, and RSS readers
- aggregates clip results so individuals can receive daily e-mails of all results
- delivers current court docket information for newly filed civil and criminal cases from United States federal courts and selected state courts

Administrator Functions

As a Westlaw Watch administrator, you can

- create, manage, and set up delivery of alerts to users in your organization
- place Westlaw links on your intranet or portal
- customize clips, including delivery, style, and access options, for users in your organization

System Requirements

- Windows® XP, ME, 2000, 98, or 95; Windows NT; or Macintosh® OS 8.5 or later
- Internet Explorer® 5.0 or later, Netscape Navigator® 6.1 or later, or Safari 1.1 or later
- Cookies and JavaScript enabled in your browser
- 640 x 480 or higher screen resolution (800 x 600 or higher screen recommended)

For assistance with Westlaw Watch, call 1-800-REF-ATTY (1-800-733-2889), extension 43243.

For free reference materials, visit store.westlaw.com/support/user-guide/westlaw.

Signing on as an Administrator

If you are the first person from your organization to sign on to Westlaw Watch, you will be asked if you want to register as the firm's administrator. When you register as an administrator, you will receive a Personal Identification Number (PIN) via e-mail.

After you have signed on to Westlaw Watch using this PIN, you will have rights to create and edit information for the entire organization.

To access Westlaw Watch, go to watch.westlaw.com. The Westlaw Watch sign-on page is displayed.

Type your Westlaw password in the text box and click **Go**. If you want to create a personalized username and password, click **Sign on using a One Pass account**.

Note: Select the **Remember Me** check box if you want your Westlaw password or personalized username automatically entered each time you sign on to Westlaw Watch.

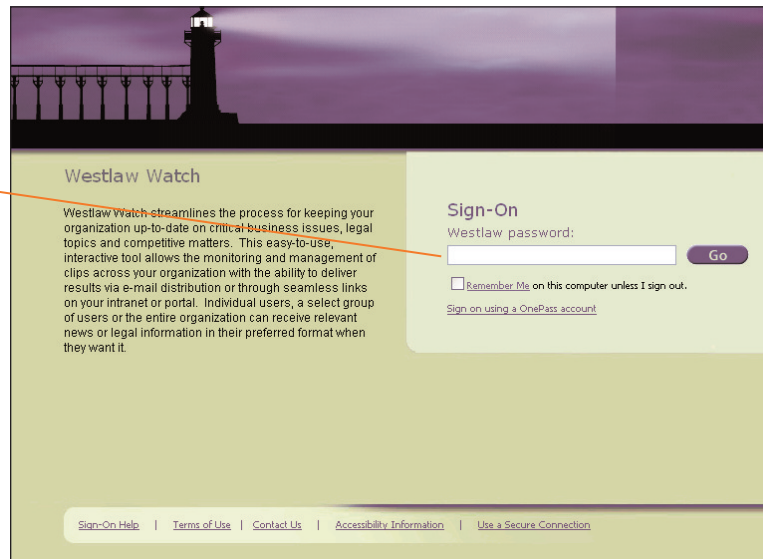


Figure 1. Westlaw Watch Sign-On page

Select the **Yes, register me as my organization's Administrator** option.

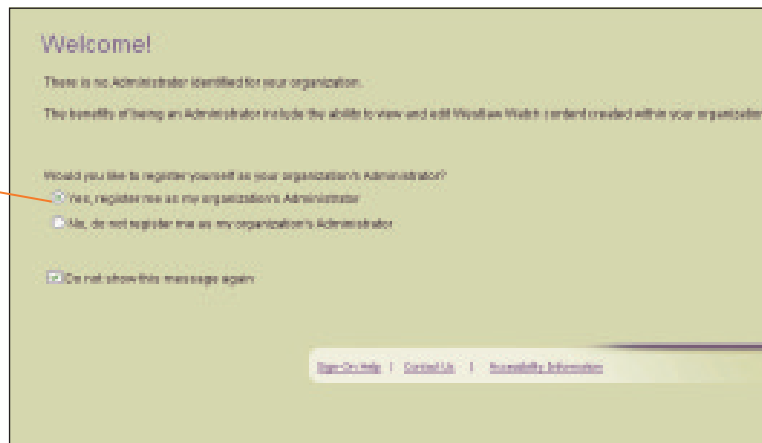


Figure 2. Welcome page

The Personal Profile screen is displayed.

Complete the **First Name**, **Last Name**, and **E-mail Address** text boxes and then click **Submit**.

PIN

Within 24 hours after submitting your administrator request, a PIN and instructions on completing the Administrator Registration will be e-mailed to you. The PIN registers you as the administrator of your organization and is used the first time you sign on to Westlaw Watch. After the initial sign-on, the PIN is no longer needed. Click the URL in the e-mail to display the Administrator Registration page as shown below.

Administrator Registration

Enter your Westlaw password:

Enter your Administrator PIN number:

[Sign-On Help](#) | [Terms of Use](#) | [Contact Us](#) | [Accessibility Information](#) | [Use a Secure Connection](#)

Enter your Westlaw password and then click **Submit**.

Figure 3. Administrator Registration page

The Administrator Access Granted page is displayed indicating you now have administrator rights.

Enter your Westlaw password and click **Go** to begin a Westlaw Watch session as an administrator.

Westlaw Watch

Westlaw Watch...Monitoring

Administrator Access Granted!

You have been successfully registered as Administrator for your organization.

The benefits of being Administrator include the ability to view and edit Westlaw Watch content created within your organization. As Administrator, you may also set organizational Profile preferences.

If you would like to begin a new Westlaw Watch session, enter your password and click "Go."

Sign-On

Westlaw password:

Remember Me on this computer unless I sign out.

[Sign on using a OnePass account](#)

Enter your Westlaw password and then click **Go** to begin a Westlaw Watch session as an administrator.

Figure 4. Administrator Access Granted page

Setting Up Your Organization Profile

As an administrator, you can set up options for your Westlaw Watch results in the Organization Profile that will apply globally to all users in your organization. These options include delivery, style, access, and administration.

You can click **Organization Profile** on any Westlaw Watch page to set up your Organization Profile after you have registered as an administrator.

Note: Individual users can override these settings and set up their own delivery options.

DELIVERY TAB

E-Mail Delivery

1. Click **Organization Profile** on any Westlaw Watch page.
2. Select one of the following e-mail delivery formats for your results:
 - Select **HTML** to deliver the result list in HTML format within the e-mail message. HTML is a graphical format that displays data compatible with Web browsers and most e-mail clients.
 - Select **HTML attachment** to deliver the result list in HTML format as an attachment in the e-mail message. The results are delivered via an attachment that opens in a new browser window.
 - Select **Text** to deliver the result list in plain text format, with no graphical display, within the e-mail message.
3. Select how you want the e-mail results displayed.
 - Select **Include full result list** to display the complete result list. Display options for the full result list include the following:
 - Select the **Include Summary** check box to display the first 250 characters for each document in the result.
 - Select the **Allow Personalization** check box to add a personalized link to the result, enabling users to customize their own delivery.
 - Select the **Remove unsubscriber link from E-mail** check box to prevent users from unsubscribing. One user cannot unsubscribe all users.
 - Select the **Include E-mail Subscription Link** check box to add a subscriber link to the result, enabling users to subscribe to e-mail delivery.
 - Select the **Include Find&Print Option** check box to retrieve and print the full text of a document from the result list.
 - Select the **Inform me of no results** check box to send yourself an e-mail informing you when there are no new results.
 - Select **Include only link to result list** to display a link to the result list. Click this link to display the results at the indicated location on your firm's intranet or portal.

The following docket options are available with a Docket Watch subscription.

- Select **Customized Docket Elements** to customize your docket delivery. Select the check boxes preceding the options in the *Recommended Elements* and *Optional Elements* columns that you want to include. Recommended elements include: Case Title, Docket Number, Court, and Filing Date. Optional elements include: Party Name(s), Attorney/Firm Name, Attorney Address, Judge Name, NOS/CaseType, and Jury Demand Info.
- Select **Deliver Full Docket** to deliver the complete docket result from Westlaw.
- Select the **Web Delivery**, **Aggregate E-Mail**, or **Batch Delivery** check box under *Also apply Docket Options to* to apply the docket delivery options to other delivery methods.

DELIVERY TAB

Web Delivery

1. Click **Organization Profile** on any Westlaw Watch page.
2. Click **WEB DELIVERY** on the Delivery tab.
3. Select one of the following e-mail delivery formats for your results:
 - Select the **HTML** check box to deliver the result list in HTML format. HTML is a graphical format that displays data compatible with Web browsers and most e-mail clients.
 - Select the **XML** check box to deliver the result list in XML (Extensible Markup Language) format. XML is a markup language that describes data so that the included content can be reused in other formats and shared across different systems.
 - Select the **RSS** check box to deliver the result list in an XML format that adds feeds and displays results on an RSS (Really Simple Syndication) Reader, which can reside on a desktop, a Web page, your intranet page, or your portal.
 - Select the **Portal** check box to display the result list in a portal, which provides browser-based access to internal software applications and information used by employees. Then choose one of the following portals from the drop-down list: **Livelink ECM-eDOCS**, **Plumtree 5**, **SV LawPort**, **SharePoint**, or **WorkSite**.
4. Select the following options for your results:
 - Select the **Include Summary** check box to display the first 250 characters of each document in the result.
 - Select the **Include E-mail Subscription Link** check box to add a subscriber link to the result, enabling users to subscribe to e-mail delivery.
 - Select the **Allow Personalization** check box to add a customize link to the result, enabling users to customize their own delivery.
 - Select the **Include Find&Print Option** check box to retrieve and print the full text of a document from the result list.

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5. Select one of the following display options:
 - Select **All Results** to select all results, then choose the maximum number of results you want to display from the drop-down list.
 - Select **Only new results since last run** to display only new results since the last run.

The following Docket options are available with a Docket Watch subscription.

- Select **Customized Docket Elements** to customize your docket delivery. Select the check boxes preceding the options in the *Recommended Elements* and *Optional Elements* columns that you want to include. Recommended elements include: Case Title, Docket Number, Court, and Filing Date. Optional elements include: Party Name(s), Attorney/Firm Name, Attorney Address, Judge Name, NOS/Case Type, and Jury Demand Info.
- Select **Deliver Full Docket** to deliver the complete docket result from Westlaw.
- Select the **Web Delivery**, **Aggregate E-Mail**, or **Batch Delivery** check boxes under *Also apply Docket Options to* to apply the docket delivery options to other delivery methods.

DELIVERY TAB

Aggregate E-Mail Delivery

1. Click **Organization Profile** on any Westlaw Watch page.
2. Click **AGGREGATE E-MAIL** on the Delivery tab.
3. Select one of the following e-mail delivery formats for your results:
 - Select **HTML** to deliver the result list in HTML format within the e-mail message. HTML is a graphical format that displays data compatible with Web browsers and most e-mail clients.
 - Select **HTML attachment** to deliver the result list in HTML format as an attachment in the e-mail message. The results are delivered via an attachment that opens in a new browser window.
 - Select **Text** to deliver the result list in plain text format with no graphical display within the e-mail message.
4. Select how you want the e-mail results displayed.
 - Select **Include full result list** to display the complete result list. Display options for the full result list include the following:
 - Select the **Include Summary** check box to display the first 250 characters for each document in the result.
 - Select the **Inform me of no results** check box to send yourself an e-mail informing you when there are no new results.
 - Select the **Include Find&Print Option** check box to retrieve and print the full text of a document from the result list.
 - Select the **Remove Unsubscriber link from E-mail** check box to remove the Unsubscriber link from e-mail results.
 - Select **Include only link to result list** to display a link to the result list. Type the URL in the text box. You'll be able to click this link to display the results at the indicated location on your firm's intranet or portal.

The following docket options are available with a Docket Watch subscription.

- Select **Customized Docket Elements** to customize your docket delivery. Select the check boxes preceding the options in the *Recommended Elements* and *Optional Elements* columns that you want to include. Recommended elements include: Case Title, Docket Number, Court, and Filing Date. Optional elements include: Party Name(s), Attorney/Firm Name, Attorney Address, Judge Name, NOS/Case Type, and Jury Demand Info.
- Select **Deliver Full Docket** to deliver the complete docket result from Westlaw.
- Select the **E-Mail Delivery**, **Web Delivery**, or **Batch Delivery** check boxes under *Also apply Docket Options to* to apply the docket delivery options to other delivery methods.

DELIVERY TAB

Batch Delivery

1. Click **Organization Profile** on any Westlaw Watch page.
 2. Click **BATCH DELIVERY** on the Delivery tab.
 3. Select one of the following delivery formats for your results:
 - Select **XML** to deliver the result list in XML format. XML is a markup language that describes data so that the included content can be reused in other formats and shared across different systems.
 - Select **Comma Separated File (.csv)** to deliver results in a delimited data file format that has fields separated by the comma character and each record starting on a new line. CSV files can be saved in many spreadsheet applications such as Microsoft Excel, or text editors such as Microsoft Notepad. To save in Notepad, simply change the file extension to .csv when saving.
 - Select **HTML** to deliver the result list in HTML format. HTML is a graphical format that displays data compatible with Web browsers and most e-mail clients.
 4. Select one of the following delivery methods for your batch delivery:
 - Select the **West Hosted Location** check box (default) to save the file to a URL where you can access results.
 - Select the **Via E-Mail** check box to be notified via e-mail when your batch file is saved to the West-hosted URL. Click **Add** to select an e-mail address from the Address Book that includes e-mail addresses for registered Westlaw Watch users, or type an e-mail address in the text box.
 - Select the **Via RSS Feed** check box to have results displayed on an RSS Reader, your intranet, or your portal. Batch file delivery results are always accessible via RSS feed. The Entry Manager displays an RSS icon next to the Batch Delivery entry after it is created.
 - Select the **Send File via E-Mail Attachment** check box to send your batch file via an e-mail attachment. Click **Add** to select an e-mail address from the Address Book that includes e-mail addresses for registered Westlaw Watch users, or type an e-mail address in the text box.
- Note:** Some batch files may be too large to be sent via regular e-mail.

The following docket options are available with a Docket Watch subscription.

- Select **Customized Docket Elements** to customize your docket delivery. Select the check boxes preceding the options in the *Recommended Elements* and *Optional Elements* columns that you want to include. Recommended elements include: Case Title, Docket Number, Court, and Filing Date. Optional elements include: Party Name(s), Attorney/Firm Name, Attorney Address, Judge Name, NOS/Case Type, and Jury Demand Info.
- Select **Deliver Full Docket** to deliver the complete docket result from Westlaw.
- Select the **E-Mail Delivery**, **Web Delivery**, or **Aggregate E-Mail** check boxes under *Also apply Docket Options to* to apply the docket delivery options to other delivery methods.

STYLE TAB

Complete these steps to modify and set up colors and fonts for your results:

1. Click **Organization Profile** on any Westlaw Watch page, then click the **Style** tab.
2. Choose **Background**, **Text**, or **Custom** from the *Modify Colors/Fonts* drop-down list to modify colors and fonts. A sample of your changes is displayed on the Preview Sample tab.

The image displays three overlapping screenshots of the 'Organization Profile' style configuration page. Each screenshot shows the 'Style' tab selected, with the 'Modify Colors/Fonts' dropdown menu open. The top screenshot shows the 'Background' setting, the middle shows 'Text', and the bottom shows 'Custom'. Each screenshot also shows a 'Preview Sample' tab on the right, which displays a preview of the Westlaw Watch interface with the selected settings applied. Orange arrows point from text labels on the left to specific elements in the screenshots.

Background
Choose a color for the header and body of your result list.

Click **preview all changes** to view the colors you selected.

Text
You can modify the color and fonts for the header, publication, summary, links, and visited links.

Click **preview all changes** to view the colors and fonts you selected.

Custom
Select the **Apply Cascading Style Sheet** check box to apply a Cascading Style Sheet (CSS) URL to your result list instead of colors or fonts. If you select this check box, you must enter a public URL in the text box.

Select the **Add custom logo** check box and enter a public URL on which the organization logo is stored.

Figure 5. Organization Profile pages

ACCESS TAB

Various options are available to simplify access to content on Westlaw.

1. Click **Organization Profile** on any Westlaw Watch page, then click the **Access** tab.
2. Click **E-MAIL DELIVERY**, **WEB DELIVERY**, **AGGREGATE E-MAIL**, or **BATCH DELIVERY** (available with a Docket Watch subscription).

Transparent Authentication Settings

The same transparent authentication settings can be applied to e-mail, a Web address, aggregate e-mail, and batch delivery results. Contact your West account manager to configure transparent authentication for your organization and to receive a sponsor or customer ID.

The following options are available for transparent authentication settings:

- Select **Do not apply authentication settings** (default) to not automatically apply authentication settings. Users who click a link in a result list will have to enter a Westlaw password and provide a client ID before viewing the full text of the document.
- Select **Pooled Authentication** to apply a pooled authentication sponsor ID, which allows users to access Westlaw without entering a Westlaw password. Users will not have to enter a Westlaw password to sign on but their identity will be detected and their Westlaw password will be provided behind the scenes. Select the **Redirection URL** check box to use a time-encryption URL, then type the redirection URL in the text box.
- Select **User Level Transparent Authentication** and enter a customer ID in the text box to set up user level access authentication.

Note: Your organization must be set up for this functionality before you can use this feature. Contact your West account manager or technology consultant to see if user-level authentication will benefit your organization.

Client ID Settings

A client ID is required to sign on to Westlaw and is used to identify Westlaw sessions. If you choose to set up a client ID, it will be used by all members of your organization when they access Westlaw.

Select one of the following client ID options:

- Select **Do not apply client ID settings** (default) to not apply client ID settings.
- Select **Apply client ID settings** to apply client ID settings, then enter a client ID in the text box.

Apply These Authentication and Client ID Settings

Select one or all of the delivery methods that you want to apply the same transparent authentication and client ID settings to, including the following: **E-Mail Delivery**, **Web Delivery**, **Aggregate Delivery**, or **Batch Delivery** (available with a Docket Watch subscription).

Find&Print Transparent Authentication Settings

Transparent authentication is available to simplify access to WestFind&Print from the result list in Westlaw and can be applied the same using all delivery methods.

Select the **Use a sponsor for Find&Print transaction from results** check box to apply a pooled authentication sponsor ID, which allows users to access Westlaw without entering a Westlaw password. Users will not have to enter a Westlaw password to sign on but their identity will be detected and their Westlaw password will be provided behind the scenes. Users who do not have a Westlaw password will be issued one automatically.

Note: Your organization must be set up for this functionality before you can use this feature. Contact your West account manager or technology consultant.

Client ID Settings

A client ID is required to sign on to Westlaw and is used to identify Westlaw sessions. If you choose to set up a client ID, it will be used by all members of your organization when they access Westlaw. Select one of the following client ID options:

- Select **Do not apply client ID settings** (default) to not apply client ID settings.
- Select **Apply client ID settings** to apply client ID settings, then enter a client ID in the text box.

Apply These Authentication and Client ID Settings

Select one or all of the delivery methods that you want to apply the same transparent authentication and client ID settings to including the following: **E-Mail Delivery, Web Delivery, Aggregate Delivery, or Batch Delivery.**

ACCESS TAB

Target Platform (available with a Docket Watch subscription)

Select one of the following destination interfaces for Docket Alert links:

- Select **Westlaw (<http://westlaw.com>)** (default) to access Westlaw from Docket Alert links.
- Select **Westlaw CourtExpress (<http://courtextpress.westlaw.com>)** to access Westlaw Court Express from Docket Alert links.

Administration Tab

The Administration tab allows you to set up error notification options and select the default time zone for the results. You can also administer the Address Book and Westlaw passwords on the Administration tab.

1. Click **Organization Profile** on any Westlaw Watch page, then click the **Administration** tab.
2. Type the administrator's e-mail address in the *Administrator E-mail* text box to create a user feedback link on the result list.

Error Notification Options

Select the **arrow** next to Error Notification Options to set up receipt of error notification messages from Westlaw Watch.

Basic error notification includes an error notification e-mail sent to designated users when Westlaw Watch e-mails cannot be delivered. Select one or more of the following people you want to receive the Basic Error Notification e-mail: **Administrator, Delegate(s), E-mail subscriber(s)**.

Administrator/Delegate Controls

- Select the **Administrator/Delegate Access Only** check box to allow only administrators and delegates access to Westlaw Watch.
- Select the **Display Access Tab to Administrators/Delegates only** check box to hide the Access tab from nonadministrators and nondelegates. If you choose to hide the Access tab, you must select how to apply access settings to alerts created by nonadministrators and nondelegates.
 - Select **Use organization profile settings for clips/alerts created by nonadministrators** to use organization profile settings.
 - Select **Always prompt for password and client ID for clips created by nonadministrators** to always prompt for a password and client ID.
 - Click **Administer Address Book** to view and edit the Address Book. You can delete addresses, add new addresses, or edit current addresses.
- Click **Administer Westlaw Passwords** to change the Westlaw password associated with a user account. Choose a user from the *Select User* drop-down list. Type a new Westlaw password in the *New Password* text box and then click **OK**.

Delegate Administration

As an administrator, you can set up Westlaw Watch users as delegates with administrator rights. Delegates can view and modify all feeds created within the organization. For example, you can assign delegate rights to an employee in a location to oversee the creation of feeds for the location. Or, you can assign delegates who could create and maintain feeds by practice area or department.

Delegates have the same rights as the administrator, except delegates cannot assign additional delegates.

Published 9/09. L-350581.

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