

Westlaw AU

Using Folders to Organise Your Research

Westlaw AU folders help you to organise, manage and share your research. This includes the ability to save searches, documents and snippets, and includes the ability to share folders and content with colleagues within your organisation.

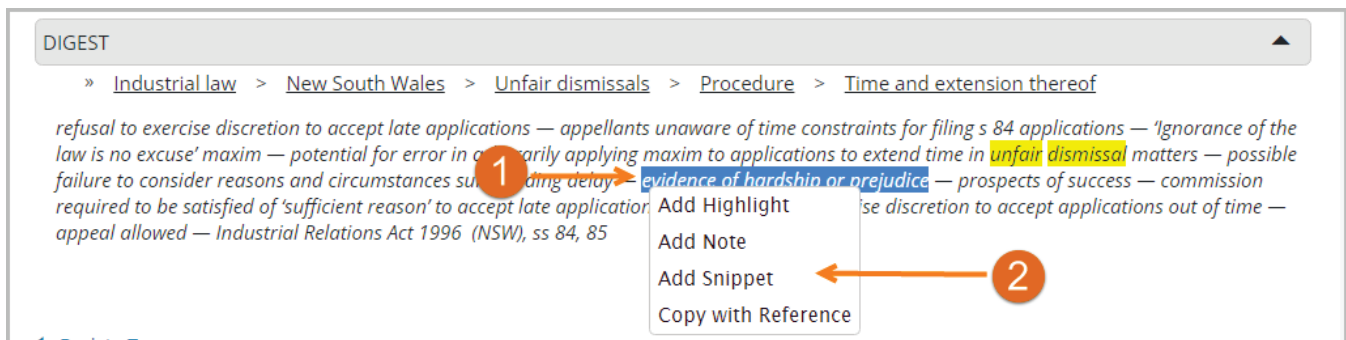
Note: Your annotations will not be shared with others as these are unique to you.

Saving Research to My Folders

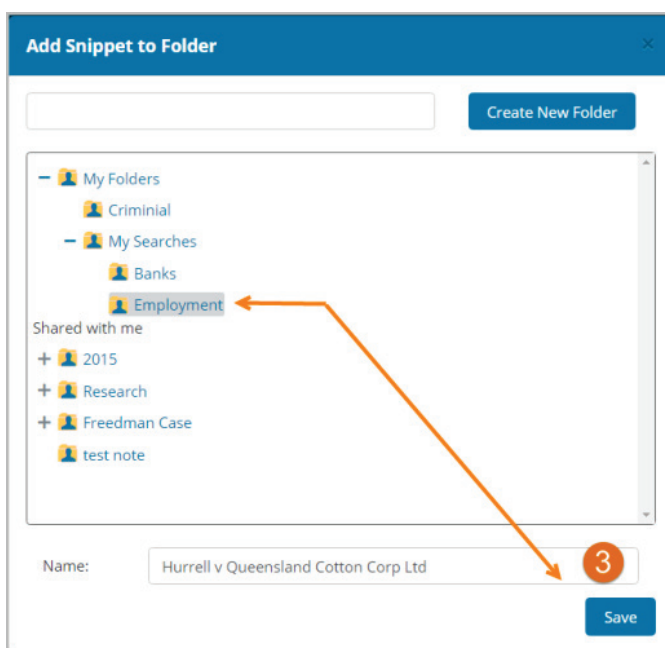
Snippets

A snippet is a section of text which may include a quote, legal principal and/or relevant text. Snippets are saved to a folder and when you click on a saved snippet it will take you directly to that section of the document referenced.

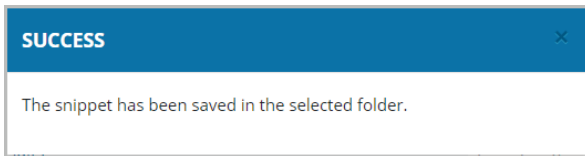
1. Select a section of text you want to save. If you choose to create a new folder you must do this first before saving the search.
2. Choose **Add Snippet** from the menu.



3. Select or create a **New Folder** to save the snippet to then click **Save**.



- Click X from the **Success** menu.




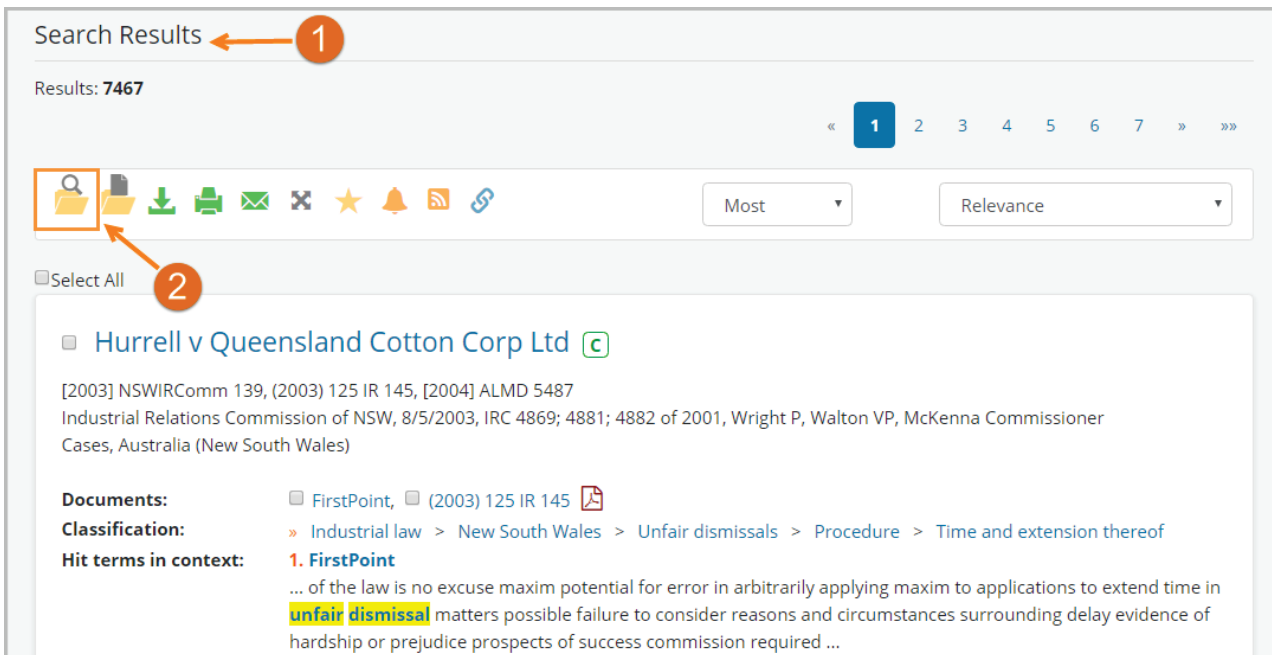
The Snippet is now saved within My Folders to the selected folder.

Note: There is a minimum of 512 characters you can select to save as a Snippet.

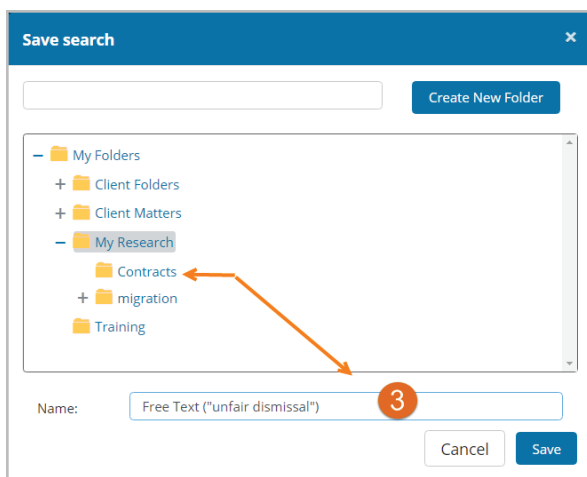
Saving Research to My Folders

Saving a Search

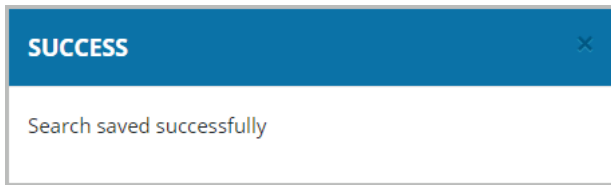
- Conduct a Westlaw AU search.
- Click **Save search to my folders** icon  from the main toolbar.



- Select a folder or create a new folder. If you choose to create a new folder you must do this first before saving the search.



4. Click the **Save** button then click X from the **Success** menu.



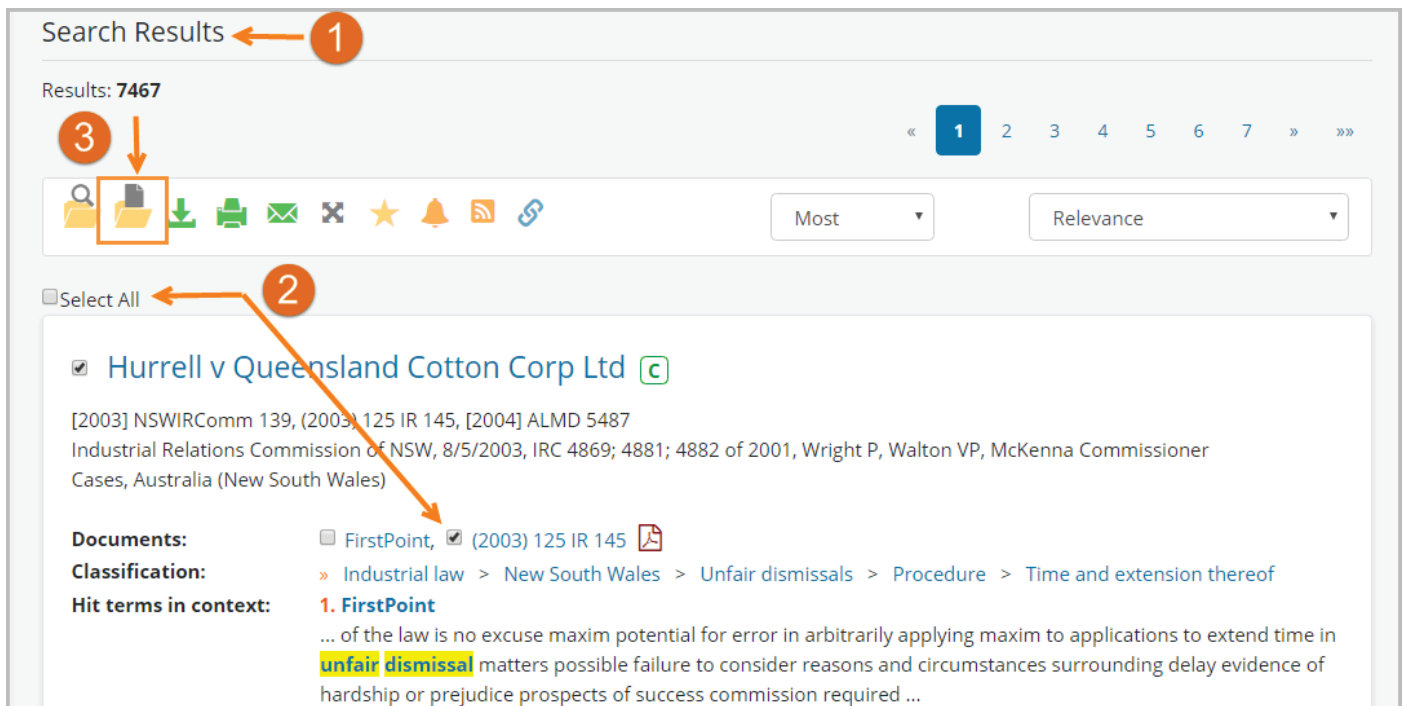
Note: If you have Contributor rights to a shared folder, you can also save searches to that folder.


Saving Research to My Folders

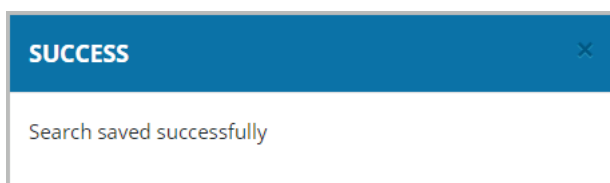
Saving Selected Documents – Search Results

You can select documents from the search results list to save to a folder.


1. Conduct a Westlaw AU search
2. From the Search Results list click **Select All** to clear selection, then place a **tick** next to the required document/s.

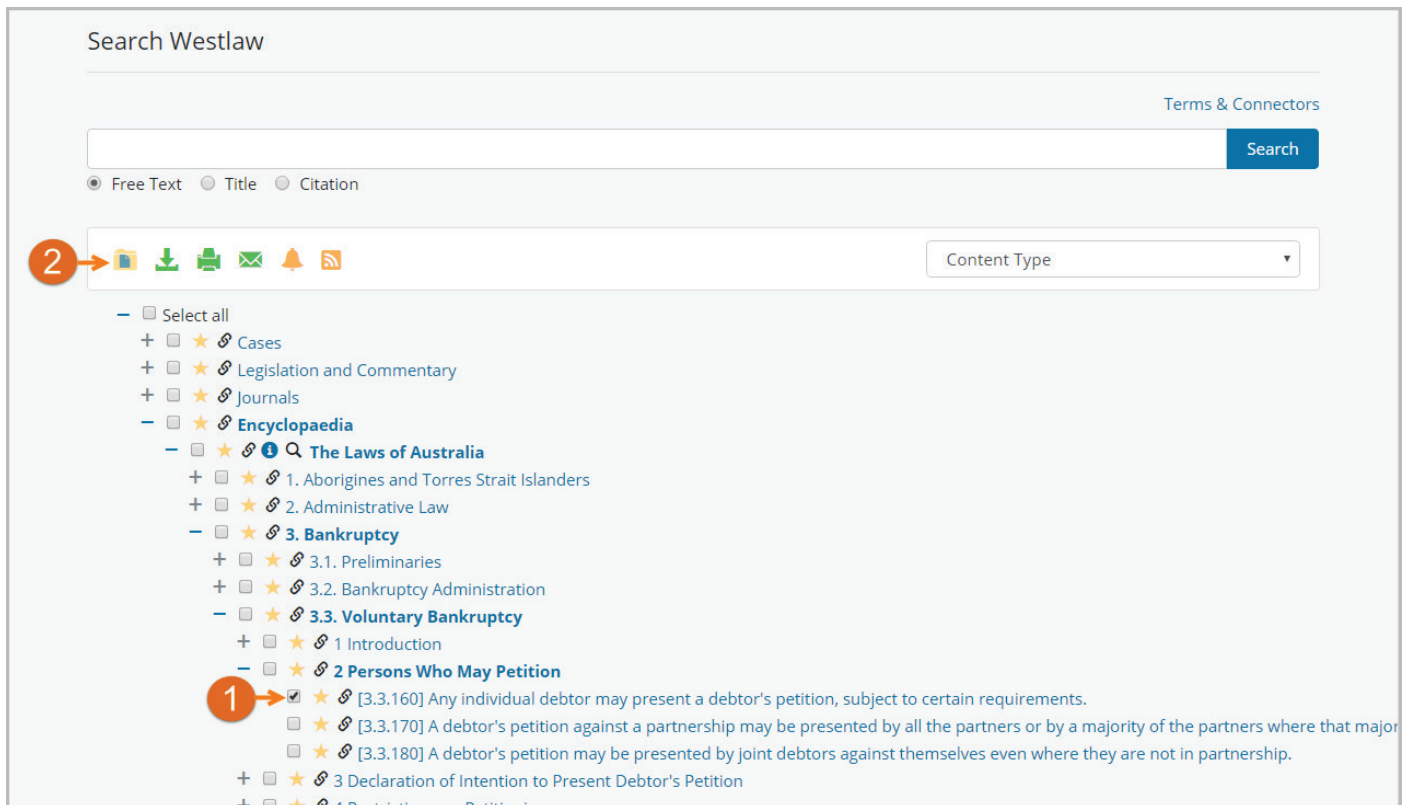


3. Click **Save selected documents to my folders** icon  from the main toolbar.
4. Choose a folder location, or create a new folder.
5. Click the **Save** button then click X from the **Success** window.



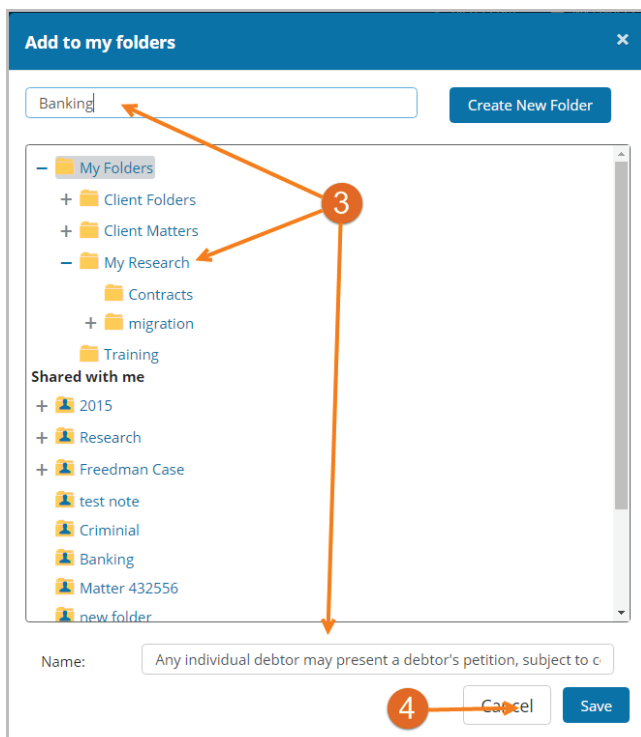
Save a Document – Document View

1. Navigate to a document via the Table of Contents, or by selecting a document from the Results list.
2. Click **Add to Folder** icon  from the main toolbar.



The screenshot shows the 'Search Westlaw' interface. At the top right, there is a link for 'Terms & Connectors'. Below it is a search bar with a 'Search' button. Underneath the search bar are radio buttons for 'Free Text', 'Title', and 'Citation'. A toolbar contains several icons, with a red circle '2' pointing to the 'Add to Folder' icon (a folder with a plus sign). Below the toolbar is a tree view of document categories. A red circle '1' points to a document titled '[3.3.160] Any individual debtor may present a debtor's petition, subject to certain requirements.' which is currently selected.

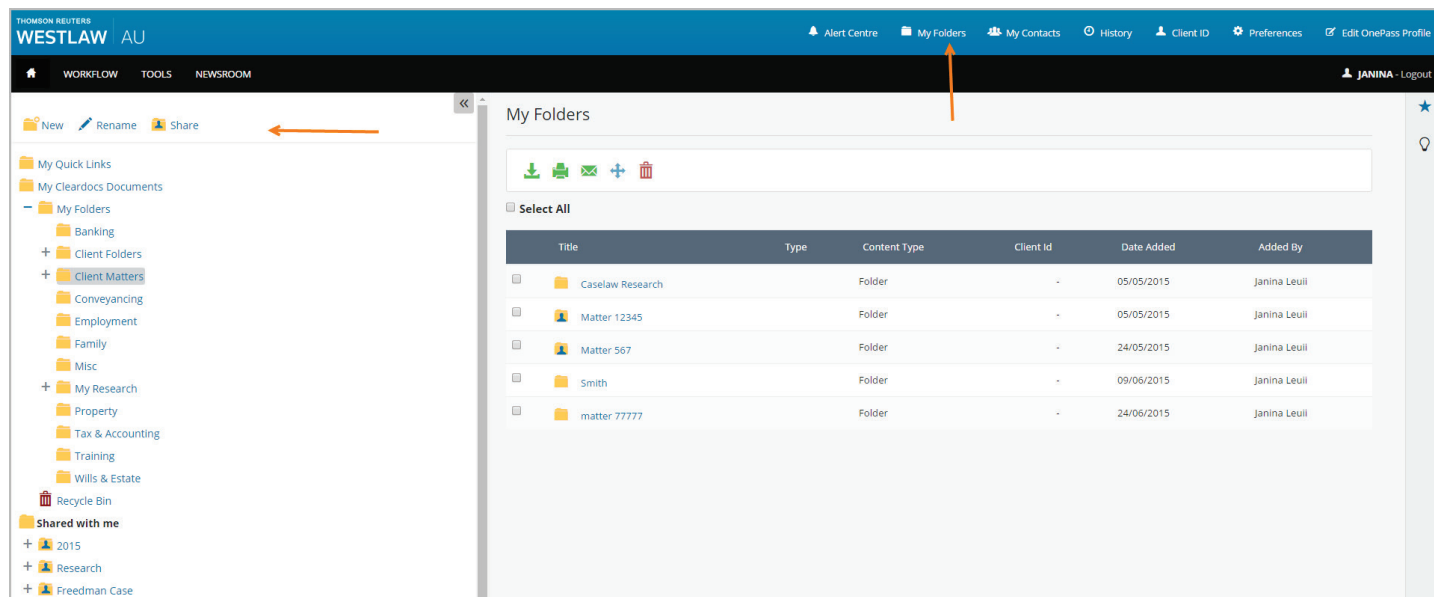
3. Edit the document title if required then select a folder location, or create a new folder
4. Click the **Save** button then click X from the **Success** window.



The screenshot shows the 'Add to my folders' dialog box. At the top, there is a text input field containing 'Banking' and a 'Create New Folder' button. Below this is a tree view of folders. A red circle '3' points to the 'Banking' folder in the tree. At the bottom of the dialog, there is a 'Name:' label followed by a text input field containing the document title. A red circle '4' points to the 'Save' button.

My Folders

My Folders is located in the top tool bar, click **My Folders** to view and manage your folders.



My Quick links

This folder lists your Quick links and enables you to view and edit items.

My Cleardocs

This folder lists your Cleardocs documents, and enables you to link and edit items.

My Folders

This folder lists your personal folders and enables you to view and manage saved documents and/or searches.

Share with Me

This lists other Users folders that have been shared with you.

Managing Folders

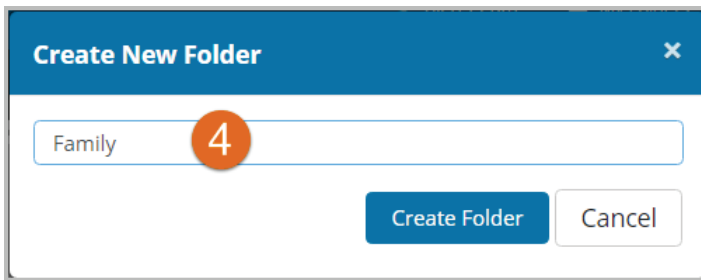
When you save research in folders, it is stored for the life of your subscription. You can save an unlimited number of documents and searches to your folders so organising your research is important. This will allow you to quickly and efficiently locate and access your research.

The My Folders page provides a number of options for managing your folders including the ability to create and rename folders, move, delete and restore items.

Create a New Folder

You can create and name folders and subfolders to assist in organising your research.

1. Go to the **My Folders** page.
2. From the LHS select the location where you want the new folder to reside.
3. Click on the **New** icon.
4. Type in the new folder name and click **Create Folder** to create a new folder.



5. Click **Create Folder** then X to close the confirmation window.

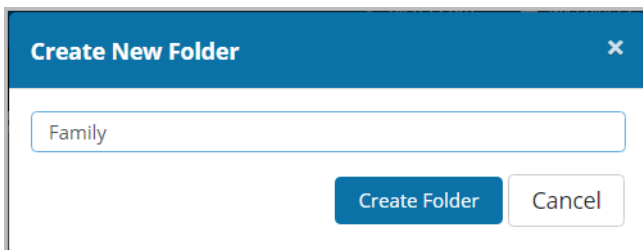


The new folder will be created and appear immediately on the LHS and main screen

Rename a Folder Rename


You can edit and rename folders you have created through the My Folders page.

1. Go to the **My Folders** page.
2. From the LHS select the folder you want to edit.
3. Click on the **Rename** icon.
4. Type in a new name and click **Rename** then X to close the confirmation window.








Move Items in a Folder







You can move a folder, including all content and/or select individual items to move to another folder location.

1. To move a folder and/or item, tick the checkbox beside the item/s name. You can choose one or multiple items to move at one time.
2. Click the **Move Items** icon 

My Folders

Select All

Title	Type	Content Type	Client Id	Date Added	Actions
<input type="checkbox"/> (1988) 164 CLR 662: Australia & New Zealand Banking Group Ltd v Westpac Banking Corporation!	Document	Cases	-	12/09/2016	
<input checked="" type="checkbox"/> FirstPoint: Australia & New Zealand Banking Group Ltd v Westpac Banking Corporation!	Document	Cases	-	12/09/2016	
<input type="checkbox"/> FirstPoint: Bank of New South Wales v CampbellH	Document	Cases	-	12/09/2016	
<input checked="" type="checkbox"/> FirstPoint: Barton v Bank of New South WalesH	Document	Cases	-	12/09/2016	
<input type="checkbox"/>  Liability of Banks - Mistake	Search	Search	-	12/09/2016	






3. Select the new folder location from the **Move to..** window then click the **Move Items** button.
4. Click **X** to close the confirmation window. The selected items will now appear in the new location.

Delete Items in a Folder



You can delete folders with all contents and/or select individual items to delete. Deleted items are moved to the Recycle bin where you can reinstate or permanently delete at a later date.

1. To delete a folder and/or item, tick the checkbox beside the item/s name. You can choose one or multiple items to move at one time.
2. Click the **Recycle Bin** icon then **X** to close the confirmation window.

My Folders

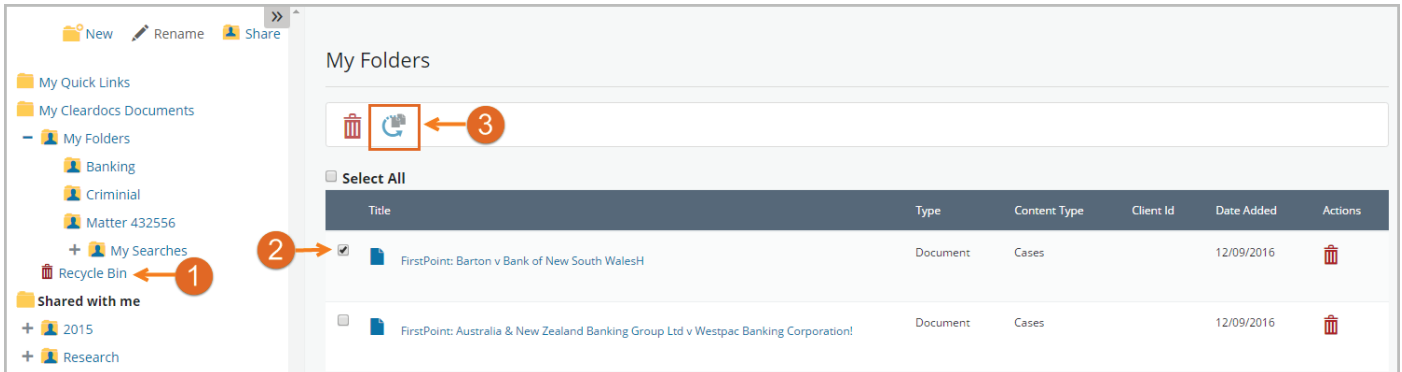






Select All

Title	Type	Content Type	Client Id	Date Added	Actions
<input checked="" type="checkbox"/> FirstPoint: Australia & New Zealand Banking Group Ltd v Westpac Banking Corporation!	Document	Cases	-	12/09/2016	
<input checked="" type="checkbox"/> FirstPoint: Barton v Bank of New South WalesH	Document	Cases	-	12/09/2016	

Restore item from Recycle bin

1. To restore a folder and/or item back into My Folders, select the **Recycle Bin** folder in the LHS.
2. Tick the checkbox beside the item name. You can choose one or multiple items to move at one time.
3. Click the **Restore to Folder** icon



4. Select the new folder from the Restore a copy to window and click the **Restore to folder** button.
5. Click X to close the confirmation window. The selected item(s) will be restored to the new folder location.

Delete Items from the Recycle Bin

1. To permanently delete a folder and/or item, select the **Recycle Bin** folder in the LHS.
2. Tick the checkbox beside the item(s) name. You can choose one or multiple items to move at one time.
3. Click the Manage drop down list and select **Delete**.
4. Click **OK**. The selected item will be permanently deleted.

Document Delivery

Documents saved to My Folders can be Printed, Downloaded or Emailed.






Note: Only documents can be included in delivery options, saved searches is not an option.
If you select a folder all items including sub folders will be included in the request. There will be a max of 50 documents that can be included at one time.

To Print, Download or Email




1. Go to **My Folders** and select a folder
2. Tick the checkbox beside the item(s) name. You can choose one or multiple items at one time.

3. Select the required delivery option to Download, Print or E-mail.   

My Folders

Select All

Title	Type	Content Type	Client Id	Date Added	Actions
<input type="checkbox"/> (1988) 164 CLR 662: Australia & New Zealand Banking Group Ltd v Westpac Banking Corporation!	Document	Cases	-	12/09/2016	
<input checked="" type="checkbox"/> (2009) 180 FCR 161: Commonwealth Bank of Australia v Deputy Commissioner of Taxation	Document	Cases	-	14/09/2016	
<input checked="" type="checkbox"/> FirstPoint: Australian Prudential Regulation Authority v Siminton (No 6)x	Document	Cases	-	14/09/2016	

4. Select the download options then click **OK**.

Download Options

Format Word / WordPerfect (RTF)
 PDF
 HTML

Left Margin:

Options

- Display Status Flags
- Display Document Path
- Underline Live Links
- Highlight Search Terms
- Include Summary Page
- Include History Notes
- Include Head Notes
- Include Footnotes
- Include Document Annotations

5. Click the [click here to complete download](#) link in the Document(s) ready Window.

Document(s) ready

Your delivery request is complete, please click 'Open' or 'Save' when prompted.
If you are not automatically prompted to save your document, please [click here to complete your download](#).

Folder Sharing

Sharing your research with colleagues is an efficient method of working with others. Westlaw AU provides the ability to share your folders, sub folders and associated items with others within your organisation as well as view folders that have been shared with you.

Share Permissions

There are 2 permission levels that can be assigned when sharing folders; Reviewer and Contributor.

1. **Reviewer** – Read only, a reviewer can only view documents.
2. **Contributor** – The same as reviewers but can also save documents and searches to the shared folder.


My Contacts

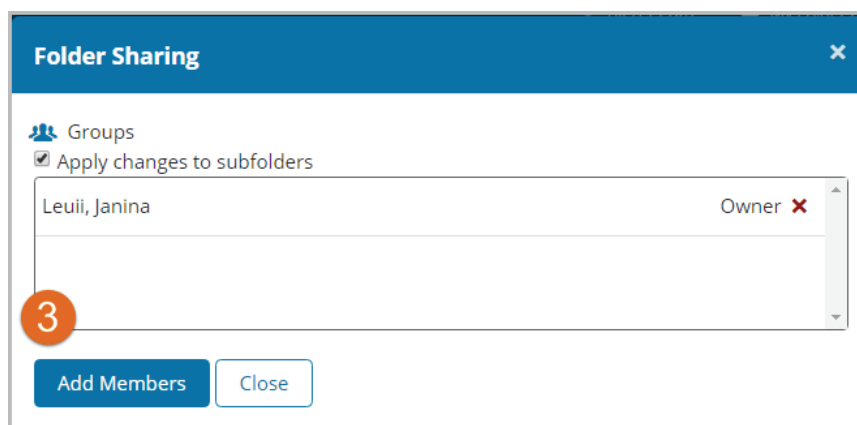
My Contacts allows you to create groups of contacts within your organisation for the purpose of folder sharing.

Share a Folder

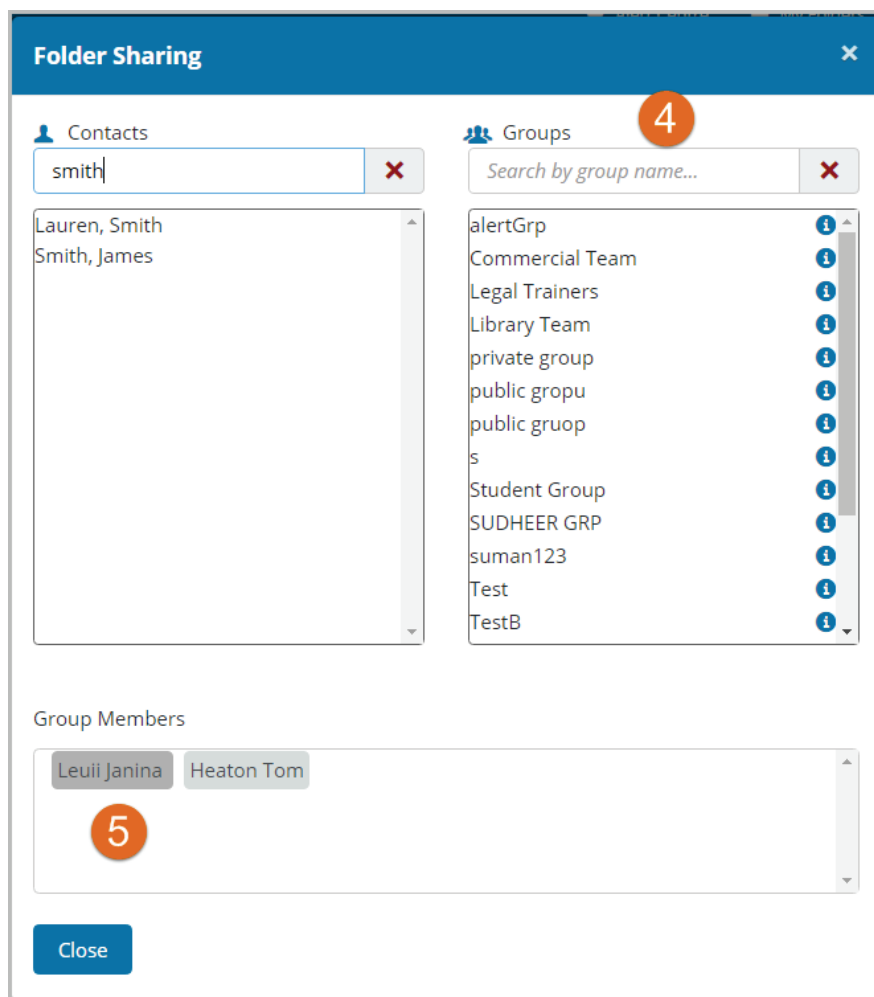
1. Go to My Folders and select a folder you want to share



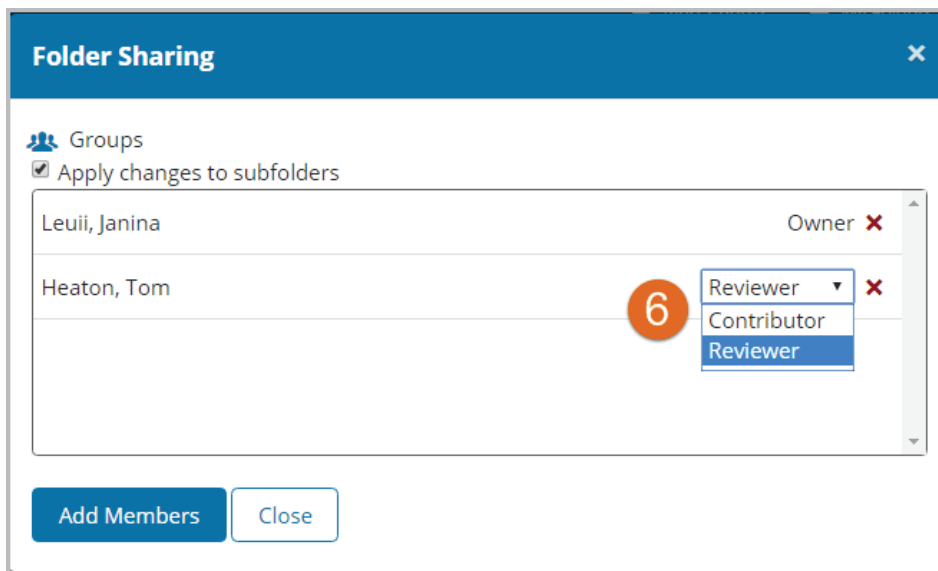
2. Click on the **Share** icon  **Share** to display the **Folder Sharing** window
If this folder has sub folders and you don't wish to grant access, untick the 'Apply to subfolders' checkbox. The default is for contacts to have access to folders and any sub folders
3. To add a new contact(s) click on the **Add Members** button



In the **Contacts** list select the contact to add. You can search for a contact by entering their name in the **Search by name** field.

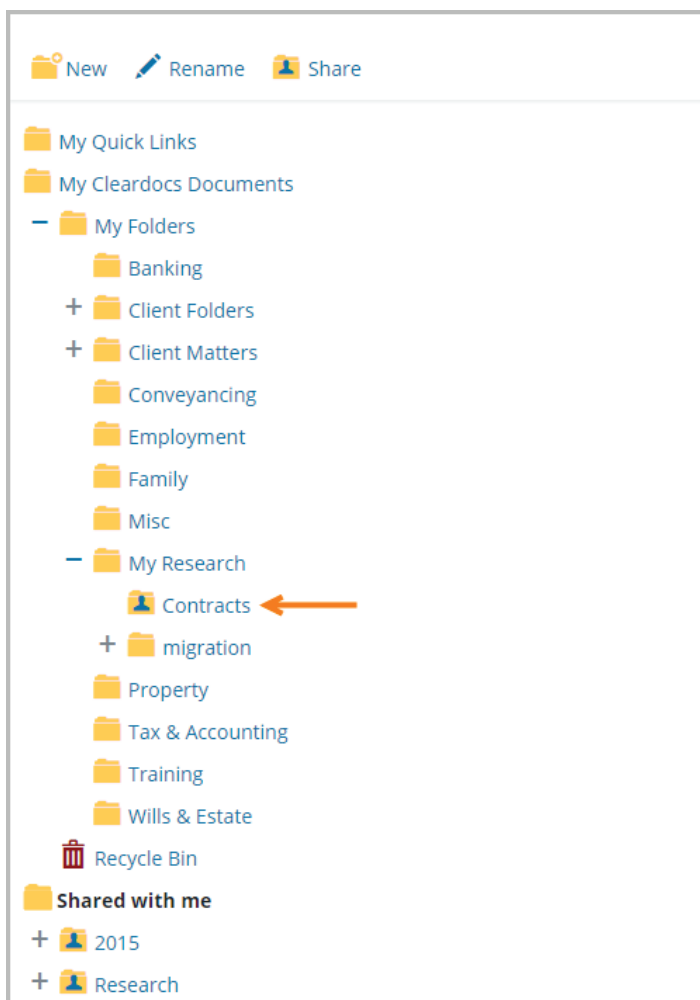


4. In the **Groups** list select the group to add. You can search for a group by entering the name in the **Search by group name** field. Refer to the My Contacts Quick Guide on managing Groups.
5. Click on the contacts name to add. This will be added to the Group Members list. Click Save & Close button to exit.
6. On the Folder Sharing window, select the **permission level** for the newly added contact ie **Reviewer** or **Contributor**.




7. Click the **CLOSE** button.

The Folder icon will now be updated to indicate this folder has been shared.



Changed Shared Permissions

1. Go to My Folders and select a folder you want to share
2. Click on the **Share** icon  to display the **Folder Sharing** window

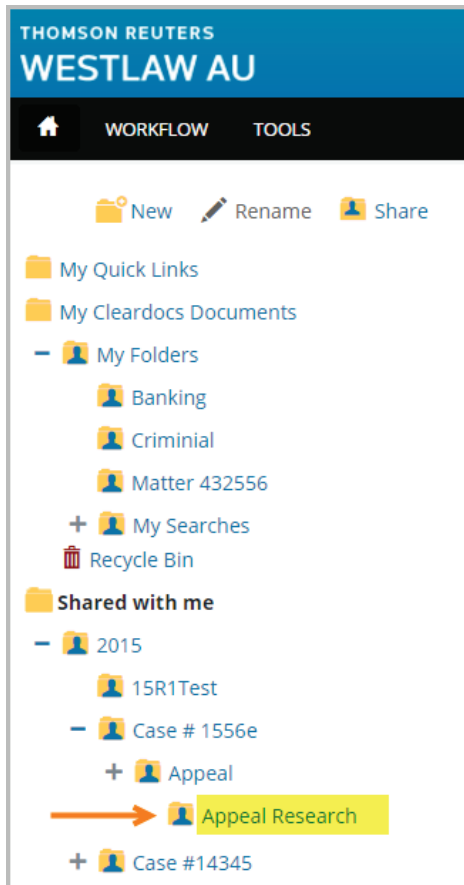
The My Contacts window will open and this will list the contacts that have access to this folder and their permission.

3. If this folder has sub folders and you don't wish to grant access, untick the Apply to subfolders checkbox. The default is for contacts to have access to folders and any sub folders
4. To edit permission select the new permission beside the contact ie Reviewer or Contributor.
5. To edit contact click on the **ADD MEMBERS** button
6. To remove contacts click on their name in the **Group Members box** located at the bottom of the window. Click the **Close** button to save and exit.
7. On the Folder Sharing screen, select the permission level for the newly added contact ie Reviewer or Contributor.
8. Click **Close**

View a Shared Folder

Folders that have been shared with you will be visible immediately. Shared folders are located under the main folder list under the Shared with me heading.

1. To view the folder and contents, click on the folder name.
2. To view Share settings, select the folder and the **Share** icon. In the Folder sharing screen, the contacts and permissions will be listed.



Note: If a folder has been shared, an additional **Added by Column** is visible so you can see who added that item.

