

WestlawCarswell Quick Reference Card

Strategies for Minimizing Client Research Fees for Cost Recovery Purposes

Use FIND whenever possible

If you know the name or citation of the case or legislation you want, use **Find**. Finding has a lower transactional value than searching.

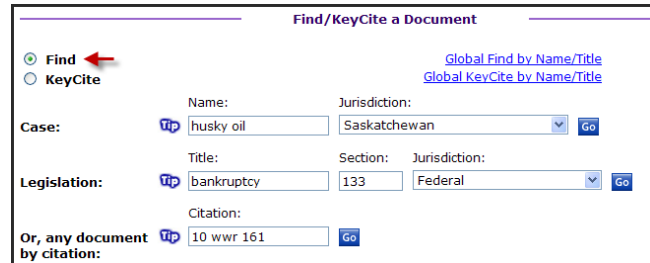


Figure 1

Maximize your SEARCH results

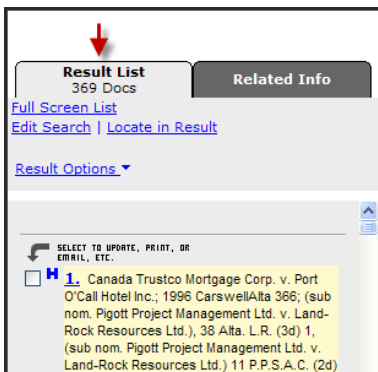


Figure 2

All documents retrieved by a search **are included** in the transactional value of the search. You may browse, print or email these documents without incurring any additional values. Try to capture as many documents as possible that are relevant to your issue by using general terms and minimizing the use of field restrictions. Up to 10,000 documents will be displayed.

Avoid “Edit Search” – Use “Locate in Result”

Editing a search is deemed a new search and therefore incurs another transactional value. Use **Locate in Result** to refine your search. Locate in Result is included in the value of the search. It is best to run a fairly broad initial search (see tip above) and then use Locate in Result to target documents. Use Locate in Result as many times as you wish to refine your search until you find documents on point without incurring any additional transactional values.

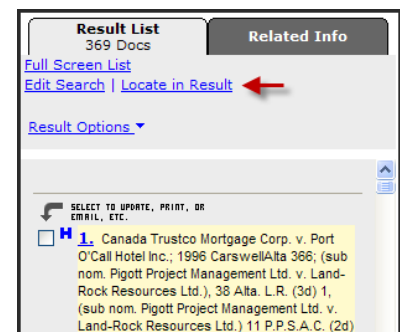


Figure 3

Limit KeyCite Display

Use KeyCite Limits to refine your Citing References (Limit KeyCite Display). No transactional values are accrued when using or modifying limits. Maximize your efficiency by using Locate to identify key search terms in the KeyCite results.

KeyCite Limits
for: 1996 CarswellAlta 366

Locate
The Locate feature allows you to refine your KeyCite result by searching the text of cases, administrative decisions, and analytical materials in the citing references list of the KeyCite display.

Terms and Connectors

Locate: "workers compensation"

Look for terms in the same paragraph as the cited reference
(When choosing this selection, neither an ampersand (&) nor a but not connector (%) may be used.)

Note: KeyCite Locate works for KeyCite results of less than 2000 documents.

Add Connectors or Expanders [Help](#)

&	AND	/s	In same sentence
space	OR	+s	Preceding within sentence
-	Phrase	/p	In same paragraph
%	But not	+p	Preceding within paragraph
	Root expander	/n	Within n terms of
*	Universal character	+n	Preceding within n terms of

Figure 4

Access the Research Trail to re-visit your search

Use your Research Trail **before 2:00am** Central Time to re-run a search or retrieve a document (indicated with a black dot) without incurring any additional transactional values for the remainder of the day.

Research Trail			
Access Research Events with a • at no additional charge until 2:00 a.m.			
Current Research Trail: 28/01/2009 08:59AM for Client MJB		Download Trail E-Mail Trail	
Research Event	Database or Citation	Date	Notes
• KeyCite Citing Refs - Canada Trustco Mortgage Corp. v Port O'Call Hotel Inc.	1996 WL 1775481	28/01/2009 09:08 AM	Add Note
• Viewed Document - Husky Oil Operations Ltd. v Minister of National Revenue	1995 CarswellSask 740	28/01/2009 09:04 AM	Add Note
• Viewed Document - Canada Trustco Mortgage Corp. v Port O'Call Hotel Inc.	1996 CarswellAlta 366	28/01/2009 09:03 AM	Add Note
• Search - holdback & insolvency (369 Docs)	CAN-ALLCASES	28/01/2009 09:03 AM	Add Note
• KeyCite History - Husky Oil Operations Ltd. v Minister of National Revenue	1995 WL 1732430	28/01/2009 09:01 AM	Add Note
Open Trail - MJB	Client ID	28/01/2009 08:59 AM	Add Note

*Printing from Trail is charged according to your subscription

Figure 5

Request training

For more strategies book a training session with a Learning Consultant. Contact the Carswell Customer Learning Team at 416.609.3800 or 1.800.387.5164 or email: carswell.learning@thomsonreuters.com.