QuickView+ Quick Tips
for Solo and Small Law Firms

QuickView+® is the free Westlaw® cost-recovery and reporting service designed exclusively for Westlaw customers. It allows you to easily track Westlaw usage and charges to help better manage your firm's online research costs.

Getting started

TIP 1

Signing up

It's as easy as 1 – 2 – 3!

Here's how:

1. Go to QuickView.com
2. Click on **Sign Up** tab
3. Complete form and submit

Within two business days, you'll have access to your Westlaw information via QuickView+.

NOTE
Your pop-up blocker must be set to allow QuickView+ screens to display.

TIP 2

Logging on

Just like logging on to Westlaw.

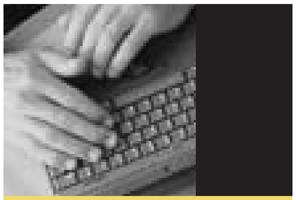
Here's how:

1. Go to QuickView.com
2. Enter your Westlaw password and click **GO**

You now have access to the many valuable features of QuickView+.

Sign Up tab

Log on



Creating and printing a report

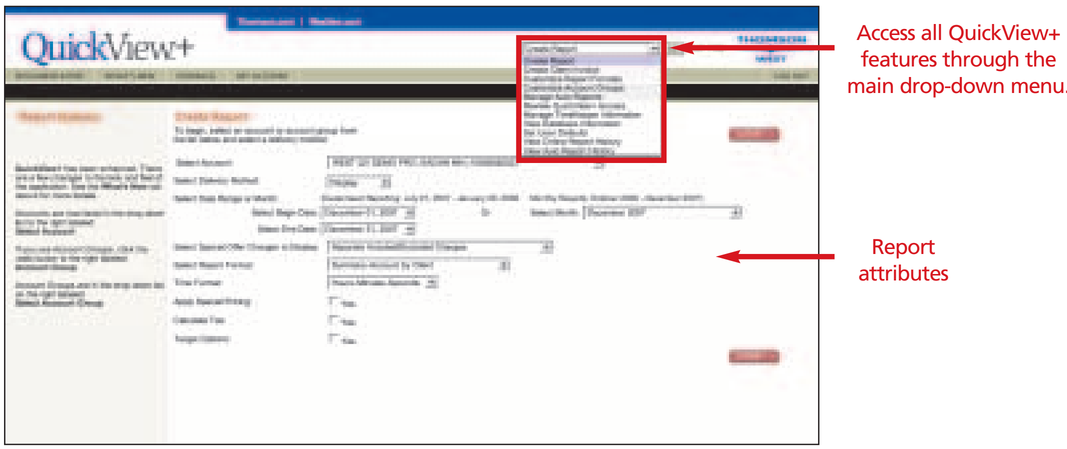
TIP 1

Create a QuickView+ report

Use it to monitor your Westlaw usage information.

Here's how:

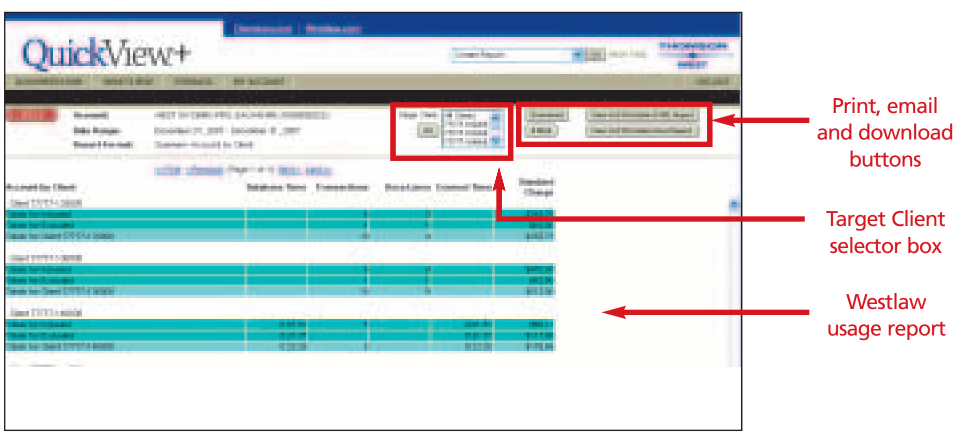
1. In the main drop-down menu, select **Create Report**
2. Select **Date Range or Month**
3. Select **Special Offer Charges to Display**: choose **Separate Included/Excluded Charges**
4. Select **Report Format**: choose **Summary-Account by Client**
5. **Time format**: choose **Hours-Minutes-Seconds**
6. Make sure three boxes for **Apply Special Pricing**, **Calculate Tax**, and **Target Option** are NOT checked
7. Submit



TIP 2

Print, download or email your QuickView+ report

Once your report has run, buttons will appear in the upper right of the screen. To print, download or email your report, simply click on the appropriate button.



TIP 3

View all Westlaw usage done on behalf of any specific client

An individual Client Summary Report can be used to substantiate the Westlaw charges billed to a specific client.

Here's how:

1. Create a Westlaw usage report (see Tip 1)
2. Choose any client in the **Target Client** selector box and click the **GO** button (repeat to view Westlaw usage for any of your clients)

Managing your Westlaw costs

TIP 1

Review Westlaw usage at a database level for a specific client or user

Use this feature to substantiate a Westlaw charge.

Here's how:

1. In the main drop-down menu, select **View Database Information**
2. Select **Date Range Type** and **Usage Date**: this will allow you to analyze by day, month or month-to-date
3. Select **Sort Options**: choose **Client** or **Westlaw User**
4. Select **Special Offer Charges to Display**: choose which charges you want displayed
5. Submit

TIP 2

Monitor ancillary costs

Create an Excluded Usage Report to keep tabs on costs incurred outside your Westlaw contract.

Here's how:

1. In the main drop-down menu, select **Create Report**
2. Select **Date Range or Month**
3. Select **Special Offer Charges to Display**: choose **Display Excluded Charges Only**
4. Select **Report Format**: choose **Summary-Account by User by Day**
5. Make sure three boxes for **Apply Special Pricing**, **Calculate Tax**, and **Target Option** are NOT checked
6. Submit

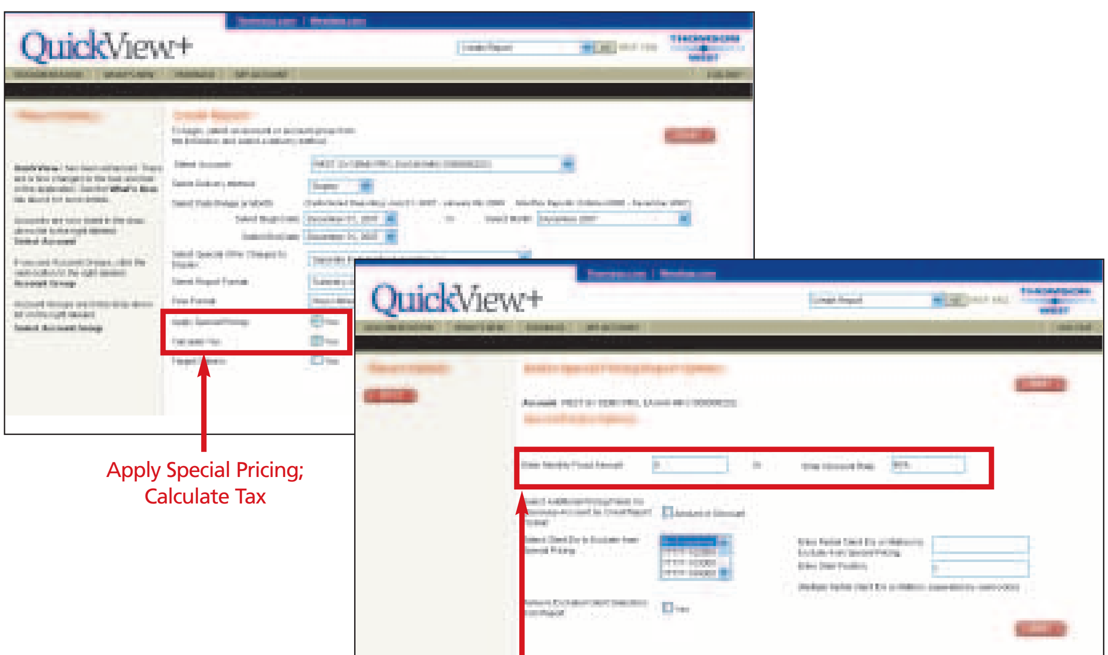
TIP 3

Allocate Westlaw costs among all your firm's clients

An easy way to simplify your billing process.

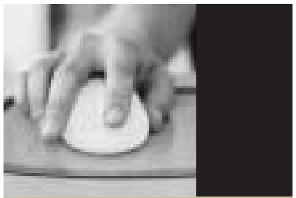
Here's how:

1. In the main drop-down menu, select **Create Report**
2. Select month
3. Select **Special Offer Charges to Display**: choose **Separate Included/Excluded Charges**
4. Select **Report Format**: choose **Summary-Account by Client**
5. Check **Apply Special Pricing** box and **Calculate Tax** box (if applicable)
6. Submit
7. On **Special Pricing Report Options** page: enter a monthly fixed amount or a discount rate
8. Submit



Apply Special Pricing; Calculate Tax

Enter a monthly fixed amount or a discount rate



Other great ways to get the most out of QuickView+

NOTE

Each month the auto report will be sent to all addresses in the email address field. Auto reports will begin the first month following set-up. To edit or add members to the email list, choose **Manage Auto Reports**, click **Edit**, then make changes.

TIP 1

Receive Westlaw usage information automatically

The Auto Report feature allows you to have your QuickView+ reports automatically sent directly to your email inbox as frequently as you desire.

Here's how:

1. In the main drop-down menu, select **Manage Auto Reports**
2. Click **New** button
3. Select **Auto Report Frequency** ("Monthly" is recommended for cost recovery purposes)
4. Select **Auto Report Delivery Method**: choose **E-Mail**
5. Enter **Report Name** (example: Westlaw Monthly Usage)
6. Select **Format**:
   - **Report Format** – readable
   - **Spreadsheet Format** – to further manipulate the data
7. Select **Delivery Method Options**:
   - Enter an email address to where the report will be sent (you may enter multiple email addresses, separated by a semicolon)
   - Uncheck the **Compress File** box
   - Never enter a password for emailed reports
8. Select **Special Offer Charges to Display**: choose **Separate Included/Excluded Charges**
9. Select **Report Format**: choose any report format (**Summary-Account by Client by Day** report format is useful for cost recovery purposes)
10. Submit

TIP 2

Review Westlaw passwords within your firm

Now you have a way to verify whether newly hired attorneys have an active Westlaw password. By leveraging this QuickView+ feature regularly, you can also ensure a terminated employee isn't leaving your firm with an active Westlaw password.

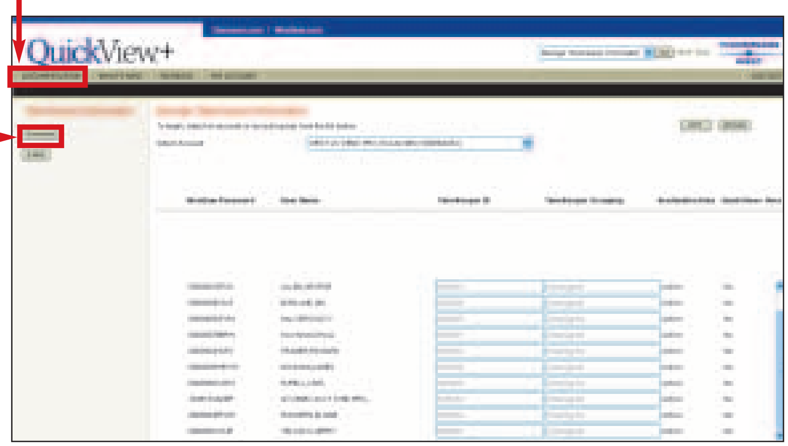
Here's how:

To view all of your employees with Westlaw passwords:

1. In the main drop-down menu, select **Manage TimeKeeper Information**
2. To print the list:
   - Click the **Download** button
   - Select format: choose **Report Format**
   - Submit
   - Click **Download** button

If a Westlaw user leaves your firm, call 1-800-WESTLAW (1-800-937-8529) to have password inactivated.

Documentation tab



To print the list, first you must download the information.

Use the QuickView+ Online User Guide (available through the **Documentation** tab) to learn more about other valuable QuickView+ features that will help you manage your Westlaw usage.

For more information about QuickView+, call 1-800-328-0109 to schedule a brief session with a member of the West Account Management team.

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