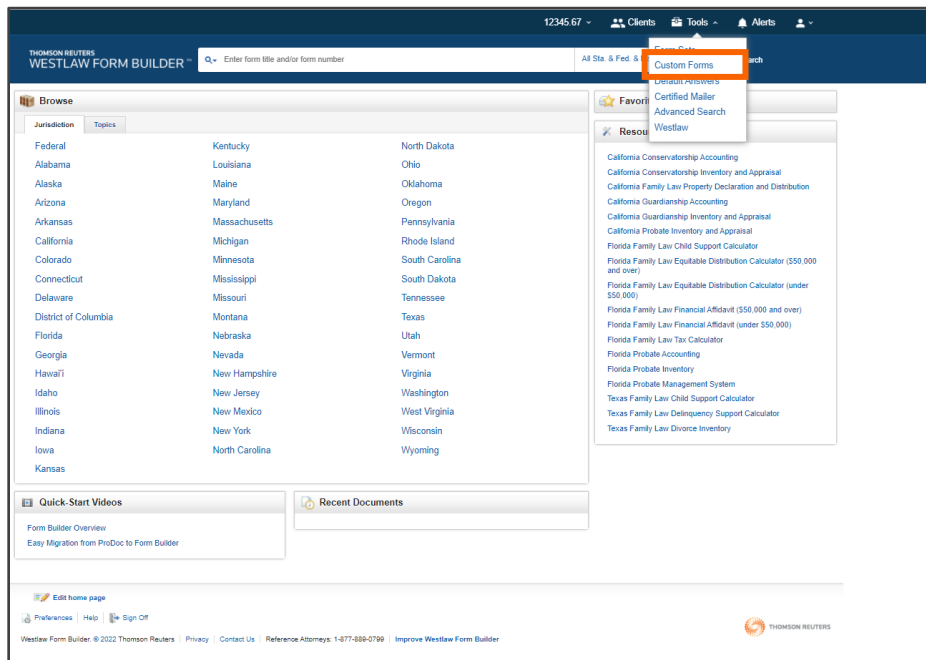# WESTLAW FORM BUILDER

How to view, manage, and build Custom Forms

Custom Forms are easy to manage and build in Westlaw Form Builder™.

VIEWING CUSTOM FORMS

Begin by selecting **Custom Forms** from the **Tools** drop-down menu.
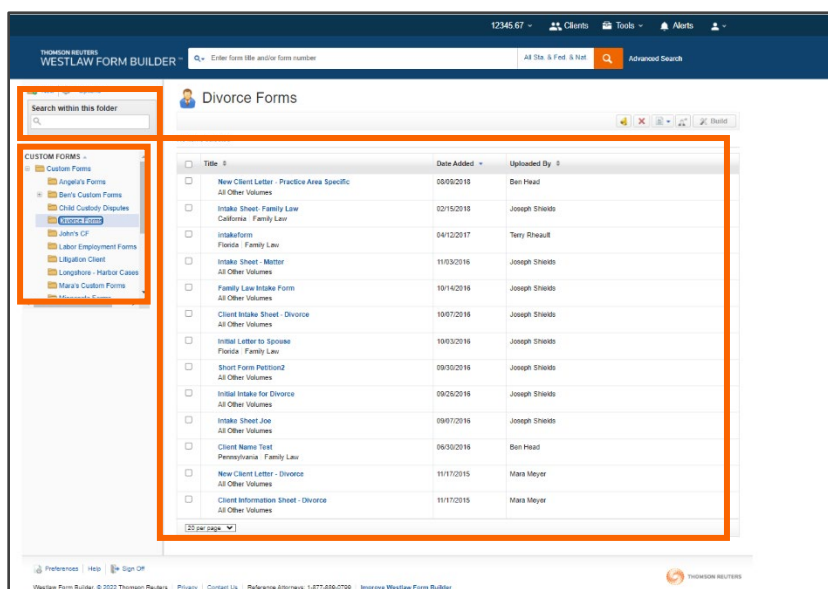

Once you have created and uploaded a custom form, you can view it on the right side of the Custom Forms page. All custom form folders that you have created display in the left column. Use this to navigate and search for your Custom Forms.

Select the **plus** or **minus icons** next to folders to expand or collapse their contents. The Custom Forms folder is the default folder and cannot be deleted.

To search for a specific form title, enter your terms in the **Search Form Title** field and select **Search.**

Select a **folder** to view the Custom Forms contained within it on the right. The titles of all custom forms in the folder are displayed, along with the date added and the person who uploaded the form. This page provides functions that are similar to the Results page when you browse or search for forms in Form Builder.
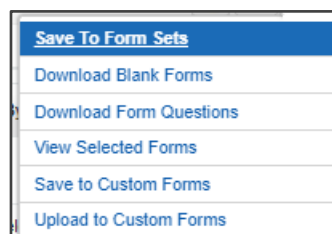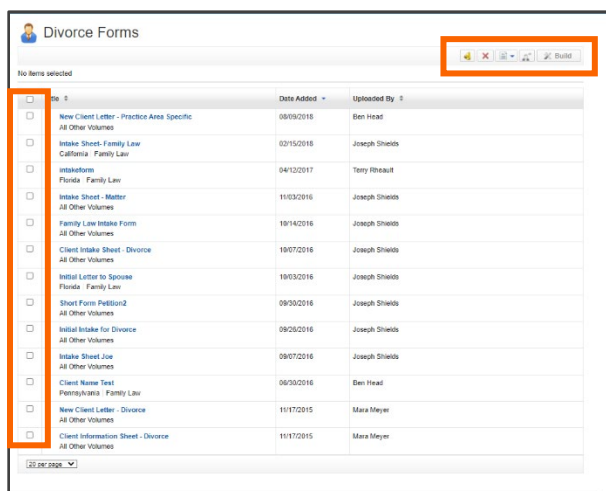
MANAGING CUSTOM FORMS

This page provides functions for Custom Forms that are similar to the Results page when you browse or search for forms in Form Builder.

In the top right area of the page you'll find your **function options**. For each, you must first select the form you would like by selecting the **check box** preceding the Title or select the **Select all** check box.

The options you have include:

1) The **red "X"** allows you to delete a form.

2) **Save to Form Set** allows you to add one or more custom forms to a public or private form set. A form set is a collection of forms to be built together.

3) **Download Blank Forms** allows you to download a copy of the custom form(s) with empty answer blanks.

4) **Download Form Questions** enables you to download a document containing all the questions for the custom forms you selected. This function consolidates all the information you need to collect in one place without having to go through all the forms. It only downloads the questions themselves, even if you have already completed the forms.

5) **View Selected Forms** allows you to see which forms you have selected, which is helpful if you have selected forms across multiple pages.

PREVIEWING CUSTOM FORMS

Select the hyperlink to the form Title that you're interested in viewing.

A copy of the form is visible, and all parts of the form that need to be added are shown by blank lines.

BUILDING A CUSTOM FORM

To begin building a Custom Form, select Build in the top, right area of the Preview page.

Looking for more information?

Visit **legal./solutions.com/formbuilder**

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