

InsolvencySource®

QUICK REFERENCE CARD



InsolvencySource® provides one-click access to the most valued insolvency 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



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01 HOW DO I SIGN ON/OFF INSOLVENCYSOURCE 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 InsolvencySource:

1. Open a web browser, access 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.westlawecarswell.com/support/onepasshelp.htm). Once you have registered your OnePass you may sign on to InsolvencySource. 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 INSOLVENCYSOURCE?

For information on content coverage and currency, please click the **What's in InsolvencySource** and **Currency Notes** links in the **About InsolvencySource** section in the left frame of the Home page.

03 INSOLVENCYSOURCE HOME PAGE

The screenshot shows the Westlaw Canada InsolvencySource home page. The navigation bar at the top includes 'FIND & PRINT', 'KEYCITECANADA', 'DIRECTORY', 'SITE MAP', 'COURT DOCS', 'CONTACT US', 'HELP', and 'SIGN OFF'. The main navigation tabs are 'LawSource', 'CriminalSource', 'FamilySource', 'InsolvencySource', 'SecuritiesSource', and 'Litigator'. The 'InsolvencySource' tab is active. The page is divided into several sections:

- Wireless Westlaw**: Access Wireless Westlaw. From any wireless device. (Callout 6)
- Browse Tables of Contents**: Includes links for 'Houlden & Morawetz - Analysis', 'Houlden & Morawetz - Precedents', 'McLaren - Secured Transactions', 'Boucher et Fortin - Faillite et insolvabilité', 'O.S.B. Bulletins', 'Insolvency Court Documents', and 'Policy Documents'. (Callout 5)
- Due Diligence Services**: Includes 'Security Searches'.
- About InsolvencySource**: Includes 'What's in InsolvencySource' and 'Currency Notes'.
- Getting Started Tips**: Includes 'What is this?' and 'Login'.
- Browse eReference Titles**: Includes 'What is this?' and 'Login'.
- Latest Developments**: Includes 'Houlden & Morawetz Newsletter', 'Insolvency Institute of Canada Latest Court Filings', and 'Office of the Superintendent of Bankruptcy Bulletins'.
- Custom Search Templates**: Includes 'Cases', 'Canadian Abridgment Digests', 'Legislation', 'Commentary', 'Policy Documents', 'Insolvency Court Documents & ITC Articles', and 'All InsolvencySource Content'.
- Find/KeyCite a Document**: Includes search fields for Name, Jurisdiction, Title, Section, and Citation, with 'Go' buttons. (Callout 4)

At the bottom, there are logos for 'CARSWELL.' and 'THOMSON REUTERS'.

1 Home page Source tabs/Navigation bar.	4 Find or KeyCite (note up) cases and legislation by name/title or any document by citation.
2 View the latest Newsletter, OSC bulletins, SCC cases or Restructuring Court Filings (supplied by the Insolvency Institute of Canada).	5 Review content coverage and currency.
3 Search using Custom Search Templates.	6 Browse various tables of contents.

04 HOW DO I KEEP CURRENT WITH INSOLVENCY LAW-RELATED ISSUES?

From the Latest Developments section in the right frame of the Home page:

- Click the **Houlden & Morawetz Newsletter** link to view the most recent newsletter. You may access the previous eight newsletters, from the left frame. To search an archive of this newsletter, use the **Commentary** 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.

05 WHAT BANKRUPTCY OR RESTRUCTURING COURT DOCUMENTS ARE AVAILABLE IN INSOLVENCYSOURCE?

Insolvency Institute of Canada court filings are documents filed in court for major bankruptcy and restructuring cases across Canada. They include: Including Initial Orders, Monitor's Reports, Affidavits, Facta, Motion Records, Notices and Endorsements.

To browse these documents:

1. Click the **IIC Court Filings** link in the **Browse Tables of Contents** section of the Home page.
2. Click the + button beside the heading you want to expand. Continue clicking the + button until you reach the document level represented by a blue hypertext link.
3. Click the link to retrieve the document.





To search these documents:

1. Click the **IIC Material** link in the **Custom Search Templates** section of the Home page.
2. Select **IIC Court Filings**.
3. Enter your search terms into the **Search full text for** box and select an option from The results must contain drop-down list.
4. Click **Go**.

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

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

07 HOW DO I SEARCH THE VARIOUS CONTENT TYPES IN INSOLVENCYSOURCE?

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 available (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**.

08 HOW DO I FIND SIMILAR P.P.S.A. RULES IN OTHER JURISDICTIONS?

1. Click the **P.P.S.A. Concordance** link in the **Browse Tables of Contents** section located in the left frame of the Home page.
2. Click a **+** button beside a heading to expand it to the next level of detail.
3. Click the document hypertext link to retrieve links to other similar rules.
4. For easier viewing, click the **Maximize** button in the Link Viewer.

09 WHAT EXPERT COMMENTARY AND POLICY DOCUMENTS ARE AVAILABLE IN INSOLVENCYSOURCE?


To search commentary or policy documents, click the **Commentary** or **Policy Documents** link in the **Custom Search Templates** section of the Home page. Use **Ctrl+click** in the **By Publication** selection box to search multiple publications at one time.

To browse various texts, click the appropriate **Table of Contents** link located in the left frame of the Home page. Click the **+** button until you reach a document level. Click the blue hypertext link to retrieve the document.

10 HOW DO I PRINT, EMAIL, DOWNLOAD, FAX OR SAVE IN INSOLVENCYSOURCE?

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**.

11 WHERE CAN I FIND HELP?

- Review online tutorials to quickly learn about specific functionality or content. Go to: www.westlawecarswell.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.westlawecarswell.com/support/reference.htm
- Click the  icons for context-sensitive tips and examples.
- 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 or 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

