

WESTLAW FORM BUILDER

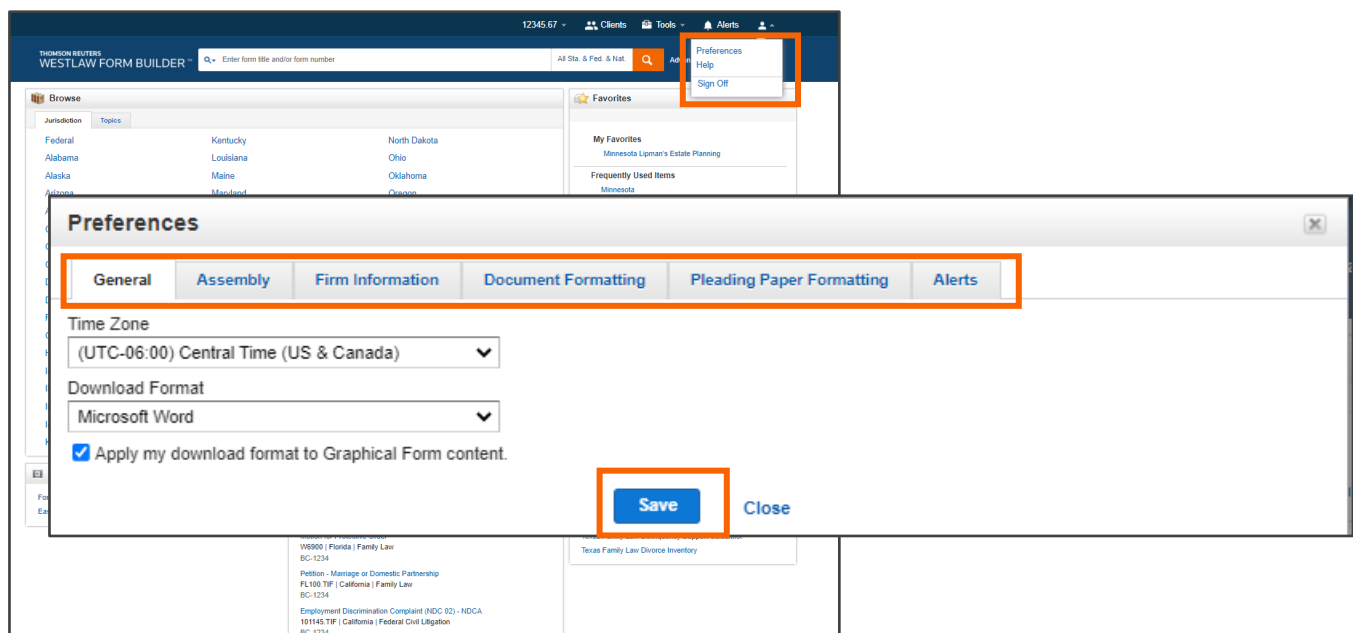
How to set your preferences

Westlaw Form Builder™ allows you to change some generic aspects of the application, such as the time zone and formatting of documents.

Accessing Preferences

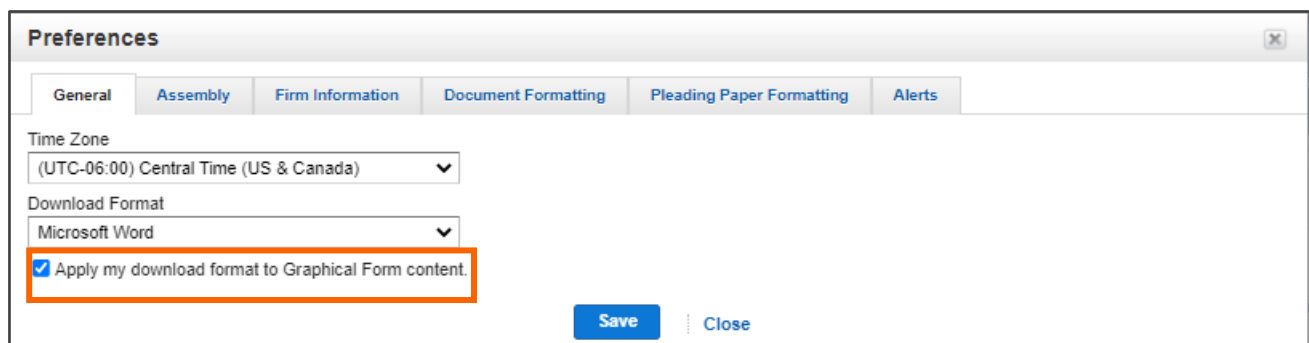
To access the Preferences menu, select  in the top, right corner and select **Preferences**.

Select the various **tabs** to make changes. When done, select **Save** at the bottom of the Preferences lightbox.



GENERAL TAB

The General tab enables you to change the Time Zone as well as the Download Format of your documents. Select the option you want to alter and select the appropriate choice in the respective drop-down menu. For the Download Format, you can choose either Microsoft Word™ or WordPerfect®. Selecting **Apply to my download format to Graphical Form** check box will change the graphical forms from downloading as PDFs to downloading as the format you selected the Download Format drop-down menu.



ASSEMBLY TAB

The Assembly tab enables you to alter the Placeholder for Skipped Questions. The default place is [* ____ *]. This placeholder for skipped questions will appear on all preview of the form as well as in the downloaded forms. To change it, type a new placeholder in the field. Ensure the placeholder is something you will notice so it is not ignored (potentially resulting in an incomplete form being submitted to the court or client).

NOTE: You should not use numbers as your placeholder.

The screenshot shows the 'Preferences' dialog box with the 'Assembly' tab selected. The 'Placeholder for Skipped Questions' section is highlighted with an orange box. It contains a text input field with the default placeholder text '[* ____ *]'. Below the input field are 'Save' and 'Close' buttons.

FIRM INFORMATION

Firm Information allows you to edit the name of the firm, company or organization as well as edit or add contact information. Replace or add information as necessary by typing in the fields. These fields will automatically populate your forms where necessary. Select the **Do not use firm information for default answers** check box to use different firm, company, or organization information to populate your forms.

The screenshot shows the 'Preferences' dialog box with the 'Firm Information' tab selected. The 'Do not use firm information for default answers' checkbox is highlighted with an orange box. The dialog box contains various input fields for firm information, including Address, City, State, Zip Code, Phone, Fax, Email, and Website. The 'Save' and 'Close' buttons are at the bottom.

DOCUMENT FORMATTING

The Document Formatting tab enables you to change the default font for graphical forms as well as the font, line spacing, and justification for text documents. Form Builder automatically matches the font of the form being built unless you change these settings.

To make changes, select the appropriate **check box** to activate their drop-down menus.

Preferences

General Assembly Firm Information **Document Formatting** Pleading Paper Formatting Alerts

Graphical Forms

Font

☐ Set Font

Font Type: Default

Font Size: Default

Word Processing Forms

Font

☐ Set Font

Font Type: Default

Font Size: Default

Line Spacing ?

☐ Set Line Spacing

Justification

☐ Set Justification

Default

Any changes to document formatting made during a build session will not be applied until you rebuild the form.

Save Close

PLEADING PAPER FORMATTING

The Pleading Paper Formatting tab enables you to alter the margins, line spacing, vertical borders, and number of lines on pleading papers. Each check box defaults to being selected so that the fields are activated. Make your desired modification by selecting them from the drop-down menus or the appropriate radio buttons.

Preferences

General Assembly Firm Information Document Formatting **Pleading Paper Formatting** Alerts

Margins

☒ Set margins

Left: 1

Right: 0.5

Top: 1

Bottom: 1

Vertical Borders

☒ Set borders

Left: Double

Right: Single

Line Spacing

☒ Set line spacing

☐ 1.5 spaced

☒ Double-spaced

Number of Lines

☒ Set number of lines

28 lines

Save Close

ALERTS

The Alerts tab enables you to set up email notifications for alerts as well as modify the setting for alerts concerning Modified Master Forms. Select the **Send an email notification when one or more of my alerts has been activated** check box to allow Form Builder to send an automated email when an alert has been triggered. You must enter an email address in the Recipients To: field if this box is selected. You can enter up to 100 email addresses. The Modified Master Forms alerts, unlike other alerts, are placed by default on all Modified Master Forms you have created. To disable the automatic alerts for Modified Master Forms, deselect the **Automatic Alerts** check box.

Preferences

General

Assembly

Firm Information

Document Formatting

Pleading Paper Formatting

Alerts

Email Settings for Alerts Notification

☒ Send an email notification when one or more of my alerts has been activated.

Recipients

To:

angela.booth-tran@thomsonreuters.com

*Maximum Characters allowed : 100

Modified Master Forms Automatic Alerts

By default, when an underlying Master Form you used to create a Modified Master Form (MMF) is substantially changed and updated, an alert icon automatically displays next to the MMF title in Westlaw Form Builder.

You may turn off automatic alerts for MMFs on which you want to be alerted if the underlying Master Form is updated by checking the form's check box and clicking the alert button on any toolbar where the alert button displays.

☒ Automatic Alerts: Set up automatic alerts when the MMF's underlying Master Forms are updated.

Note: By choosing to deselect the Automatic Alerts check box, you are turning off automatic alerting and any alert icons currently displaying next to all MMF's will be removed. You will not receive MMF alerts on updated Master Forms unless you manually set up alerts or keep the Automatic Alerts check box checked.

Save

Close

Looking for more information?

Visit legal.solutions.com/formbuilder