WESTLAW FORM BUILDER

How to create and manage matters

The Clients feature helps you organize clients and matters, share your work with others in your firm, company and organization, and view in progress or completed documents.

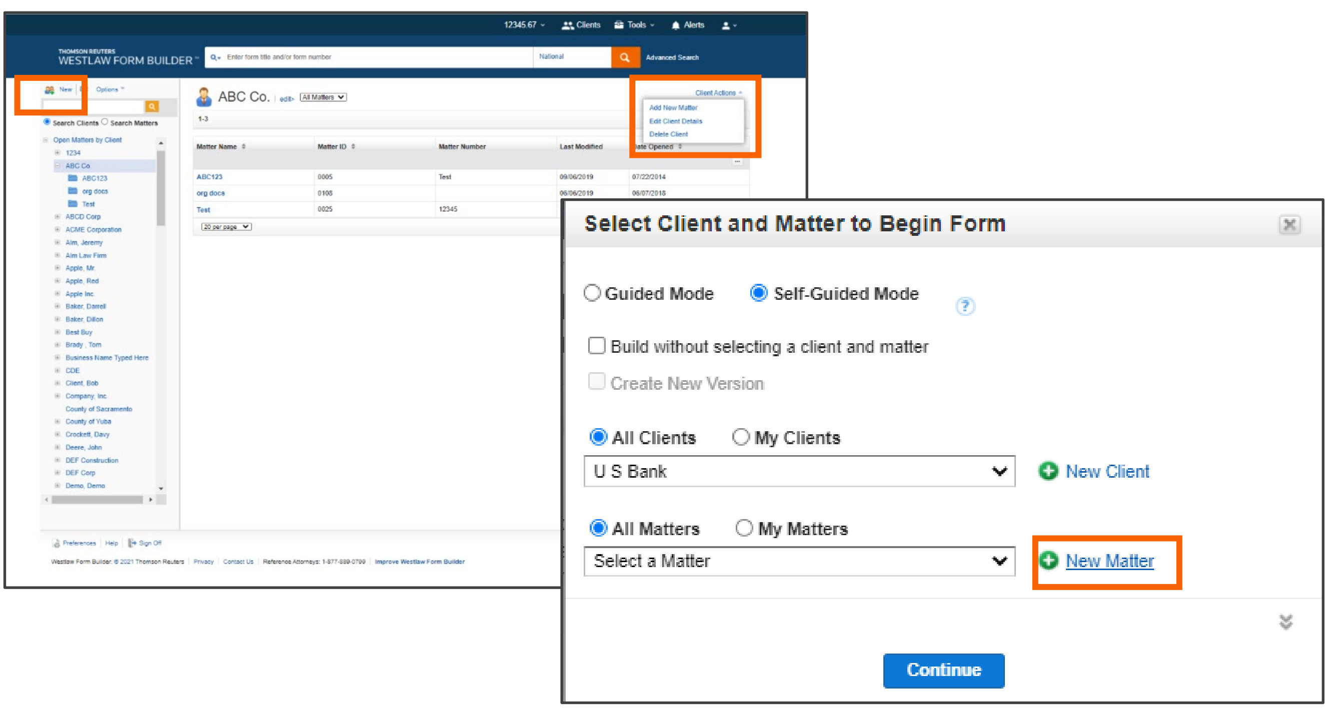
To jump to a specific section of this guide, please select a hyperlink:

Creating a New Matter

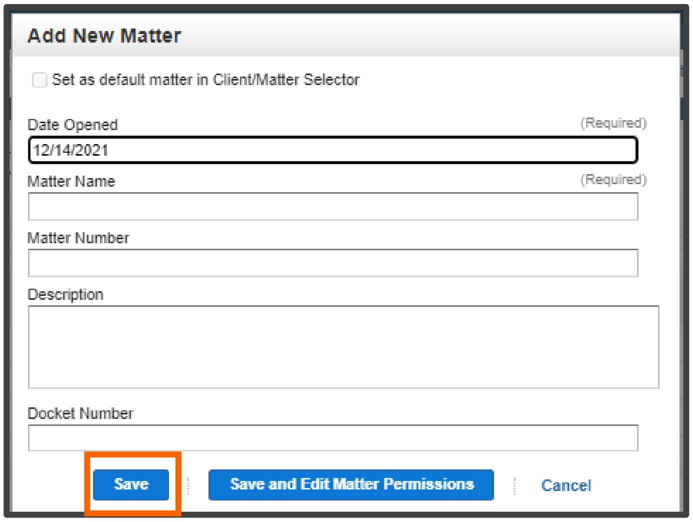
In Form Builder, there are two different ways to create a matter.

- From Clients, access the client page of the client you would like to create a matter for, and select the **New** button in the upper left or right arear of the page.

- From the Select Client and Matter to Begin form, select the **New Matter** button next to the matter drop-down menu.

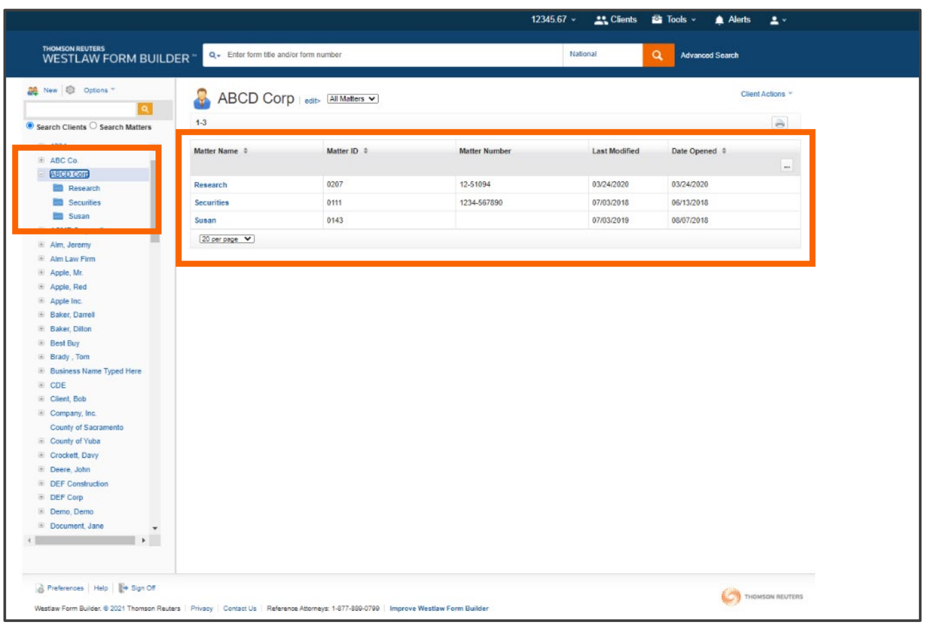


An Add New Matter lightbox appears. Fill in the fields. You must include the Date Opened and the Matter Name. Select **Save** when you are finished.

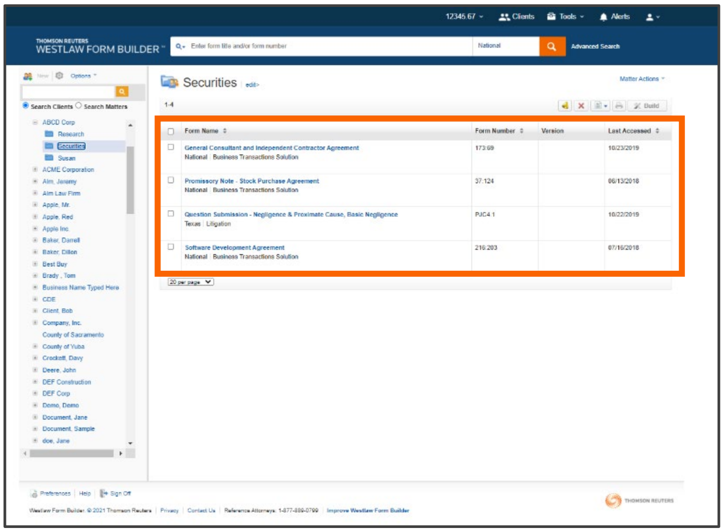


Viewing the Matter Page

Once you create a matter, a matter page will be created in Clients. Access this page by navigating to the client page in Clients. Next, select the **plus** button next to the client's name in the left pane and select the **Matter Name**.



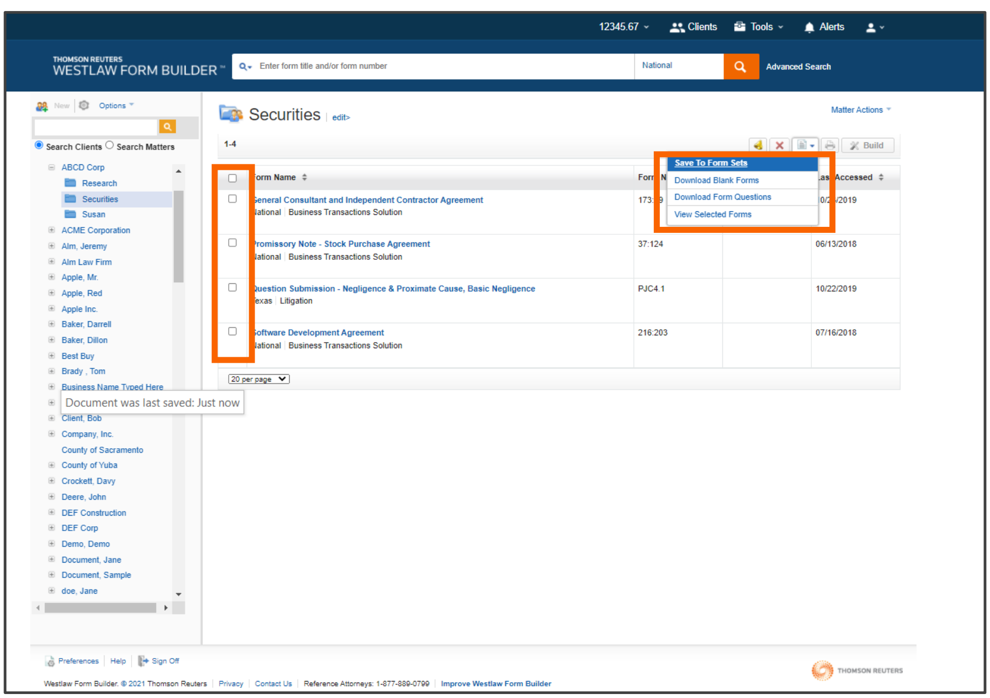
The matter page displays all forms that have been built for the matter, as well as the Form Number for editorially maintained forms, the Form Version (if two or more versions exist), and the date the form was Last Accessed.



Additionally, this page provides functions for these forms that are similar to the results page when you browse or search for forms. They are located on the right side of the matter page header bar.

For each function, you must first select the forms you would like by selecting the **check boxes** preceding the form titles or select the **Select all** check box to select all results of the page. Then select:

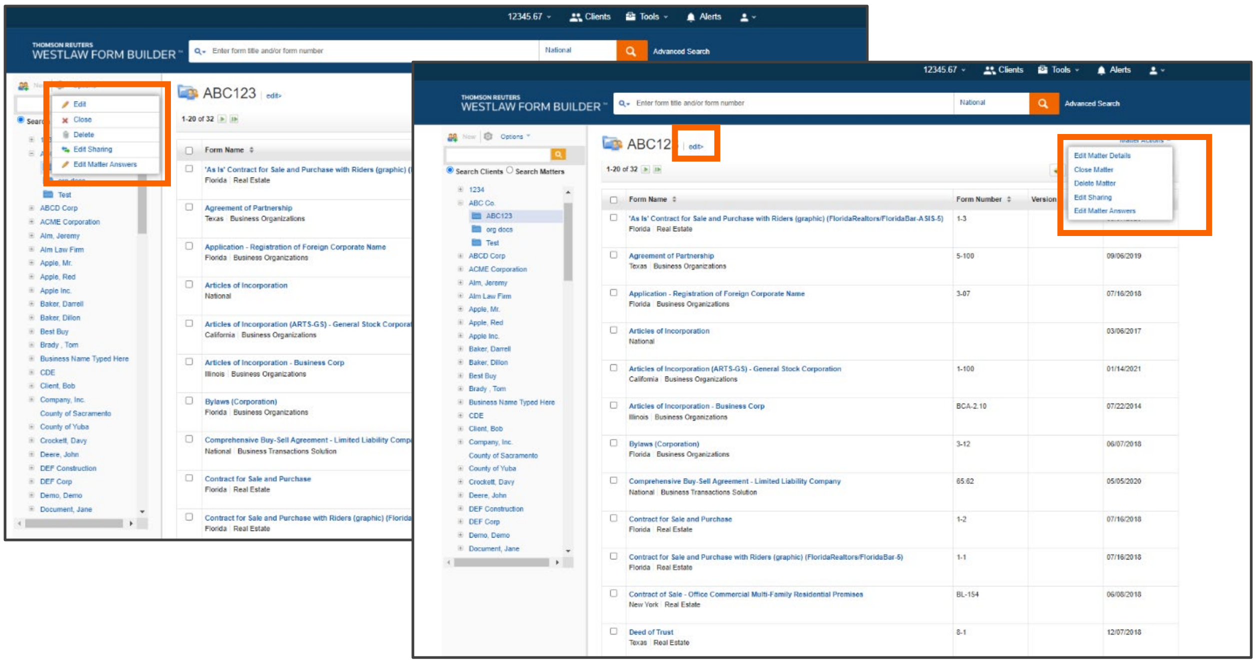
- Download Blank Forms
- Download Form Questions
- View Selected Forms



Editing a Matter

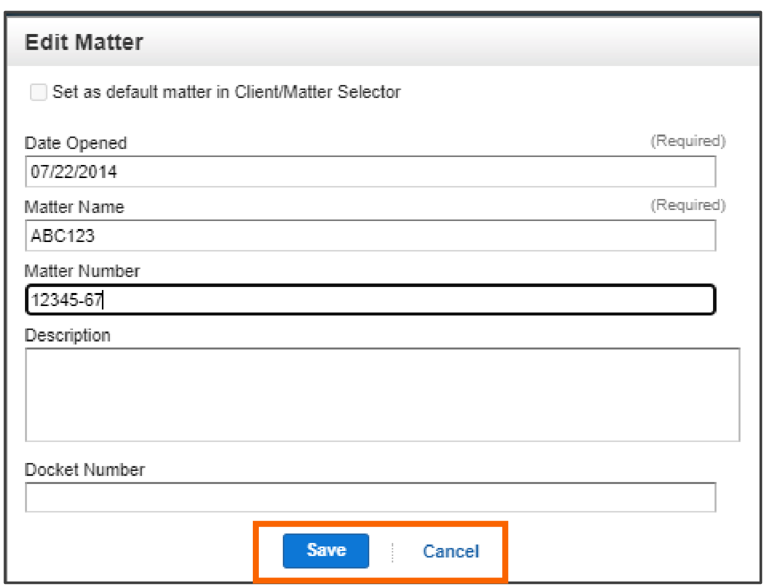
To edit a matter, access the matter page in Clients. Select either:

- The **Options** drop-down arrow in the search on the left and select **Edit**,
- The **edit** button next to the matter name on the right, or
- the **Matter Actions** drop-down arrow on the far right and select **Edit Matter Details.**



In all cases, an Edit Matter lightbox (identical to the Add New Matter lightbox) will appear.

Make any changes and **Save or** select **Cancel** to close the lightbox without changes.

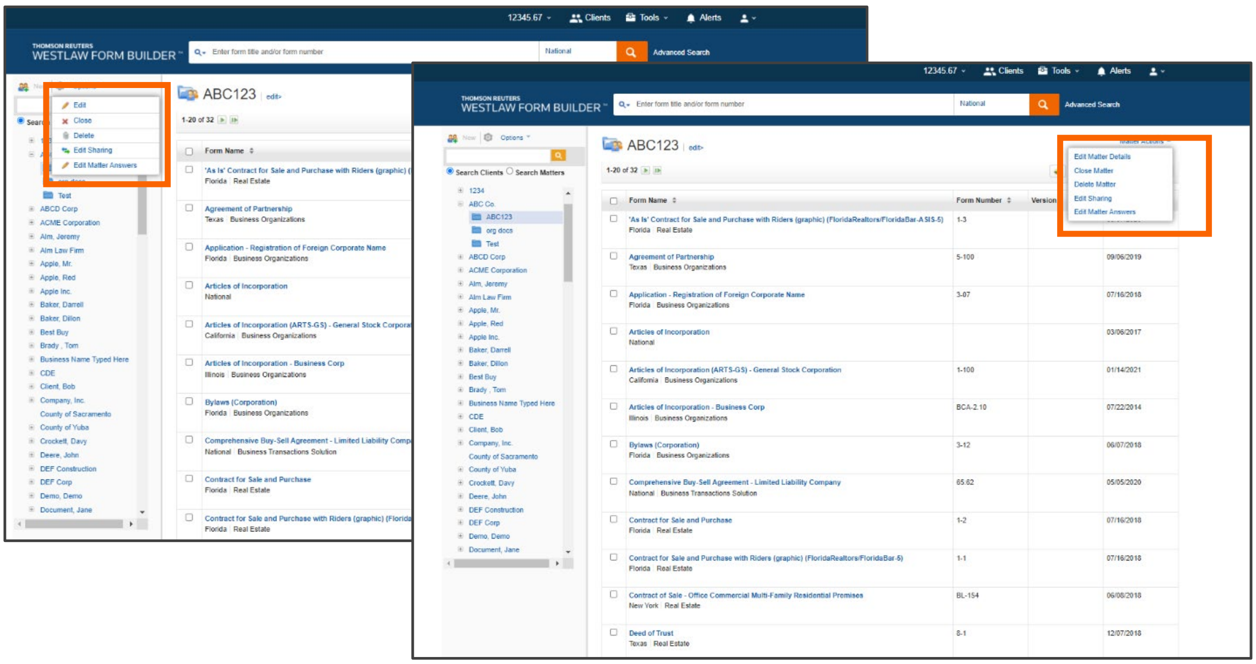


Closing a Matter

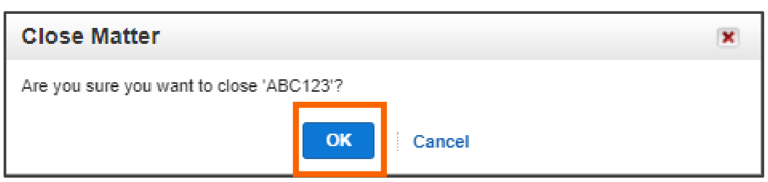
Once you have finished all tasks for the matter, closing the matter will signify to the firm, company or organization that all work pertaining to the matter is complete. If you subscribe to Time & billing through Firm

Central, you cannot close a matter if there are any outstanding expenses on the matter. To close a matter, access the matter page in Clients.

Select the **Options** drop-down arrow on the left and select **Close** or select the **Matter Actions** drop-down arrow on the far right and select **Close Matter.**

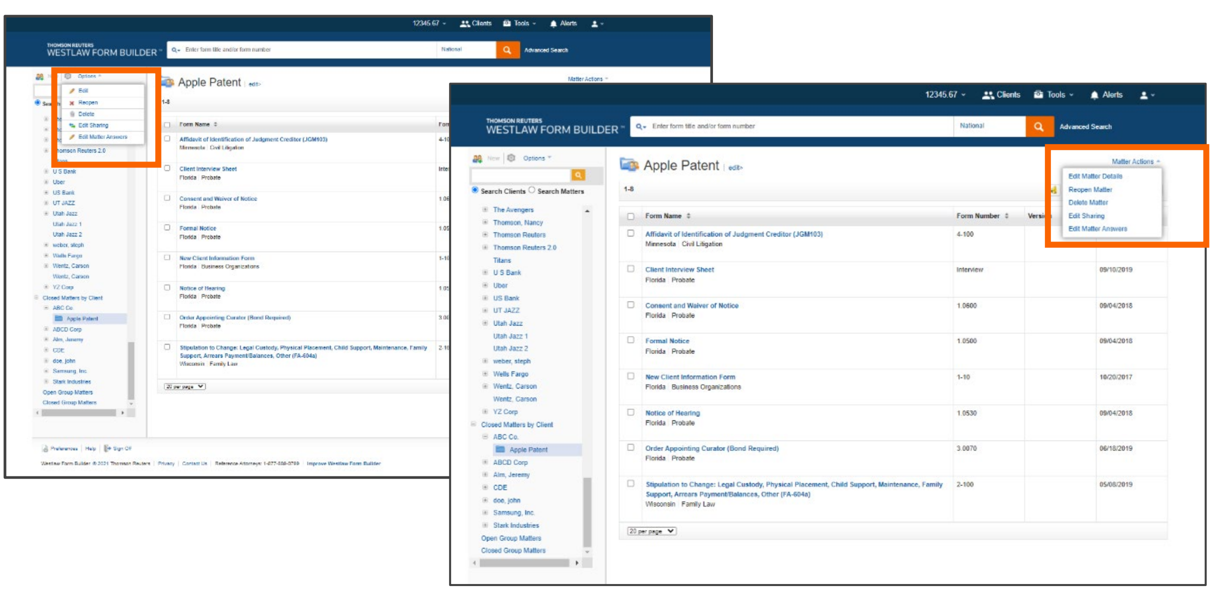


A Close Matter lightbox will appear. Select **OK**.



To reopen the matter, access the matter page in clients. It will now be under the **Closed Matters by Client** category, which can be accessed in the left pane.

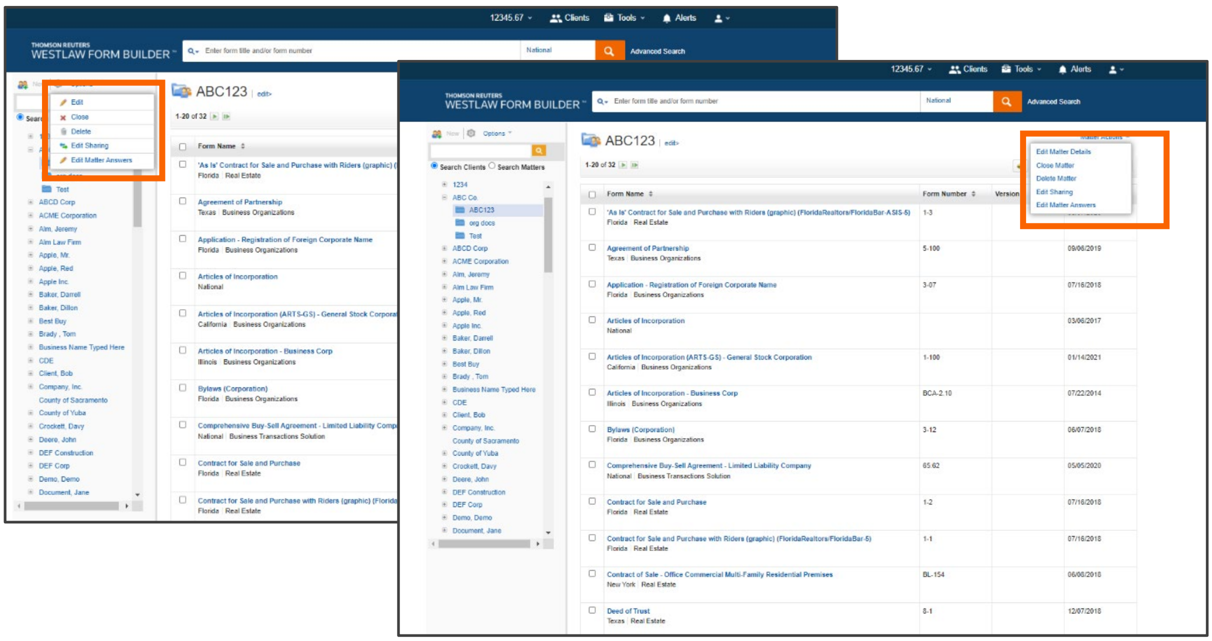
Select the **Options** drop-down arrow in the left pane and select **Reopen** or select the **Matter Actions** drop-down arrow on the far right and select **Reopen Matter**.



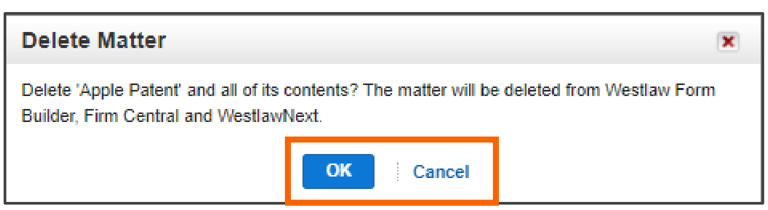
Deleting a Matter

Deleting a matter completely erases it from all Thomson Reuters programs. If you subscribe to Time & Billing through Firm Central, you cannot close a matter if there are any outstanding expenses on the matter.

Select the **Options** drop-down arrow in the left pane and select **Delete** or select the **Matter Actions** drop-down arrow on the far right and select **Delete Matter**.



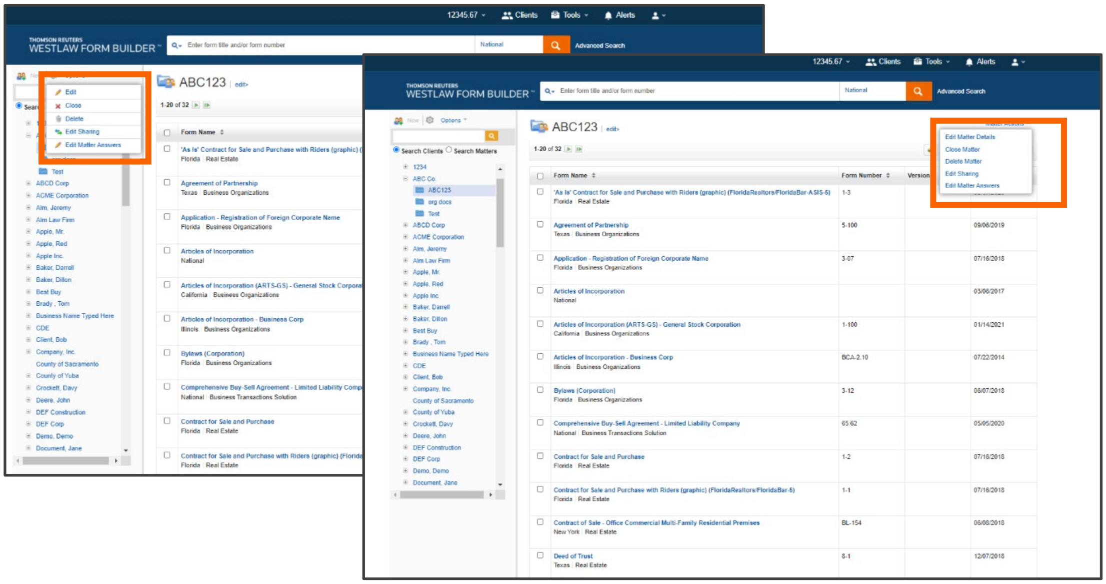
A Delete Matter lightbox will appear, informing you this matter will be deleted from all other Thomson Reuters programs, including Form Builder, Firm Central, and Westlaw. Select **OK** to delete the matter.



Modifying Sharing Permissions

When you create a new client or matter, it is automatically shared with everyone who is using Form Builder in your firm, company or organization, and they are considered Owners. Use the Edit Sharing feature to set sharing permissions and limit access to the matter. To customize the sharing permissions for a matter, access the matter page for the matter you would like to edit permissions for on Clients.

Select the **Option**s drop-down arrow in the left pane and select **Edit Sharing** or select the **Matter Actions** drop-down menu on the far right and select **Edit Sharing**.



An Edit Sharing light box appears.

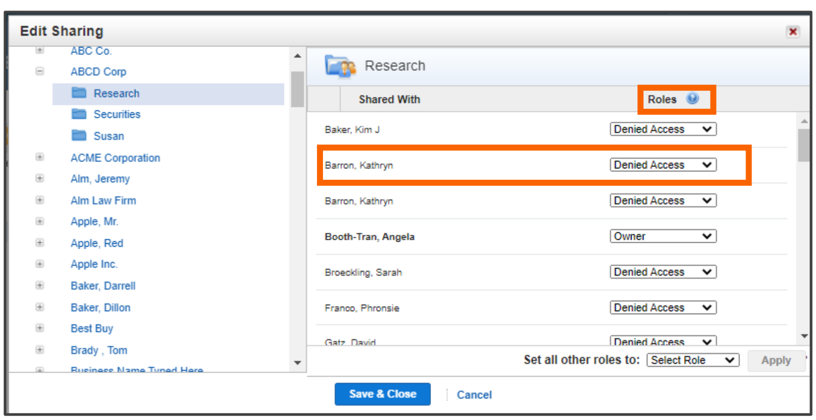
The left column is a list of all the clients and matters in your firm, company or organization. The right side shows a list of all members of the firm, company or organization with their current role for the matter for which you wish to edit permissions. Select above the R s list to see all capabilities for each role.

Find the **members** whose permissions you would like to change and use the **drop-down menu** next to their name to change their permissions.

Alternatively, use the Set all other roles to: **drop-down menu** just below the list. Choose the role and select Apply changes. This will change the role for everyone.

Select Save when you are finished modifying permissions for that matter. You can select other matters on the left to modify their permissions without leaving the Edit Sharing lightbox.

Select Save & Close to return to the matter page.



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