WESTLAW EDGE

USING FOLDERS TO ORGANIZE YOUR WESTLAW EDGE RESEARCH

Westlaw Edge provides you a way to organize, manage, and share your research when you store documents or snippets of text in folders. You can share the research in your folders across departmental and organizational boundaries like never before—with instant access to shared documents from any computer.

Organize and manage your research by storing documents and snippets of text in folders that are easily accessible from anywhere on Westlaw Edge.

Accessing Folders

Folders can be accessed by clicking the **Folders** button at the top of any page. Click a **folder name** to quickly view the contents of that folder or click the **View all** link to manage all of your folders on the My Research page.

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You can also click the **Folders** tab near the bottom of the Home page. Click the **View all documents** button to manage all of your folders on the My Research page.

History Folders	Favorites Custom Pages
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Delta Litigation	Ledbetter v. Goodyear Tire & Rubber Co., Inc. U.S. • May 29, 2007 • 550 U.S. 618
	View all documents



Saving Documents and Text in a Folder

SAVING DOCUMENTS FROM A RESULT LIST

To save documents from a Result list, select the check boxes next to the documents you want to save and click the **Save to Folder** () icon. Select the folder in which you want to save the documents and click **Save**. A confirmation message is displayed.

SAVING THE DOCUMENT YOU ARE VIEWING

To save the document you are viewing, click the **Save to Folder** (**D**) icon on the document toolbar. Select the folder in which you want to save the document and click **Save**. A confirmation message is displayed.

SAVING SELECTED TEXT

To save selected document text to a recent folder, select the text you want to save and select **Save to Folder** from the drop-down menu, and then select the folder to save the text to. A confirmation message is displayed.



Viewing Saved Documents and Text

To view the documents or text saved in your folders, click **Folders** and then click the **View all** link at the top of any page. A list of your folders is displayed on the Folders page. Click the folder containing the items you want to view. A list of items is displayed in the right column.

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Search within this folder	Paul J. SMITH, Plaintiff, v. TRIDEX CORPORATION and Progressive Software, Inc., Defendant.	Trial Court Documents	12/19/2018

FILTERING BY ITEM TYPE OR CONTENT TYPE

When you are viewing the items in a folder on the Folders page, you can filter the items by item type, content type, or annotated notes (items that have highlighted portions, have notes, or are not annotated). Under Filter Results in the left column, select the appropriate check box under *Type, Content Type,* or *Annotated Documents*. The list will filter automatically. Turn the Select multiple slider on to apply multiple filters without automatically narrowing the list. You can also search the documents in a folder for particular terms. Enter the terms in the *Search within this folder* field and click Search.

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Managing Folders

On the Folders page, you can click **New** to create a new folder or click **Options** to perform one of the following tasks:

- copy or move a folder
- rename a folder
- delete a folder
- export documents from a folder or to Amazon Kindle
- share a folder

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CREATING A NEW FOLDER

On the Folders page, click **New** to display the New Folder window. Enter a name for the new folder in the *Folder Name* field, select a location for the folder, and click **OK**.

You can also create a new folder while viewing a document or a result list. After clicking the **Save to Folder** icon, click **New Folder** to display the New Folder window. Enter a name for the new folder in the *Folder Name* field, select a location for the folder, and click **OK**.

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To add a note to a folder, click the **Add Note** button. A field will appear. Enter your note, and then click **Save**. To edit the note click the **Edit** button. Make the appropriate changes, and then click **Save**.

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MOVING OR COPYING A FOLDER

To move or copy a folder to a different folder, select the folder you want to move or copy. Then, complete the following:

- 1. Select *Move* or *Copy* from the *Options* drop-down. The Move Folder or Copy Folder window is displayed.
- 2. Select the folder to which you want to move or copy the folder.
- 3. Click Move or Copy. A message is displayed indicating that the folder has been moved or copied.

Moving or Copying an Item to Another Folder

To move or copy an item from one folder to another, first select the items, and then click the **Save to Folder** button. The Save Items To window appears. Select the destination folder, and then click the **Copy** button to copy the items to that location, or click the **Move** button to move the items to that location.

RENAMING A FOLDER

To rename a folder, select the folder you want to rename and select *Rename* from the *Options* menu. The Rename Folder window is displayed. Enter the new name for the folder in the *Folder Name* field and click **OK**.

DELETING A FOLDER

To delete a folder, select the folder you want to delete and select *Delete* from the *Options* menu. The Delete Folder window is displayed. Click OK to delete the folder. The primary folder, which is the folder that is present when you first use Westlaw Edge, cannot be deleted. The default name for the primary folder is "[Your Name]'s Research."

Note: All items in the folder, including subfolders, are deleted when you delete a folder.

Deleting an Item in a Folder

To delete a document or snippet, click the folder you want to delete items from. Then, select the check boxes next to the items you want to delete and click the **Delete** icon.

EXPORTING DOCUMENTS FROM A FOLDER

To export documents from a folder to your computer, complete the following:

- 1. On the Folders page, choose **Export** from the Options menu. The Export window is displayed.
- 2. Select the check boxes next to the folders from which you want to export documents and click **Next**.
- 3. Choose one of the following options from the What to Deliver section in the Export window:
 - List of Items to download a list of the documents in the folders
 - Documents to download the full text of the documents in the folders
 - *Documents and My Annotations* to download the full text of the documents plus any annotations you made to the documents.
- 4. Select a *Format* from the drop-down list.
- 5. If you select *Documents* in the What to Deliver section, select *A Single Merged File* or *Multiple Files* (*zip*) from the *As* drop-down list.
- 6. Click the Layout and Limits tab, if available, and select the check boxes for the elements you want to include in the documents, e.g., *West Headnotes*.
- 7. Click the Content to Append tab, if available, and select the check boxes for the content you want to append to the documents, e.g., *List of all Negative Treatment*.
- 8. Click **Export**. When the Ready to Download window is displayed, click **Download** and then click **Open** or **Save**.

You can also export documents from a folder to Amazon Kindle.

Additionally, the **Delivery Method** button in the toolbar on the right allows you to email, print, and download selected items as well as download them to Dropbox or Kindle.

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Sharing a Folder

Folder sharing gives everyone a way to contribute to and draw from a growing repository of valuable knowledge. When you can easily tap into the collective knowledge of the entire team from any computer, tablet, or mobile device, research can take minutes instead of hours.

Note: Folder sharing may vary by law firm and organization. Contact your firm administrator with questions or for assistance.

To share a folder, complete the following:

- 1. Click the name of the folder or subfolder you want to share. If you choose a folder containing subfolders, you have the option of sharing the subfolders, as well.
- 2. Click the **Share** folder icon (**a**) on the toolbar to display the Share window.

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3. To share the folder with a person or group within your organization, enter a name in the field and select the name of the person or group with whom you want to share the folder from the displayed list. The person or group you selected is now displayed in the Share window. To share the folder with a Westlaw Edge user outside of your organization, type a valid email address for the person.

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You can also click **Contacts** to display the Contacts window and select the people or groups within your organization with whom you want to share the folder. Then click **Insert** to display the people or groups you selected in the Share window.

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Filter results	Account 42 User 2					
Search within this folder	Insert Add note	Cancel				

4. After all of the people and groups with whom you want to share the folder are listed in the Share window, click **Continue**.

Note: If you are sharing with people outside of your organization, you will be asked to provide your email address. Enter your email address in the field and click **Continue**.

- 5. A list of the people and groups you selected is displayed under *Shared With* on the left side of the Share window; their roles are displayed on the right side. You are considered the *Owner* of the folder. As the owner, you decide which persons or groups have access to the folder and what level of access each person or group has.
 - **Contributors** can add documents or snippets of text to the folder and create subfolders. They can also move or remove any documents that they saved in the folder.
 - **Reviewers** can view documents and snippets of text but cannot add their own documents or share the folder with others.

The owner is the only one who can add or remove contributors or reviewers, or end the folder sharing. Select *Contributor* or *Reviewer* from the drop-down under *Roles* for each person. Click the X next to a person or group to remove that person or group from the shared folder.

Note: A Pending icon will be displayed next to the names of external people until they accept your invitation and you confirm their acceptance.

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6. Click **Share**. A message is displayed confirming that the folder has been shared with internal users or groups and that invitations have been sent to external individuals. The folder graphic for the shared folder changes to blue and the heading displays the number of people and groups with which the folder is shared. The people you shared your folder with can now see all of the documents and snippets of text on their Westlaw Edge account. Folders that other Westlaw Edge users have shared with you are displayed under *Shared with Me* on this page.

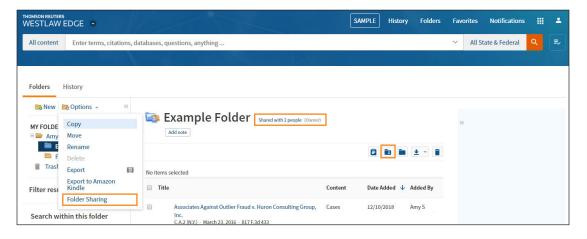
Receiving a Shared Folder: External Users

Individuals outside of your organization are invited to share a Westlaw Edge folder via email message. The invitee must click **View Invitation** in the email message, then sign on to Westlaw Edge and either accept or decline the invitation. If the invitation is accepted, a confirmation message is displayed in Westlaw Edge and an email message is automatically sent to you as the folder owner. You must click **Confirm/Deny** in the email message, sign on to Westlaw Edge and an email message notifying the invitee that you have confirmed the folder sharing will be sent automatically.

The external person can now access the shared folder on Westlaw Edge.

Managing a Shared Folder

The folders you share with others are displayed on the Folders page under My Folders. To change the roles of the people or groups, add or remove contributors and reviewers, or end the folder sharing, first select the folder or subfolder. Then, click the **Share** folder icon (a) on the toolbar, select **Folder Sharing** from the Options drop-down list, or click the **Shared with** link to display the Folder Sharing window.



Managing and Copying Documents in a Shared Folder

Any new documents or snippets added to a shared folder are clearly labeled as newly added and all documents in shared folders are continually updated by KeyCite[®].

If you are a reviewer or contributor to a shared folder, you can copy the content in the folder and save it as your personal, unshared folder, thereby ensuring your continued access to the documents in the folder. This is important when there is a possibility that the Westlaw Edge password of the folder owner may expire; for example, if the owner leaves the employ of an organization. Since the maintenance of all folders, including shared folders, are tied to an owner's password, a folder will expire when the owner's password expires.

To save the documents in a shared folder to a folder you own, complete the following:

- 1. Open the shared folder.
- 2. Select the check box next to the title for each document you want to save or select the check box next to *Title* at the top of the list to select all of the content in the folder.
- 3. Click the Save to Folder icon () on the toolbar to display the Save To... window.
- 4. To copy the content from the shared folder to the folder of your choice, click the name of the folder in which you want to copy the content and click **Copy**.

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Charges for Sharing Folders

SHARING FOLDERS WITHIN YOUR ORGANIZATION

There is no charge to share a folder within your organization. Documents and text in a shared folder may be accessed at no charge for 12 months after the initial chargeable view by any individual within the organization with whom the folder is shared.

SHARING FOLDERS ACROSS ORGANIZATIONS

There is no charge to share a folder with people outside an organization. Outside the organization, an initial chargeable view occurs the first time a document is viewed; it is charged according to the Westlaw Edge subscription plan of the person viewing the document. There is no charge for subsequent views within the following 12 months by anyone within an organization with which the folder is shared.

LOOKING FOR MORE INFORMATION?

Westlaw Edge is available on the Web at westlaw.com/edge.

For assistance using Westlaw Edge, call the Insight Attorneys at 1-800-REF-ATTY (1-800-733-2889).

For free reference materials, visit legalsolutions.com/edge-training.

