Westlaw® Canada
Quick Reference Card
Using the Westlaw Canada Reporting System v.2

The Westlaw Canada Reporting System v.2 is a cost recovery and reporting service, which allows designated personnel to track Westlaw Canada usage and charges for a particular account or customized group of accounts, clients, users, or usage dates, all with the flexibility of Internet access.

Use the reporting system to take advantage of all these features:

- **Flexible reporting options** – generating reports is flexible and easy. Choose from numerous standard report formats or create your own custom report format.
- **Customized client pricing** – apply a discount or a monthly fixed amount, which is used with standard or custom report formats.
- **Customized account groups** – create customized account groups by combining all or some location accounts.
- **Automatic reports** – eliminate the need to remember to run usage reports. Your "auto reports" automatically arrive in a specified e-mail inbox.
- **TimeKeeper ID** – identify each Westlaw Canada user with a unique identifier to meet your organization's specific reporting needs.

Notes: The Reporting System produces reports that are compatible with PCLaw, ProLaw and Elite. Charges are estimates and may or may not reflect discounts and other charges, such as taxes.

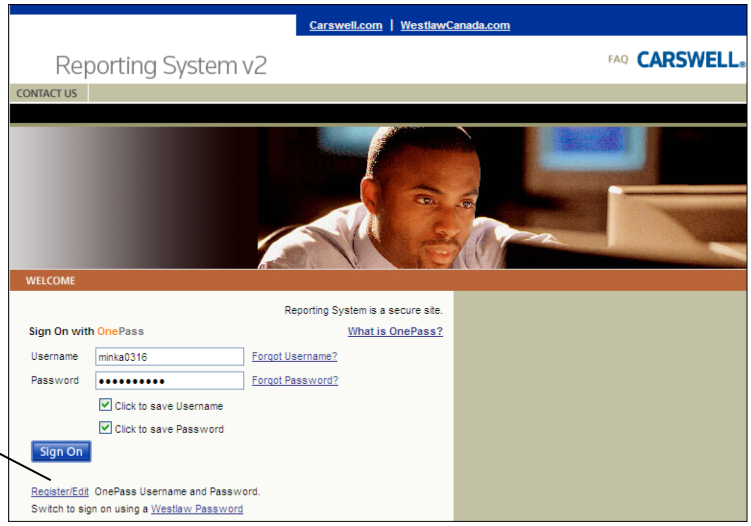
Setting up a OnePass Account and Signing On

All Reporting System v.2 users must set up a OnePass Account where you create your own username and password.

1. To set up a OnePass account, go to: www.reportingsystem.westlawcanada.com. (You can also access the Reporting System from the **Site Map** within Westlaw Canada.)

2. Click Register/Edit OnePass Username and Password located below the Sign On button and then follow the instructions that appear.

Alternatively, follow the instructions that were sent to you in the Welcome email.



Register/Edit link

Figure 1

Important note: If you subscribe to other Carswell products (i.e. Westlaw Canada, Taxnet Pro v.2, or Session Tracker – Rapport de Session) and have already registered a OnePass Account, enter your Username and Password into the *Update an Existing OnePass Account* section and click the **Update Account** button to update the account and add your Reporting System password/registration key to that account. However, if you currently do not have a OnePass Account, you **must** create one in order to log in to the Reporting System.

To log in to the Reporting System v.2:

1. Using a web browser go to: www.reportingsystem.westlawcanada.com.

2. Enter your OnePass **username** and **password** into the fields provided and then click **Sign On**.

3. Select **Click to save Username** and/or **Click to save Password** to save your OnePass sign on credentials onto your computer. (This is optional but highly recommended.)

To log out of the Reporting System v.2, click **Logout** located in the upper right corner of the Navigation bar.

Overview

After signing on, use the toolbar at the top of any page to access reporting system features.

Access the Carswell website.

Access Westlaw Canada.

Access online help.

Access FAQs.

View user guide and tutorials.

Figure 2 – Toolbar

Read about what's new in the Reporting System.

Let us know what you think about the Reporting System.

View transactional pricing information.

Choose an option, then click **GO** if necessary.

End your Reporting System session.

Creating Reports to Track Westlaw Canada Usage

You can create reports to track Westlaw Canada usage by account or customized group of accounts, users, client, or usage date. Select **Create Report** from the drop-down list and then click **GO**, if necessary, to display the Create Report page. **Note**: This is the default page for the Reporting System.

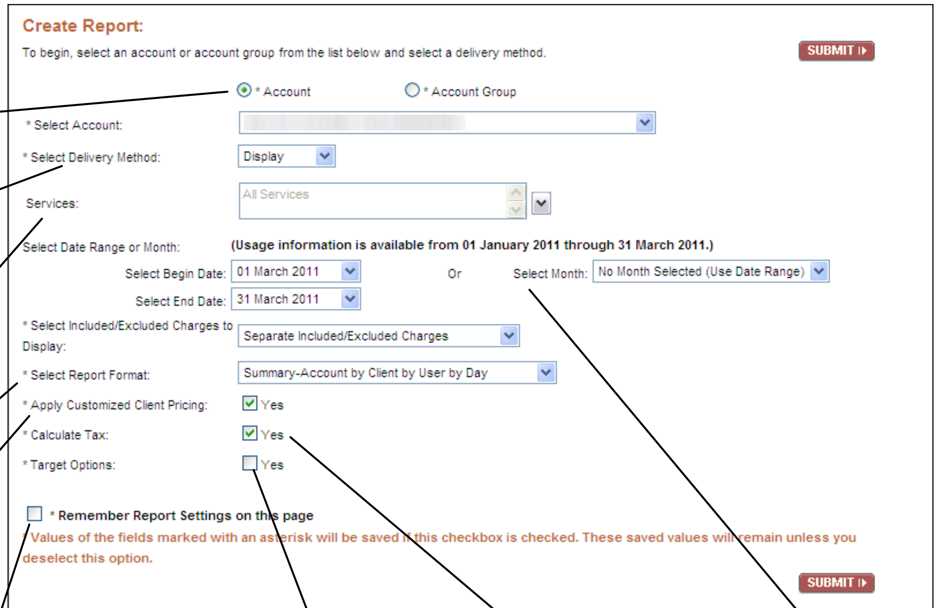


Figure 3 – Create Report Page

Select the account or account group you want to use in the report.

Select the delivery method: display, download, e-mail or auto report.

Select the service(s) you'd like to include in your report.

Select the type of report you want to run.

Select to apply customized client pricing to your client/user charges.

Select to save your report settings.

Select to narrow your report results to specific clients, matters, or users.

Select to calculate tax for your charges.

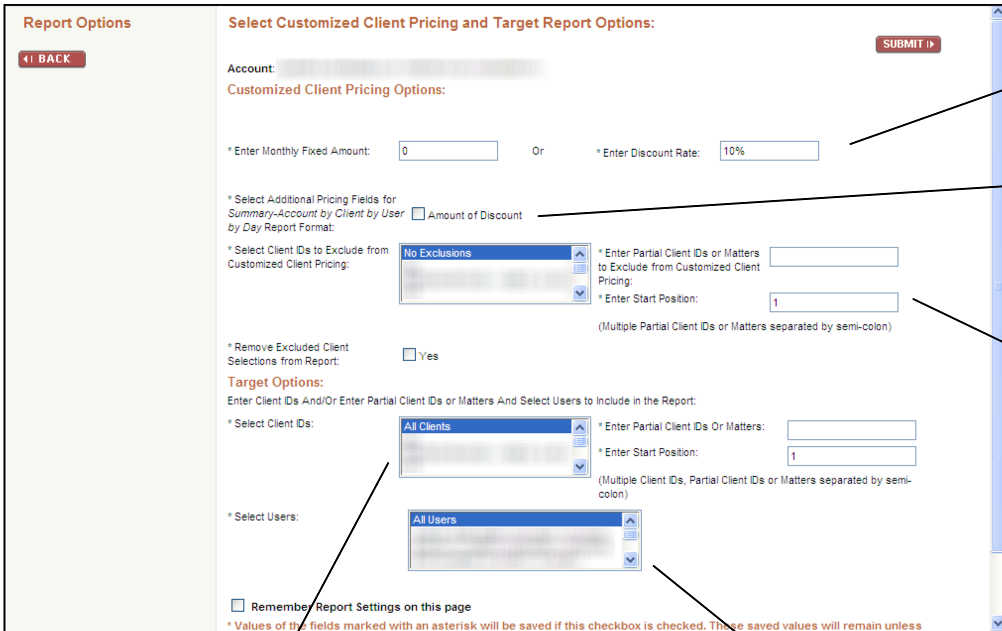
Select the report date range.

What is Customized Client Pricing?

If you provide a discount to your clients for online charges, the customized client pricing feature allows you to apply the discount to the total charges in your report. Or, you can specify a monthly fixed rate billing amount to allocate to client or user charges. If you have clients who should be excluded from customized client pricing calculations, you can specify them. See "Customized Client Pricing and Target Options" below.

Customized Client Pricing and Target Options

On the Create Report page, you can select **Apply Customized Client Pricing**, **Target Options**, or both. When you click **Submit**, the Select Customized Client Pricing and Target Report Options page is displayed. Select your options and click **Submit** again to continue.



Customized Client Pricing
Enter a monthly fixed amount or a discount rate.

Select to show the dollar amount differences that result from the application of customized client pricing.

Select specific client IDs to exclude from customized client pricing. Also, you can enter partial client IDs or matter IDs to exclude these clients or matters.

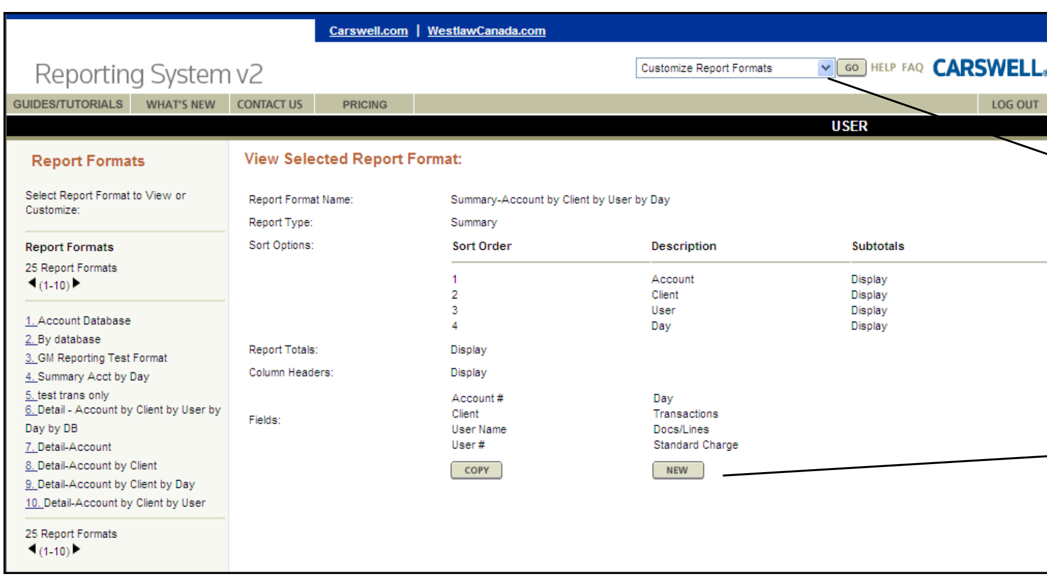
Figure 4 – Select Customized Client Pricing and Target Report Options page

Target Options
Select the client IDs to include in the report. Also, you can enter partial client IDs or matter IDs to include these client or matters. For example, you can enter 999 to include all client IDs that begin with 999. Enter 1 at the Start Position to include the client IDs or matter IDs, starting with the first digit in the IDs.

Select the users to include in the report and to display their portion of the charges

Creating Custom Reports to Meet Your Specific Reporting Needs

In addition to the standard report formats, you can create customized reports to meet the tracking needs of your organization.



Select **Customized Report Formats** and then click **GO**, if necessary, to display the View Selected Report Format page.

Click **New** to create a new report format.

Figure 5 – View Selected Report Format page

Type a name for the new report format.

Select the type of report.

Select the fields to determine how the report data is stored. Select the **Yes** checkbox next to a field if you want the report to display subtotal amounts.

Select to calculate total amounts.

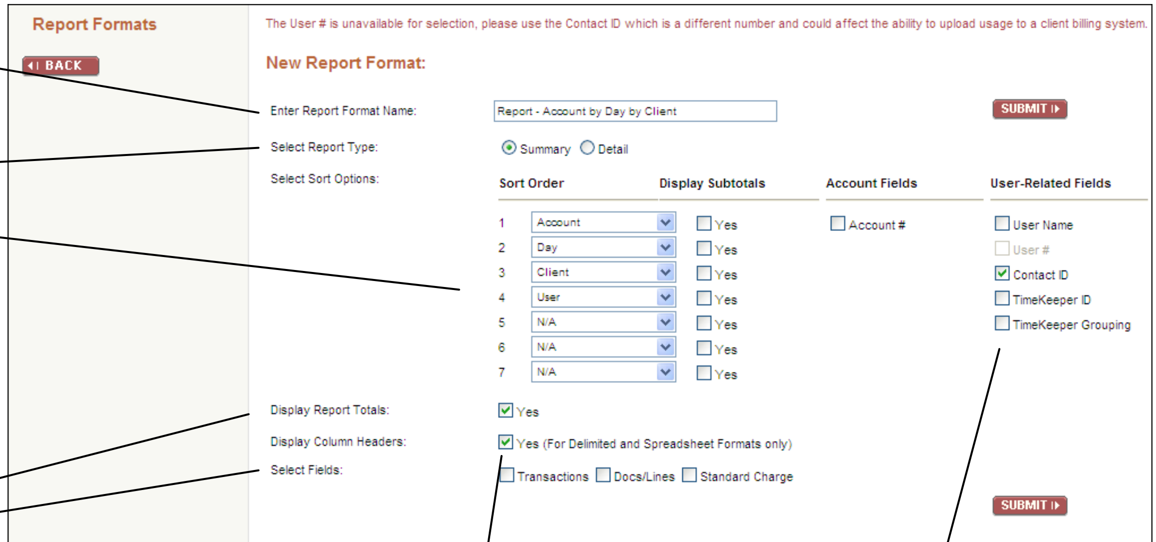


Figure 6 – New Report Format page

Select the fields you want to include in the report.

Select to include column headers in downloaded reports that use the delimited or spreadsheet formats.

Select user information to be displayed in your report.

Scheduling Reports to be Delivered Automatically

Use the Manage Auto Reports feature to schedule a report to automatically run daily, weekly, biweekly, or monthly. You can create a new auto report or copy settings from an existing auto report to create another report.

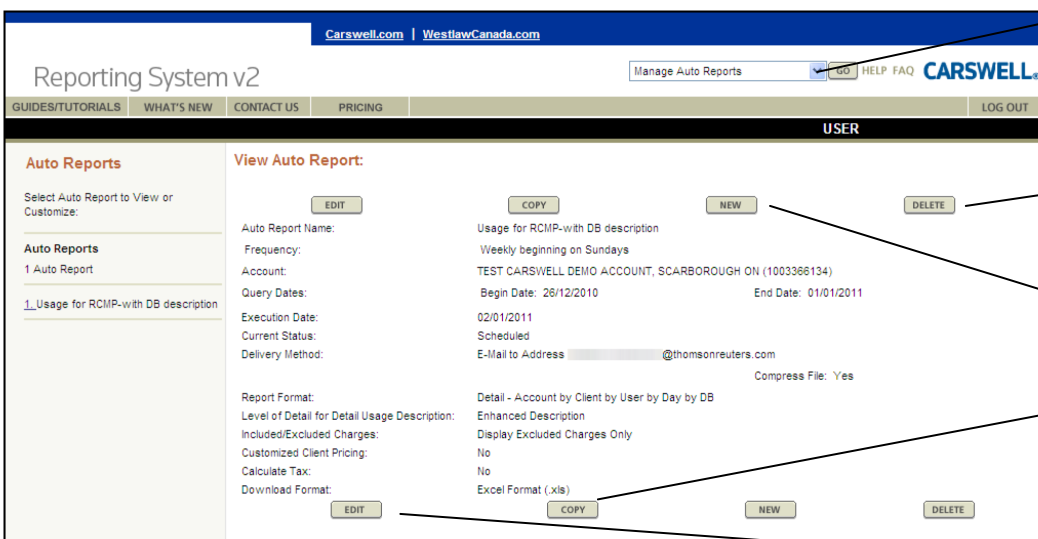


Figure 7 – View Auto Report page

Select **Manage Auto Reports** and then click **GO**, if necessary, to display the View Auto Report page.

Click **Delete** to remove the displayed auto report.

Click **New** to create an auto report.

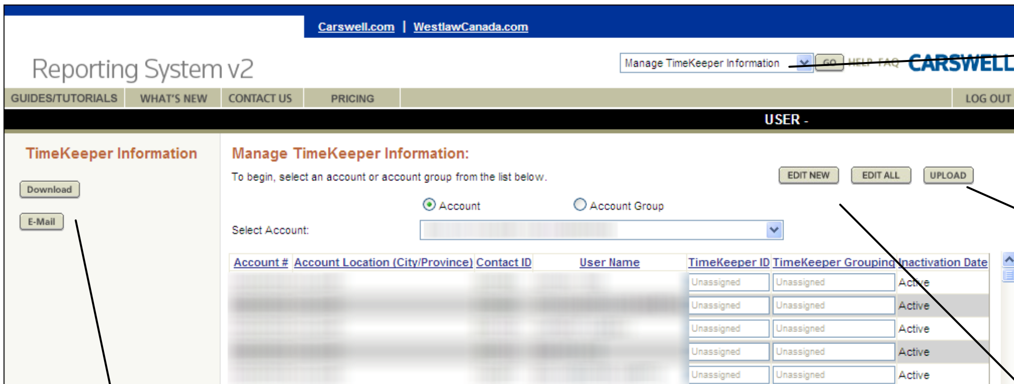
Click **Copy** to create a report based on settings from the displayed report.

Click **Edit** to modify the displayed auto report.

Note: Deactivation of your password will result in cancellation of all scheduled reports.

Using TimeKeeper IDs to Track Usage and Charges for Groups of Users *(Corporate Administrators only)*

The TimeKeeper ID feature lets you assign an identifier to Westlaw Canada users. (The TimeKeeper ID defaults to the numeric portion of a user's Westlaw Canada password until your organization changes it.) For example, if you want to track usage and charges by practice area, use TimeKeeper IDs and TimeKeeper groups to assign each user to a practice area.



Select **Manager TimeKeeper Information** and then click **GO**, if necessary, to display the Manage TimeKeeper Information page.

Click **Upload** to copy TimeKeeper IDs from your computer.

Click **Edit New or Edit All** to modify TimeKeeper IDs or groups.

Figure 8 – Manage TimeKeeper Information page

Select the delivery method for viewing TimeKeeper Information – **Download** or **E-mail**.