

# IPSOURCE®

## QUICK REFERENCE CARD



IPSource provides one-click access to the most valued intellectual property law information. It offers a wealth of content combined with powerful search tools so that you never have to wonder if there is somewhere else you should be looking.

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### CUSTOMER LEARNING & SUPPORT TEAM

For technical or reference support or to inquire about training, contact Carswell at:  
**Toll-Free:** 1.800.387.5164 / **In Toronto:** 416.609.3800

[www.westlawcanada.com](http://www.westlawcanada.com)



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## 01 HOW DO I SIGN ON/OFF IPSOURCE WITH ONEPASS?

All Westlaw Canada users must set up a OnePass account where you create your own Username and Password. To set up your OnePass account and sign on to IPSource:

1. Open a web browser, access [www.westlawcanada.com](http://www.westlawcanada.com) and click **Sign On to Westlaw Canada** located in the upper right corner.
2. Click [Switch to OnePass Sign On](#) located in the upper right corner of the sign on section. You may wish to bookmark this page.
3. Click [Register my Westlaw Password](#) and follow the instructions. (For more information, go to: [www.westlawcarswell.com/support/onepasshelp.htm](http://www.westlawcarswell.com/support/onepasshelp.htm)) Once you have registered your OnePass you may sign on to IPSource. Enter your **OnePass Username** and **Password** into the fields provided.
4. Enter a client identifier into the **Client ID** field. **This is a mandatory field** used for tracking your research and will name your Research Trail. You may enter up to 35 alphanumeric characters. Examples: a file number or research issue.
5. Click **Sign On**. Your default Home page is displayed.

To sign off Westlaw Canada, click the **SIGN OFF** button located in the upper right corner of the Navigation bar.

## 02 WHAT INFORMATION IS IN IPSOURCE?

For information on content coverage and currency, please click the [What's in IPSource](#) and [Currency Notes](#) links in the **About IPSource** section in the left frame of the Home page.

## 03 IPSOURCE HOME PAGE

The screenshot shows the Westlaw Canada IPSource home page. The navigation bar at the top includes links for FIND & PRINT, KEYCITECANADA, DIRECTORY, SITE MAP, 90087 2903, CONTACT US, HELP, and SIGN OFF. Below the navigation bar, the main content area is divided into several sections:

- Latest Developments:** This section features four featured items, each with a red callout number: 1. Dimock Stratton's Intellectual Property Law Newsletter; 2. Latest Supreme Court of Canada Cases; 3. Mann's Technology Newsletter; 4. McKeown's Brand Management Newsletter.
- Custom Search Templates:** This section lists various search templates with red callout numbers: 5. Cases; 6. Legislation and Related Materials; 7. Commentary & CED IP titles; 8. Canadian Abridgment Digests; 9. Annotations; 10. All IPSource Content.
- Intellectual Property Court Documents on a Litigator:** This section is available to non-subscribers and lists: 11. Pleadings; 12. Motion/Application Facts; 13. Motions; 14. Appeal Facts.
- Find/KeyCite a Document:** This section contains search fields for Name, Jurisdiction, Case, Title, Section, Jurisdiction, and Citation, with red callout numbers 15 and 16.

On the left side of the page, there is a sidebar with the following sections:

- IPSource in association with:** Includes logos for RIM, C, DATE, and NEWSLETTERS.
- Court Documents available:** Search Court Documents on Westlaw Canada.
- Browse Tables of Contents:** Includes links for Commentary, Forms and Precedents Collection, CED, Legislation, C.P.R. Classification, Canadian Abridgment Digests, and IPSource Directory.
- International IP Materials:** Includes links for Danwant World Patents Legal, TRADEMARKSCAN, Go to Definition Patent Research, and IPSource Directory.
- About IPSource:** Includes links for What's in IPSource, Currency Notes, and Getting Started Tips.
- Browse eReference Titles:** Includes links for What is this? and Login.

At the bottom of the page, there are logos for CARSWELL and THOMSON REUTERS, along with a footer containing the text "Help | Copyright | © Thomson Reuters Canada Limited".

1 Home page Source tabs / Navigation bar.

5 Find or KeyCite (note up) cases and legislation by name/title or any document by citation.

2 View the latest Newsletters or SCC documents.

6 Review content coverage and currency.

3 Search using Custom Search Templates.

7 Link to international services.

4 Link to court documents highlighted in the Dimock Stratton Intellectual Property Law Newsletter.

8 Browse various tables of contents.

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## 04 HOW CAN I KEEP CURRENT WITH INTELLECTUAL PROPERTY LAW-RELATED ISSUES?

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Click [Dimock Stratton's Intellectual Property Law Newsletter](#) to view the most recent newsletter in the right frame. This newsletter featuring the most significant, precedent-setting intellectual property law cases is published bi-monthly.

Click [Mann's Technology Newsletter](#) to view timely commentary by experts, including analysis of current developments and highlights of important new case law, legislation and policy. The newsletter is published bi-monthly and is edited by J. Fraser Mann and Elisabeth Symons.

Click [McKeown's Brand Management Newsletter](#) to view topics that discuss cases and issues of interest to Intellectual Property practitioners. Edited by John McKeown, this newsletter is published quarterly.

Once you've retrieved the most recent newsletter, the previous three newsletters appear on the **Result List** in the left frame. To search an archive of all newsletters, use the **Commentary & CED IP titles** Custom Search Template located in the right frame of the Home page.

Click the [Latest Supreme Court of Canada Cases](#) link to view a list of recently released SCC cases and press releases.

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## 05 HOW DO I FIND OR KEYCITE (NOTE UP) A CASE OR STATUTORY PROVISION BY NAME OR CITATION?

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1. Click the **Find** or **KeyCite** radio button located in the **Find/KeyCite a Document** section of the Home page.
2. **Case by name:** Enter the name of the case into the case **Name** field and select a jurisdiction from the drop-down list.


**Legislation by title:** Enter the statute, regulation or rule name into the **Title** field, section number into the **Section** field and select a jurisdiction from the drop-down list.

**By citation:** Enter the citation into the **Citation** field.

3. Click **Go**.

**KeyCite® Canada:** KeyCiting a document involves retrieving the appellate (full) history of a case, plus all citing references of a case, statute, regulation or rule, including judicial treatments and secondary sources. Documents receive one treatment flag/icon only and their definitions are as follows:

 A **red flag** warns that the case may not be good law; that the decision has been reversed, or has not been followed within the same jurisdiction or by the Supreme Court of Canada.

 A **yellow flag** warns that the decision has some negative history or treatment, but has not been reversed or overruled. It is also displayed if a treatment has been recently added, and has not yet been editorially analyzed.

**H** A **blue H** indicates that the decision has some direct history but it is not known to be negative.

**C** A **green C** indicates that the decision has no direct history, but there are treating cases or other citing references to the decision. *For statutes, regulations and rules* the green C indicates that there are cases or other citing references to the provision.

KeyCite Canada is accessible from:

- Links on the **Related Info** tab when viewing your results (Full History, Direct History (Graphical View) and Citing References).
- The Home page.
- The Westlaw Canada Navigation bar.

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## 06 HOW DO I SEARCH THE VARIOUS CONTENT TYPES IN IPSOURCE?

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1. Click a link in the **Custom Search Templates** section located in the right frame of the Home page.
2. Enter search terms into the **Search full text for** box. Add Boolean connectors or use *The result must contain* drop-down list.
3. Fill in any fields (e.g. judge, court, etc.) and/or limit your results by using the selection boxes (e.g. jurisdiction, etc.), if you want.
4. Click **Go**.

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## 07 HOW DO I SEARCH CPR DECISIONS ONLY?

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1. Click the **Cases** link in the **Custom Search Templates** section of the Home page.
2. Click the **Canada Law Book cases (only)** radio button.
3. Enter search terms into the **Search full text for** box. Add Boolean connectors or use *The result must contain* drop-down list.
4. Fill in any fields and/or limit your search using the selection boxes provided, if you want.
5. Click **Go**.

**TIPS:** To search all reported and unreported decisions, including the CPRs, click the **IPSource** radio button. This is your most complete intellectual property case law search. To search all Canadian cases, excluding the CPRs, click the **LawSource** radio button.

To see the CPR Classification Scheme, click the **C.P.R. Classification** link located in the **Browse Tables of Contents** section in the left frame of the Home page.

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## 08 HOW DO I FIND ANNOTATIONS ON A SPECIFIC STATUTORY PROVISION?

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1. Click the **Annotations** link in the **Custom Search Templates** section of the Home page.
2. Select a statute from the *Legislation* drop-down list.
3. Enter the whole section number into the **Section** field.
4. Limit your search to a specific publication, if you want.
5. Click **Go**.

You may also link to annotations directly from a statutory provision. Simply click the **Annotations** link located on the **Related Info** tab.

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## 09 HOW DO I SEARCH ANNOTATIONS?

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Included in your subscription are the *BLG Consolidated Intellectual Property Statutes and Regulations* and *Consolidated E-Commerce Statutes and Regulations, Canadian Trade-marks Act – Annotated Robic Leger (Richard), Canadian Copyright Act – Annotated Robic (Carrière), and The Annotated Patent Act (Stratton)*.

1. Click the **Legislation and Related Materials** link in the **Custom Search Templates** section of the Home page.
2. De-select **Statutes and Regulations** and select **Related Materials**.
3. Enter search terms into the **Search full text for** box. Add Boolean connectors or use *The result must contain* drop-down list.
4. Fill in any fields and/or limit your search using the selection boxes provided, if you want.
5. Click **Go**.

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## 10 WHAT EXPERT COMMENTARY IS AVAILABLE IN IPSOURCE?

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IPSource contains an extensive collection of Carswell intellectual property, information technology and electronic commerce law commentary authored by leading practitioners.

To browse commentary, click the **Commentary** link located in the **Table of Contents** section in the left frame of the Home page. Select a publication by clicking the

appropriate blue hypertext link. Click the + button to expand a heading and then click a blue document link to retrieve the full text.

To search commentary, click the [Commentary & CED IP titles](#) link in the **Custom Search Templates** section of the Home page. To select more than one publication in the **By Publication** selection box, click the first publication and then **Ctrl+click** all other publications.


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## 11 HOW DO I PRINT, EMAIL, DOWNLOAD, FAX OR SAVE IN IPSOURCE?

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Click the appropriate button located in the upper right corner of the right frame.



Click  to print the current document only, using your default format preferences.

If you want to deliver your current document along with other related information at the same time or you want to change your default formatting settings, click one of the other applicable icons.

**Note:** Use **Find & Print** to retrieve up to 20 citations simultaneously for printing, emailing or downloading.

1. Click **Find & Print** on the Navigation bar located at the top of the screen.
2. Enter your citations into the box provided and select your results and delivery options.
3. Click **Send Request**.

**TIP:** To print part of a document, highlight the desired text. Then, using your browser, open the **File** menu and select **Print**. In the **Print** window, choose the **Selection** radio button and then click **Print**.

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## 12 WHERE CAN I FIND HELP?

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- Review online tutorials to quickly learn about specific functionality or content. Go to: [www.westlawcarswell.com/support/emodules.htm](http://www.westlawcarswell.com/support/emodules.htm)
- Use online help or download reference materials from the **Help Centre** located in the **SITE MAP** on the Navigation Bar or go to: [www.westlawcarswell.com/support/reference.htm](http://www.westlawcarswell.com/support/reference.htm)
- Contact our Reference Support or Technical Support Teams, 24 hours a day, 7 days a week, by phone: 1.800.387.5164 or 416.609.3800 or email: [carswell.reference@thomsonreuters.com](mailto:carswell.reference@thomsonreuters.com) or [carswell.techsupport@thomsonreuters.com](mailto:carswell.techsupport@thomsonreuters.com)
- Contact our Customer Learning Team to book a complimentary training session. Phone: 1.800.387.5164 or 416.609.3800 or email: [carswell.learning@thomsonreuters.com](mailto:carswell.learning@thomsonreuters.com)

