



REUTERS / Tobias Schwarz

# WESTLAW UK QUICKVIEW+ USER GUIDE

# USING WESTLAW UK QUICKVIEW+

## SIGNING ON

1. Go to [www.quickview.westlaw.co.uk](http://www.quickview.westlaw.co.uk)
2. Login using your Westlaw UK Username and Password, or if already registered for a OnePass account, login using your OnePass Username and Password
3. If logging in using your Westlaw UK Username and Password, you'll be prompted to register for a OnePass Username and Password. Please note, as of 1 October 2011, you will only be able to access Westlaw UK Quickview+ with a OnePass Username and Password.

Westlaw UK | Westlaw International

# QuickView+

Westlaw.uk

SIGN UP FEEDBACK

WELCOME

Westlaw UK QuickView+ is a web-based application that enables you to create customised reports of your firm's usage. Reports can be run from 48 hours after using Westlaw UK and help you track both usage as well as any charges incurred. Usage Data is available up until : **Sunday June 12**

If you have not used Westlaw UK QuickView+ before you will need to sign up. To do so, please click the **Sign Up** button above and follow the instructions on the screen.

For further assistance using this service you can download our Westlaw UK QuickView+ User Guide . Alternatively, please contact our 24/7 Westlaw UK Customer Support Team on 0800 028 2200 or at [customer.service@westlaw.co.uk](mailto:customer.service@westlaw.co.uk)

Westlaw UK QuickView is a secure site.

Please enter your Westlaw UK Username and Password

Username:

Password:

Sign On

Switch to sign on using [OnePass Username and Password](#)

4. Once you've registered for a OnePass Username and Password, this is the sign on screen you will see going forward.

Westlaw UK | Westlaw International

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Westlaw UK QuickView is a secure site.

Please use your **OnePass** login details below to sign-on.

What is OnePass?

Username [Forgot Username?](#)

Password [Forgot Password?](#)

Sign On

[Register/Edit](#) OnePass Username and Password.

Switch to sign on using a [Westlaw UK Username and Password](#)



## THE CREATE REPORT SCREEN

From this screen you can run a variety of different reports.

View the Westlaw UK QuickView+ User Guide online. You can also provide comments and feedback

Access other Westlaw UK QuickView+ tools.

Log Out of QuickView+

## GENERATING A USAGE REPORT

1. Decide whether you would like the report to cover a department or customer by selecting from the first drop-down menu.

2. Now select your **Department** or **Customer Name** from the drop-down menu.
3. **Delivery Method** - choose to **download, display** or **email** the report as well as set up an **Auto Report** (For more information see the Auto Reports section of this guide).
4. Choose which service(s) you want to run the report on from the Services drop-down menu.
5. Select the **date range** (or billing month) for your usage report by using the drop-down menus.
6. You can also choose to include **Special Offer charges**. This option enables you to see:
  - Only usage in databases included in your subscription (**Display Included Charges Only**)
  - Only usage in databases outside of your subscription (**Display Excluded Charges Only**)
  - All usage separated into included and excluded (**Separate Included/Excluded Charges**)
  - All usage totalled together (**Do NOT Separate Included/Excluded Charges**)

7. Now select your **Report Format**. This is where you can select the detail and information included in the report. There are two types of report – **Summary** and **Detail**.
  - **Summary** provides the totals for each item of data requested (eg User, Client ID and Database)
  - **Detail** provides more information for each item of data including the transaction type (search, print, etc)

You can choose to sort your report by the following items:

8. **Apply Special Pricing**. This option enables you to apportion the transactional usage charges against your subscription amount (Subscription Pricing Report).
9. Now click **Submit**.

## VIEWING THE REPORT

Callouts in the screenshot:

- Go back to Create Report page**: Points to the 'Create Report' button in the top right.
- Report options summary**: Points to the report configuration area (Department, Date Range, Report Format).
- Delivery options**: Points to the 'Download', 'E-Mail', 'View Full Printable HTML Report', and 'View Full Printable Excel Report' buttons.

The screenshot shows a report titled 'Department by Client ID by User by Day by File' with columns for Transactions, Docs, and Standard Charge. The report data is as follows:

Included	Transactions	Docs	Standard Charge
DISPLAY DOCUMENTS	2		0.00 GBP
Totals for Included	2		0.00 GBP
Totals for File UKCR-ALL	2		0.00 GBP
File UKPCRM-CRARCHBOLD			

### Filter your Report

Choose to filter your report to just show usage for a particular user(s) or Client ID(s).  
 Select more than one filter by holding down the Ctrl key, simultaneously selecting the additional filters you wish to include.  
 The filter option will depend upon the items of data you have chosen to include in your Report format.

## REPORT DISPLAY

The report is displayed in pages. Use the **First**, **Previous**, **Next** and **Last** links located at the top of the report to scroll between pages.

The four columns provide the following information:

1. The report detail – each row providing the information and data requested.
2. Transactions – giving the number of transactions (searches, browsing and finding / linking).
3. Docs – total number of documents delivered (printed, emailed or downloaded).
4. Standard Charge – the nominal charge for those transactions (displayed in GBP).

If you choose to apply **Special Pricing** an additional column will appear to show the apportioned charge.

## CUSTOMISING REPORTS

From the **Create Report** screen, you can select **Customise Report Formats** from the drop-down box in the top-right corner of the screen.

The screenshot shows the 'Create Report' screen with the following fields:

- Select Department: Test Account, LONDON (1003543973)
- Select Delivery Method: Display
- Services: All Services
- Select Date Range or Month: (Usage information is available from 01 December 2010 through 12 June 2011.)

The 'Customise Report Formats' dropdown menu is open, showing options like 'Create Report', 'Customise Report Formats', 'Manage Auto Reports', etc.

1. Select which report you would like to view or customise by selecting one on the left-hand side of screen.

The screenshot shows the 'View Selected Report Format' screen. The 'Report Format Name' is 'Pretesting Signon as a user' and the 'Report Type' is 'Detail'. The 'Sort Options' are 1, 2, 3, 4. The 'Report Totals' are 'Display' and the 'Column Headers' are 'Display'. The 'Fields' are 'Day', 'User Name', 'TimeKeeper ID', and 'TimeKeeper Grouping'. The 'Description' is 'Day', 'User', 'Services', 'Database Information'. The 'Subtotals' are 'Standard Charge'. The 'Fields' are 'Day', 'User Name', 'TimeKeeper ID', 'TimeKeeper Grouping'. The 'Description' is 'Services', 'Database Information', 'Transactions', 'DocLines'. The 'Subtotals' are 'Standard Charge'. The 'Fields' are 'Day', 'User Name', 'TimeKeeper ID', 'TimeKeeper Grouping'. The 'Description' is 'Services', 'Database Information', 'Transactions', 'DocLines'. The 'Subtotals' are 'Standard Charge'.

The 'Report Formats' list on the left includes:

1. My Customised Report
2. Pretesting Signon as a user
3. Detail - Department
4. Detail - Department by Client ID
5. Detail - Department by Client ID by Day
6. Detail - Department by Client ID by User
7. Detail - Department by Client ID by User by Day
8. Detail - Department by Client ID by User by Day by Database
9. Detail - Department by Day
10. Detail - Department by User

2. Give your new Report a name
3. Select whether you would like a **Summary** or **Detail** report
4. Sort the Order of how you'd like the information to appear.
  - As you select the Orders, you will see extra fields appear to the right.
  - Choose whether you would like to **Display Subtotals** for all or some of the criteria you have selected.
5. You can choose to
  - a) **Display Report Totals**
  - b) **Display Column Headers**
  - c) **Display Transactions, DocLines or Standard Charge**
6. Click **Submit** and you will be taken to a screen where you can view and edit the selections made earlier.

**View Selected Report Format:**

<b>Report Format Name:</b>	Detail - Department by Client ID by User by Day by Database		
<b>Report Type:</b>	Detail		
<b>Sort Options:</b>	<b>Sort Order</b>	<b>Description</b>	<b>Subtotals</b>
	1	Department	Display
	2	Client ID	Display
	3	User	Display
	4	Day	Display
	5	File	Display
	6	Database Information	Display
<b>Report Totals:</b>	Display		
<b>Column Headers:</b>	Display		
<b>Fields:</b>	Department #	File	
	Client ID	Database Information	
	User Name	Transactions	
	Contact ID	Doc/Lines	
	Day	Standard Charge	
	<input type="button" value="COPY"/>	<input type="button" value="NEW"/>	

Once complete, your newly created report can be found in the **Create Report** screen under the **Select Report Format** drop-down menu.

The screenshot shows the 'Create Report' screen in the QuickView+ system. The page is titled 'Report Options' and contains several form fields for configuring a report:

- Select Department:** Test Account, LONDON (1003543973)
- Select Delivery Method:** Display
- Services:** All Services
- Select Date Range or Month:** Usage information is available from 01 December 2010 through 12 June 2011. Select Begin Date: 01 June 2011, Or, Select Month: No Month Selected (Use Date Range), Select End Date: 12 June 2011.
- Select Special Offer Charges to Display:** Separate Included/Excluded Charges
- Select Report Format:** My Customised Report (dropdown menu is open)
- Apply Special Pricing:** (empty)

The dropdown menu for 'Select Report Format' is open, showing a list of report types:

- My Customised Report
- Pretesting Signon as a user
- Detail - Department
- Detail - Department by Client ID
- Detail - Department by Client ID by Day
- Detail - Department by Client ID by User
- Detail - Department by Client ID by User by Day
- Detail - Department by Client ID by User by Day by Database
- Detail - Department by Day
- Detail - Department by User
- Detail - Department by User by Client ID
- Detail - Department by User by Client ID by Day
- Detail - Department by User by Client ID by Day by Database
- Detail - Department by User by Day
- Detail - Department by User by Day by Database
- Summary - Department
- Summary - Department by Client ID
- Summary - Department by Client ID by Day
- Summary - Department by Client ID by User
- Summary - Department by Client ID by User by Day
- Summary - Department by Day
- Summary - Department by User
- Summary - Department by User by Client ID
- Summary - Department by User by Client ID by Day
- Summary - Department by User by Day

## CREATING CUSTOMER GROUPS

You can run usage reports for various (or all) departments by creating different customer groups.

Report Options

**Create Report:**  
To begin, enter either a new Department number in the text box or select a Department or Customer from the drop down list below.

Department  Customer

Enter Department:

Select Department:

Select Delivery Method:

Select Date Range or Month: (Usage information is available from 01 April 2009 through 13 October 2009.)  
Select Begin Date:  Or Select Month:   
Select End Date:

Select **Customise Customers** from the drop-down menu in the top right-hand corner of the screen.

To create a new **customer group** click the **New** button located at the top of the report.

Use the **Edit**, **Copy** or **Delete** buttons to make changes to any existing customer groups.

**Customers**

Select Customer to View or Customise:

**Customers**  
2 Customers

1\_ Steph  
2\_ Testing

**View Customer:**

Customer Name: \_\_\_\_\_ Step# \_\_\_\_\_

Name	Address	Department
SMG CUSTOMER STEFANIE LONDON WC1V 6RR	1003538101	
SMG CUSTOMER STEFANIE LONDON WC1V 6RR	1003538102	
SMG CUSTOMER STEFANIE LONDON WC1V 6RR	1003538103	
SMG CUSTOMER STEFANIE LONDON WC1V 6RR	1003538165	

## VIEWING YOUR REPORT HISTORY

View a list of all the usage reports you have **Emailed**, **Printed** and **Downloaded** by selecting **View Online Report History** from the drop-down menu in the top right-hand corner of the screen.

Within this report you can view each Report by selecting the relevant hyperlink.

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**Report History**

**View Online Report History:**

Online Report Name	Status	Execution Date
> <a href="#">Online Report History</a>		
> <a href="#">Auto Report History</a>		
> Online Display For ia744cc0400000117a746bd5b071971d2	Completed	16/10/2009 6:17:59 AM CST
> Online Display For ia744cc0400000117a746bd5b071971d2	Completed	16/10/2009 5:47:24 AM CST
> Online Display For ia744cc0400000117a746bd5b071971d2	Completed	13/10/2009 10:22:00 AM CST
> Online Display For ia744cc0400000117a746bd5b071971d2	Completed	13/10/2009 8:10:30 AM CST
> Online Download For ia744cc0400000117a746bd5b071971d2	Completed	13/10/2009 4:19:18 AM CST

## SETTING USER DEFAULTS

Choose the **Set User Defaults** option from the drop-down menu in the top right-hand corner to set your defaults for:

- The report specifications displayed when you sign on
- Delivery options
- Auto Report options

Westlaw.uk

**USER - ACCESS, QUICKVIEW**

- Create Report
- Manage Assigned Departments
- Customise Customers
- Manage Auto Reports
- Manage TimeKeeper Information
- Set User Defaults**
- View Online Report History

Westlaw UK | Westlaw International

QuickView+ Set User Defaults  HELP Westlaw UK

USER GUIDE | FEEDBACK LOG OUT

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**User Defaults** Set User Defaults:

Select Customer / Department:

Display Name 2 and Name 3:  Yes

Select Query Range:

Select Report Format:

Select Delivery Method:

Select Special Offer Charges:

Apply Special Pricing:  Yes

---

Select Download File Format:

Select Download File Delimiter: (Only used with Delimited Download File Format)

---

E-Mail Compressed File:  Yes

---

Enter Auto Report E-Mail Address:

Select Auto Report Delivery Method:

Select Auto Report Frequency:

## ADDING TIMEKEEPER INFORMATION

By default, each Westlaw UK user within your account is assigned a user ID based on their password and this is displayed as part of the usage report.

You can change the TimeKeeper IDs to match identification numbers used within your internal system. By entering or uploading TimeKeeper IDs, you can create a customised report that automatically includes these IDs in your usage reports.

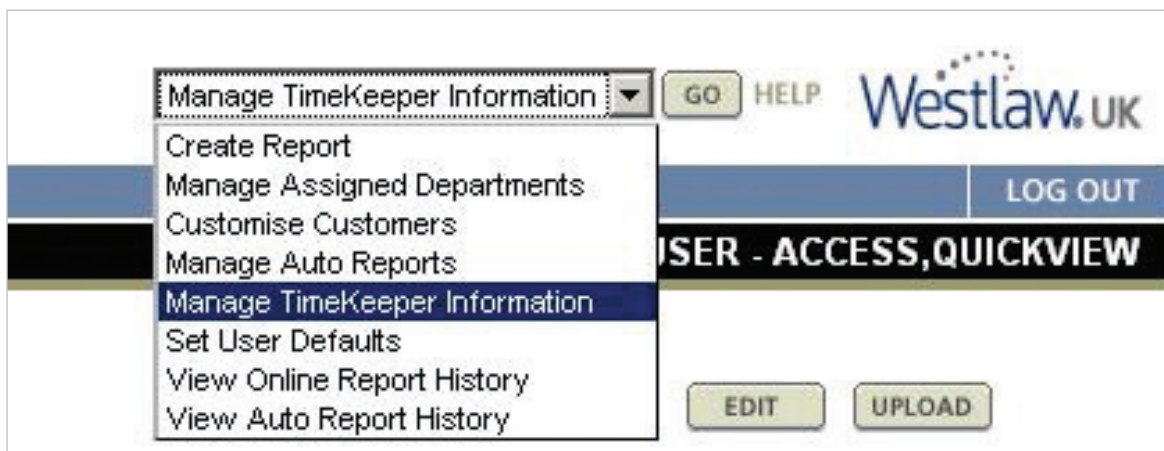
TimeKeeper information includes:

- **TimeKeeper IDs** - the identification number your firm/organisation has assigned to each Westlaw UK user
- **TimeKeeper Groupings** - the group to which TimeKeeper IDs have been assigned

To change the TimeKeeper IDs, select **Manage TimeKeeper Information** from the drop-down menu in the top right-hand corner of the screen.

A list of all your users within each department will be displayed. Move between departments by using the drop-down menu at the top of the screen.

To add your own IDs and TimeKeeper Groups click **Edit** and then **Upload** to automatically upload your list.





## AUTO REPORTING

The Auto Report function enables you to receive **automatically generated** usage reports by **email** each **day/week/month**.

You can set up as many Auto Reports as you need and email these to multiple recipients. Recipients receive the entire report so do not necessarily have to access Westlaw UK Quickview+ themselves.

To set up an Auto Report, please refer to **Generating a Usage Report** within this user guide, selecting Auto Report as your delivery method for step 3.

Select Auto Report Frequency:	<input type="text" value="Daily"/>
Select Auto Report Delivery Method:	<input type="text" value="E-Mail"/>
Enter Report Name:	<input type="text"/>
Select Format:	<input type="text" value="Excel Format (.xls)"/>
Select Delivery Method Options:	
Enter E-Mail Address:	<input type="text"/>
Compress File:	<input type="checkbox"/> Yes
Enter Password for File:	<input type="text"/>

The following further options will appear:

- Select Frequency
- Select Delivery Method
- Enter Report Name
- Select Format of the report and delimiter
- Enter the email address(es) of the recipients
- Choose whether to compress the file (it is worth compressing the file if you have any issues with large email files being accepted through your internal firewall)
- Enter a password for the file if you would like it password protected

Once you click Submit, your report will be saved.

To **amend**, **delete** or **change** your Auto Reports select **Manage Auto Reports** from the drop-down menu in the top right-hand corner of the screen.





Your Auto Reports are listed on the left-hand side of the screen. Click the number of the report to view the details.

You can now select to **Edit, Copy, Delete**, or create a **New Auto Report**.

To view all of the Auto Reports you have been sent, click **View Auto Report History** from the drop-down menu.

The screenshot displays the Westlaw QuickView+ interface. At the top, there are navigation links for 'Westlaw UK' and 'Westlaw International'. The main header includes the 'QuickView+' logo, a search bar with 'View Auto Report History' entered, and a 'GO' button. Below the header, there are links for 'USER GUIDE', 'FEEDBACK', and 'LOG OUT'. The main content area is titled 'Report History' and 'Auto Report History:'. On the left, there are links for '>> Online Report History' and '>> Auto Report History'. The main content area displays details for an auto report named 'UK Academics Excluded Usage'. The details include: Frequency: Weekly beginning on Sundays; Customer: UK Academics; Query Dates: Begin Date: 04/10/2009, End Date: 10/10/2009; Execution Date: 12/10/2009 11:00:54 AM CST; Current Status: Completed; Delivery Method: E-Mail to Address: ruth.goff@thomsonreuters.com, michael.francis@thomsonreuters.com; Report Format: Detail - Department by User by Day; Special Offer Charges: Display Excluded Charges Only; Special Pricing: No; Download Format: Spreadsheet Format (.dif). There are 'RETURN' buttons at the top right and bottom right of the report details.

**For more information or guidance call Customer Support:**

Call **0800 028 2200**, email [customer.service@westlaw.co.uk](mailto:customer.service@westlaw.co.uk) or visit [westlaw.co.uk](http://westlaw.co.uk)