REUTERS / Tobias Schwarz

# WESTLAW UK
# QUICKVIEW+ USER GUIDE

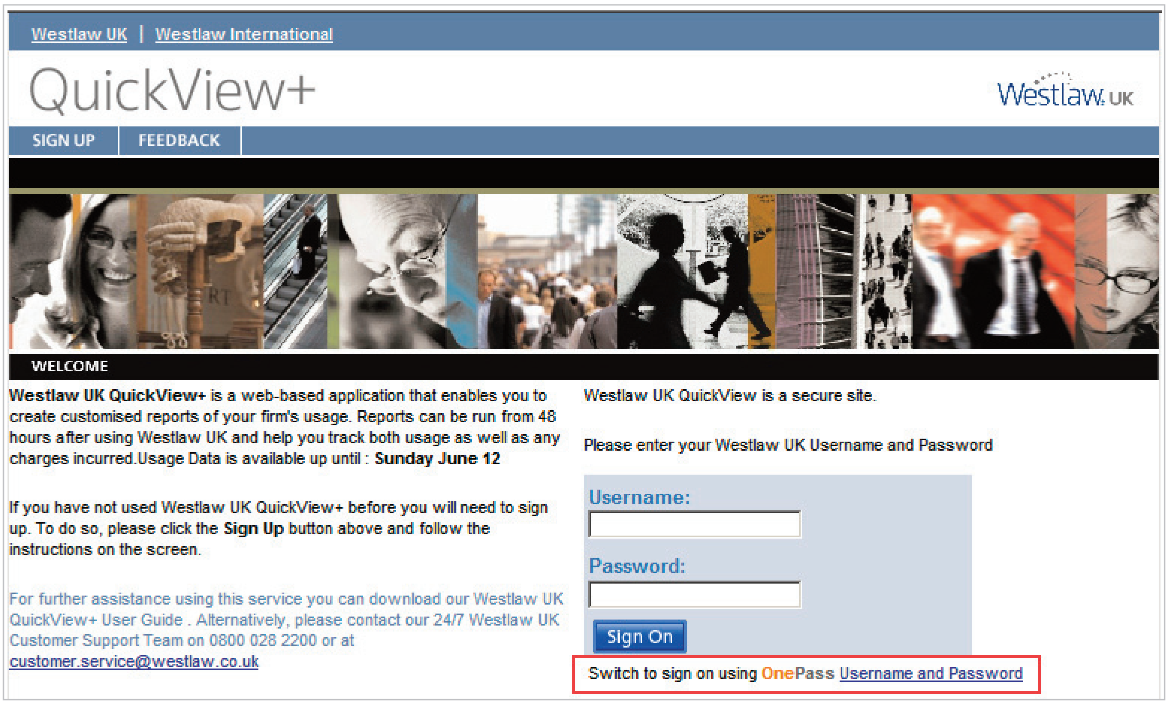
Westlaw UK

THOMSON REUTERS™

# USING WESTLAW UK QUICKVIEW+

## SIGNING ON

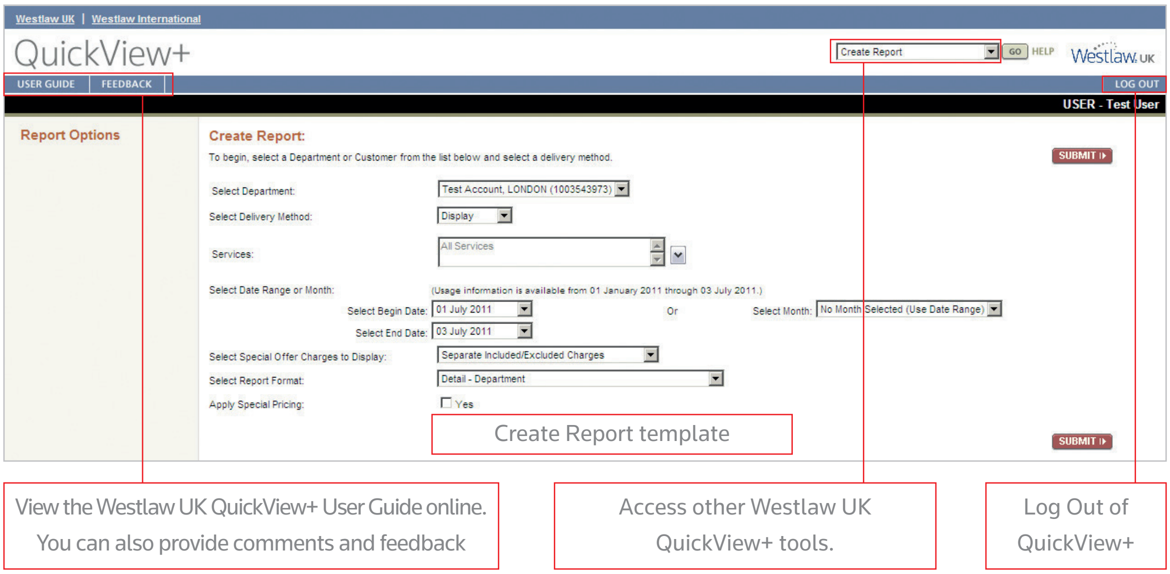
1. Go to **www.quickview.westlaw.co.uk**
2. Login using your Westlaw UK Username and Password, or if already registered for a OnePass account, login using your OnePass Username and Password
3. If logging in using your Westlaw UK Username and Password, you'll be prompted to register for a OnePass Username 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.




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

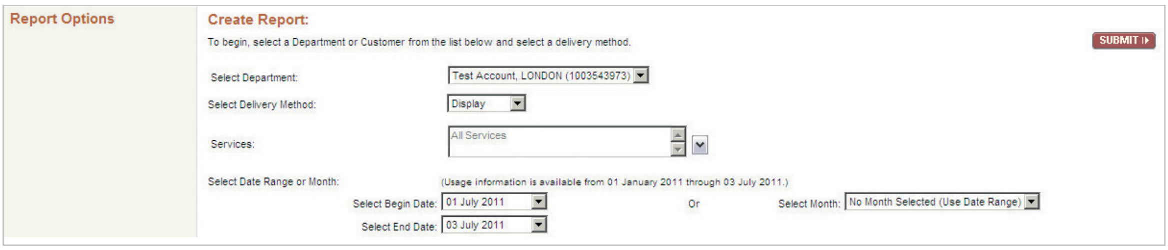
## THE CREATE REPORT SCREEN

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

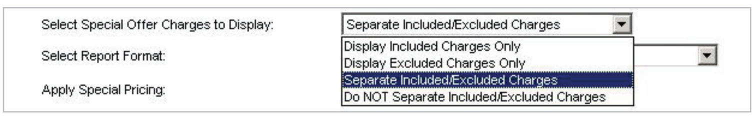



## GENERATING A USAGE REPORT

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)**

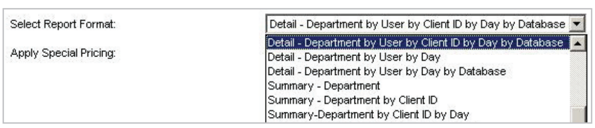



7. Now select your **Report Format**. This is where you can select the detail and information included in the report. There are two types of report – **Summary** and **Detail**.

- **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)

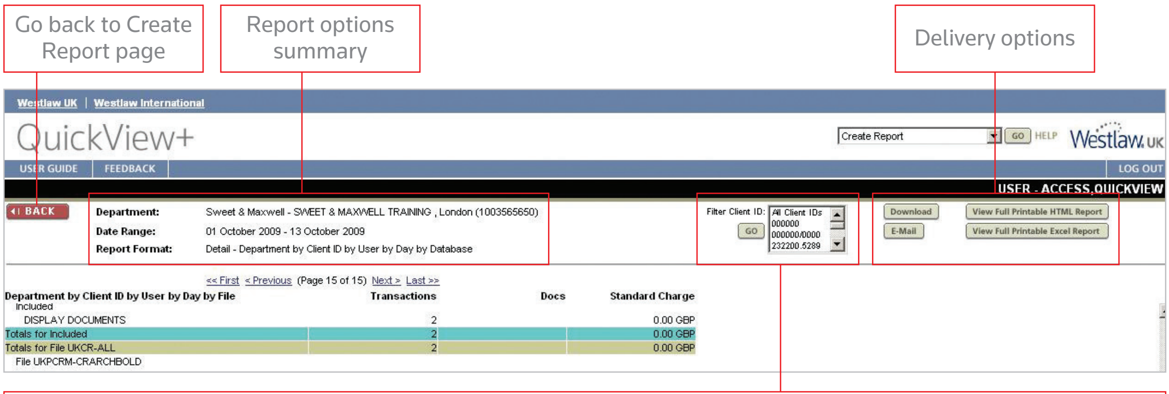
You can choose to sort your report by the following items:

- **User**
- **Client ID**
- **Day (Date)**
- **Database**




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




**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.

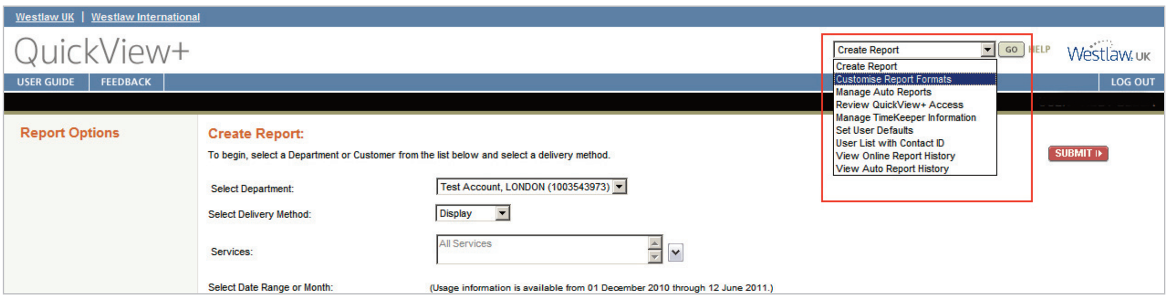
The four columns provide the following information:

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).

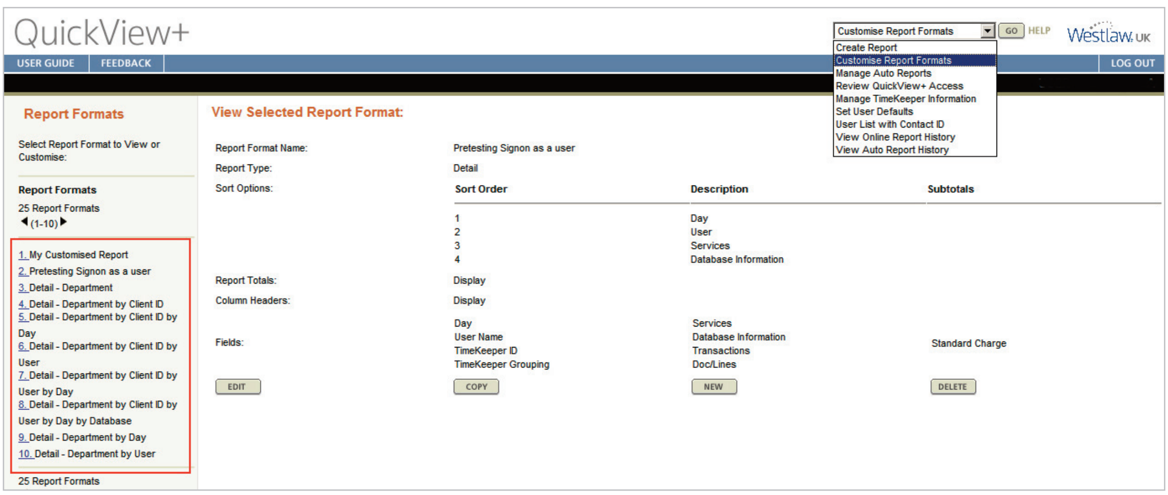
If you choose to apply **Special Pricing** an additional column will appear to show the apportioned charge.

## CUSTOMISING REPORTS

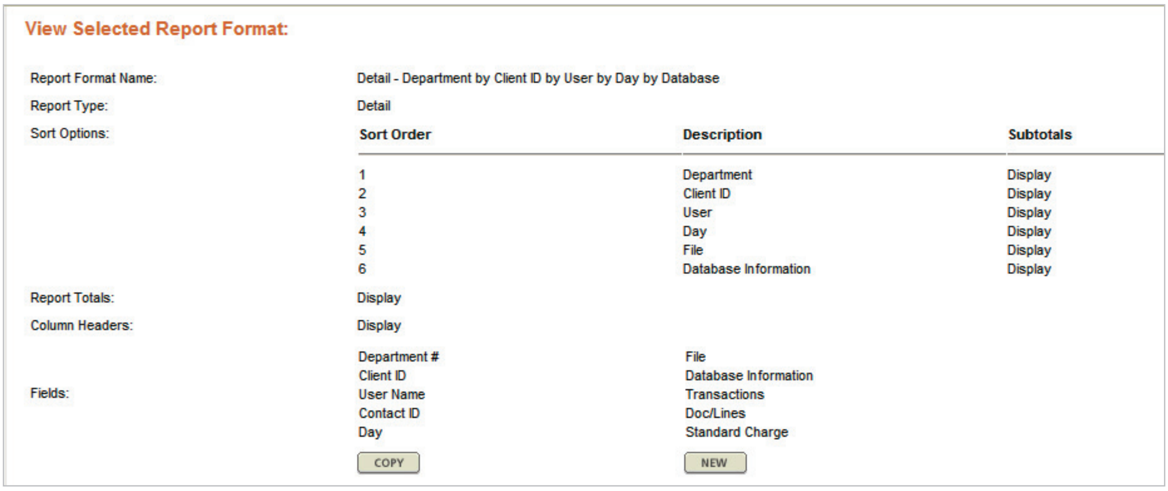
From the **Create Report** screen, you can select **Customise Report Formats** from the drop-down box in the top-right corner of the screen.



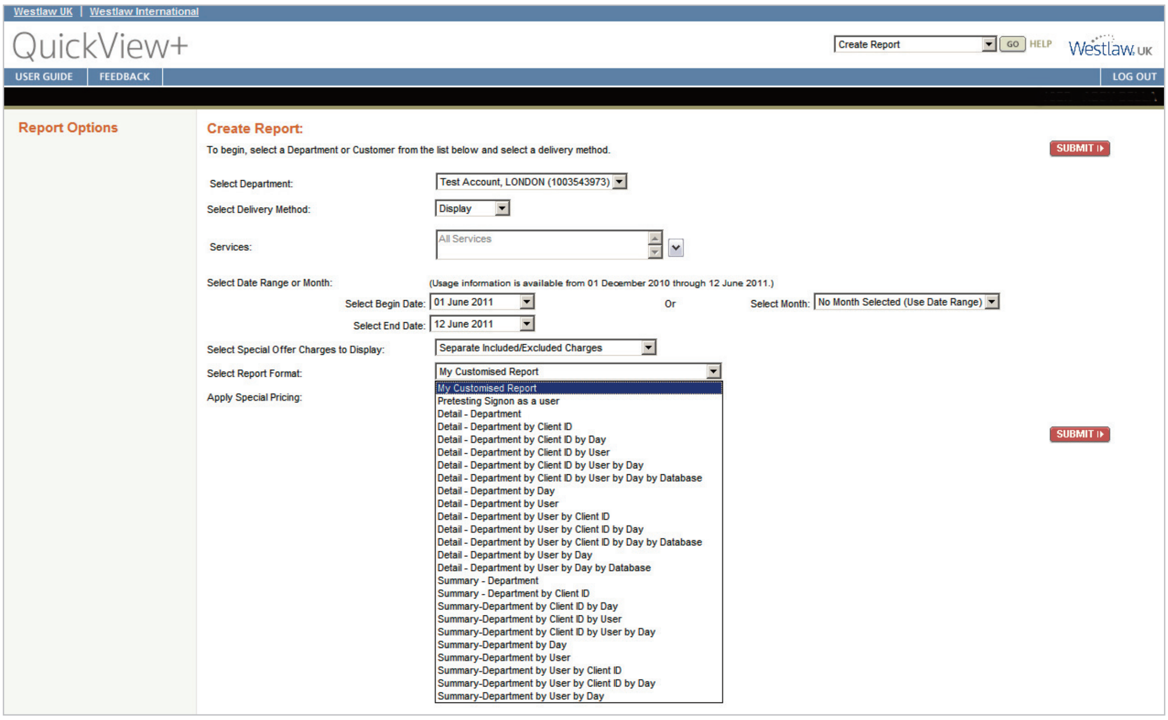

1. Select which report you would like to view or customise by selecting one on the left-hand side of screen.



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.

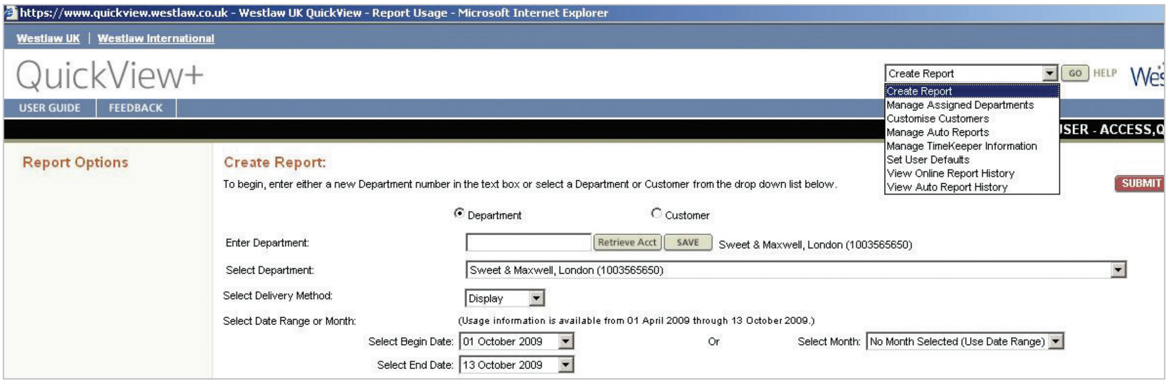



Once complete, your newly created report can be found in the **Create Report** screen under the **Select Report Format** drop-down menu.



## CREATING CUSTOMER GROUPS

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




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

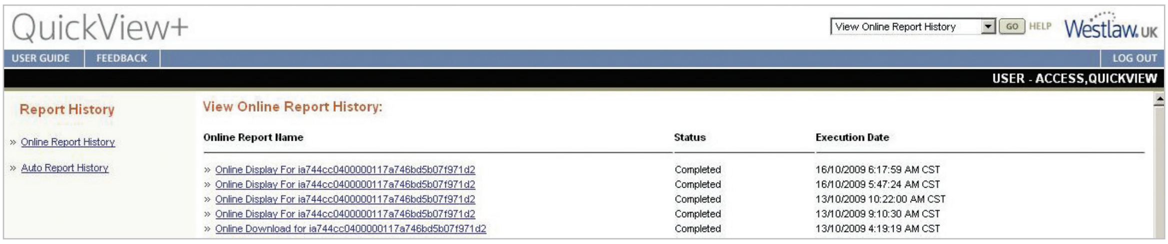
To create a new **customer group** click the **New** button located at the top of the report.

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


## 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.

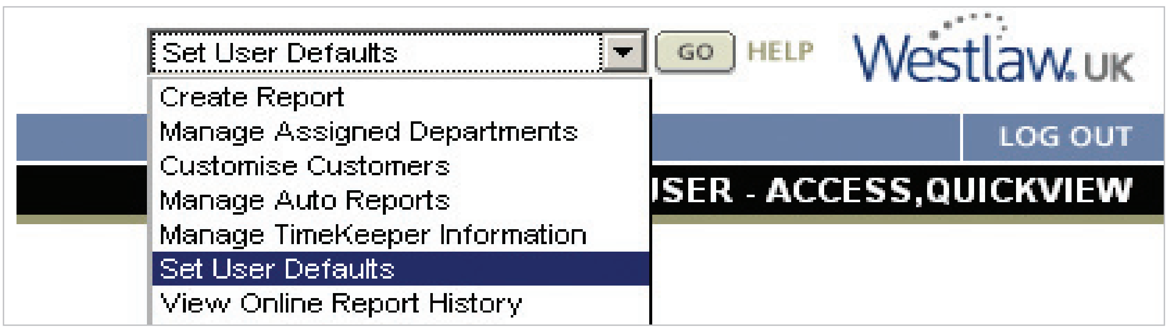
Within this report you can view each Report by selecting the relevant hyperlink.

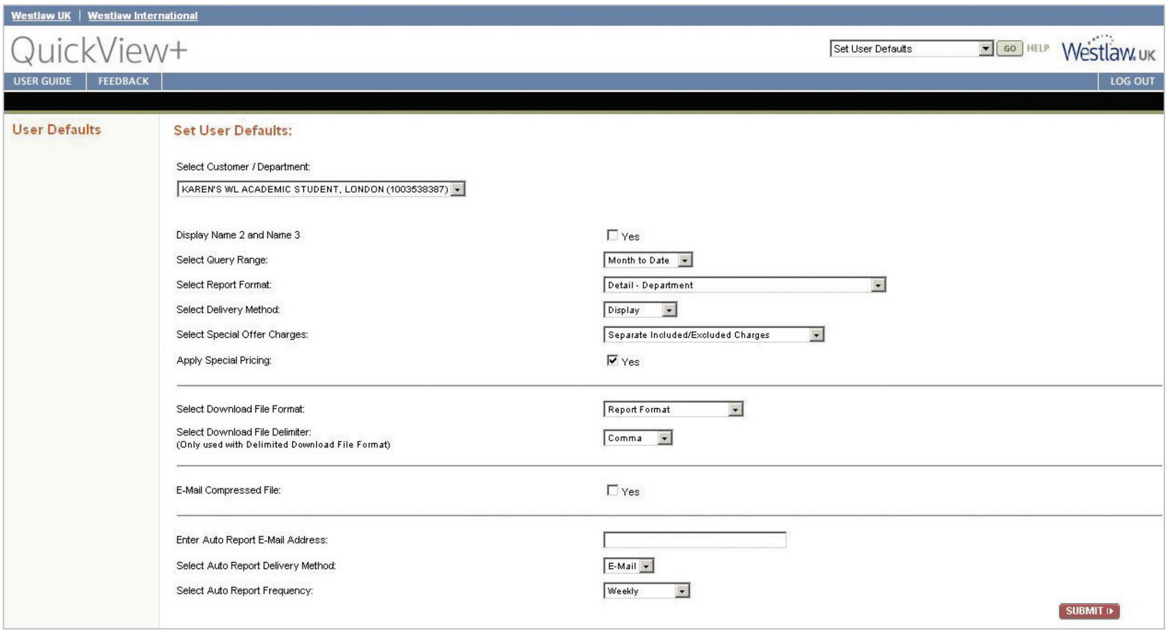



## SETTING USER DEFAULTS

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






## 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.

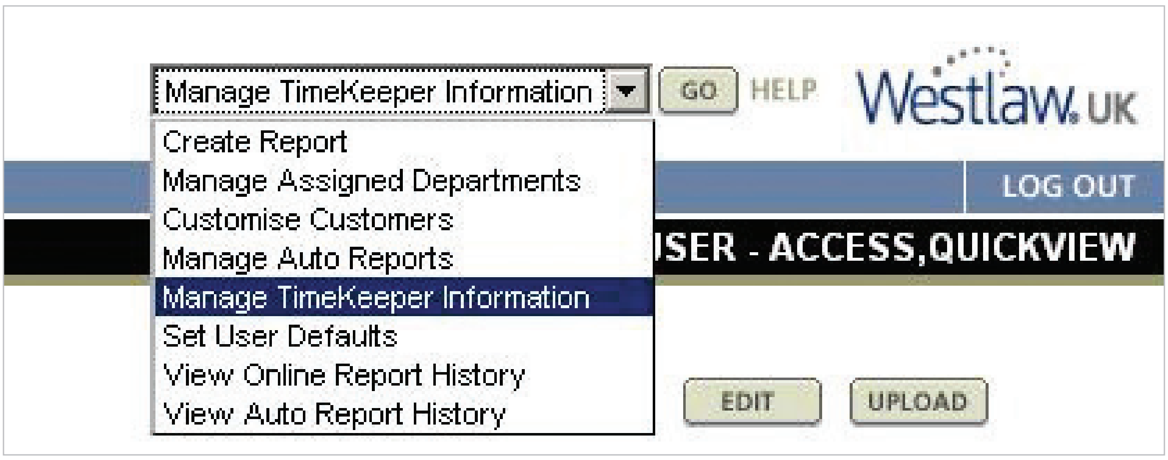
TimeKeeper information includes:

- **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.

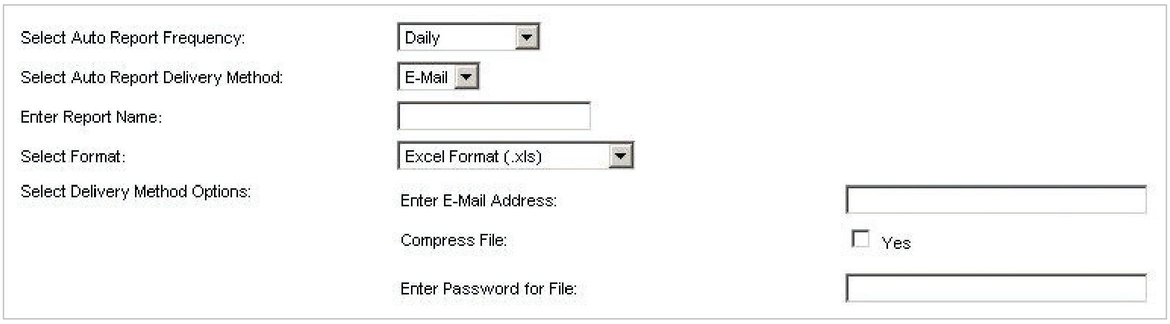


## AUTO REPORTING

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.




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.


**For more information or guidance call Customer Support:**
Call **0800 028 2200**, email **customer.service@westlaw.co.uk** or visit **westlaw.co.uk**