Westlaw Australia

Forms and Precedents

The Forms and Precedents collection comprises more than 3,000 expertly drafted precedents, statutory forms and checklists, and practical commentary.

This guide outlines various methods to locate a form or precedent in Westlaw Australia and describes how a document can be downloaded and completed in Microsoft Word.

Forms & Precedents on Westlaw Australia contains precedents from three separate publishers:

- a) ACP which is an abbreviation for Australian Commercial Precedents.
- b) NSW Precedents; and
- c) Victorian Precedents.

These publishers have different precedent collections and you can browse the precedents the following ways:

How to Browse a Precedent Collection

How to locate a document using the Precedents Index

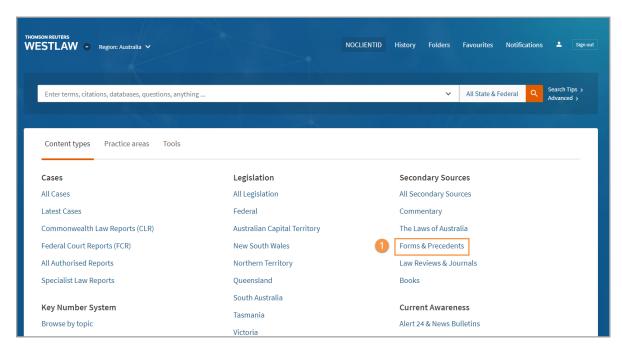
How to search for Forms and Precedents using Plain Language

How to search for Forms and Precedents using Terms and Connectors

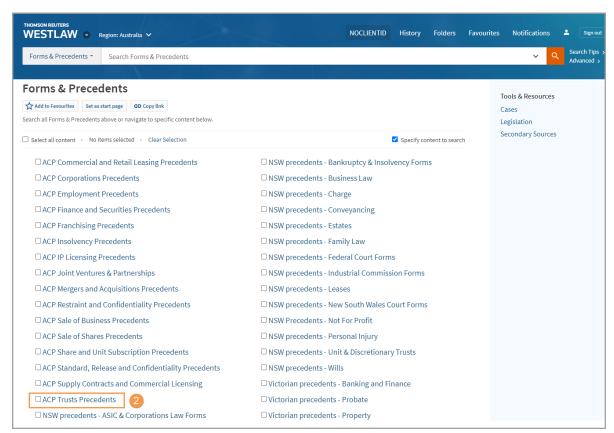
Document Features

How to Browse a Precedent Collection

1. From the Westlaw Australia homepage click **Forms and Precedents** from the **Secondary Sources** list.

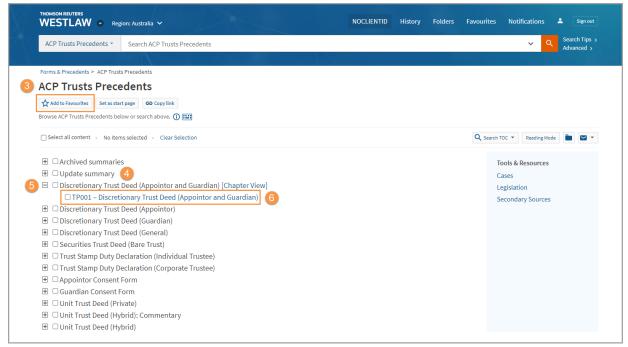


2. The Forms & Precedents are displayed by publisher and collection. Click the required Precedents from the list e.g., ACP Trust Precedents.



- 3. Click "Add to Favourites" to create a shortcut to a set of Precedents used regularly.
- 4. Click "Update Summary" for information on the latest updates.

 Note: Precedents will be updated to maintain currency in line with legislative changes, case law developments and any other relevant considerations.
- 5. Browse the content by clicking the + signs e.g., Discretionary Trust Deed Note: Content is displayed by document type e.g., Discretionary Trust Deed, Securities Trust Deed, Trust Stamp Duty Declaration.
- 6. Click the title to open the document e.g. TP001- Discretionary Trust Deed (Appointer and Guardian).

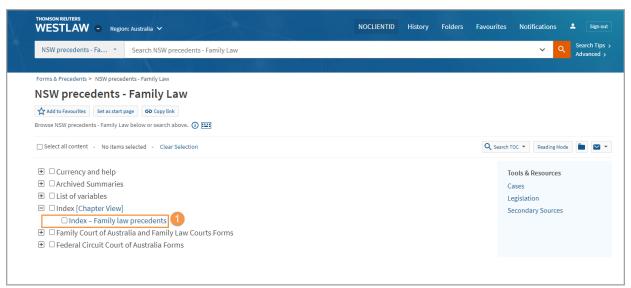




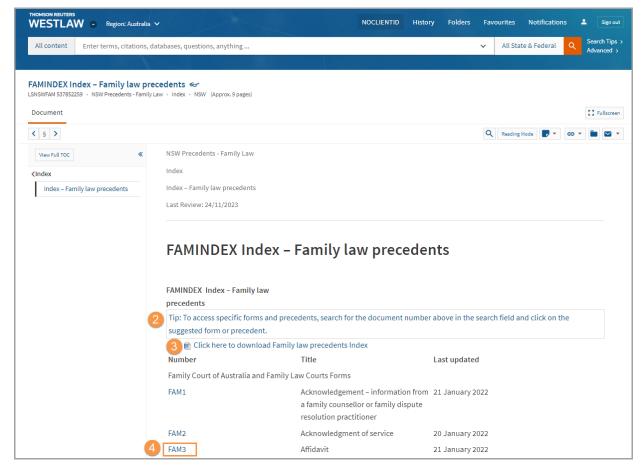
How to locate a document using the Precedents Index

You can use the index to locate a list of documents displayed by topic and form type.

 From the homepage click Forms and Precedents from Secondary Sources then select NSW Precedents – Family Law. To open the Precedents Index, click the title.



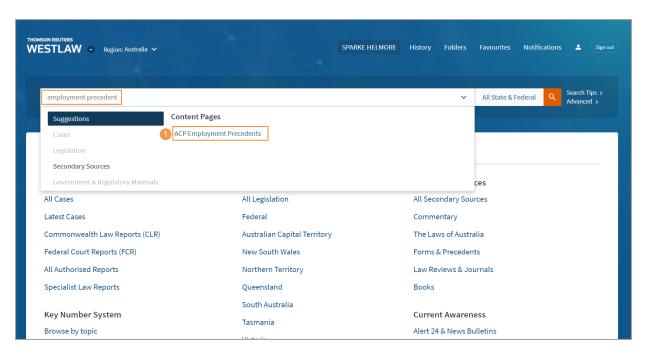
- 2. The **Tip:** provides search tips.
- 3. You can download the Index as a Word document.
- 4. Click on the unique identifier code to download any particular precedent, which is listed in alphabetical order e.g. FAM3.



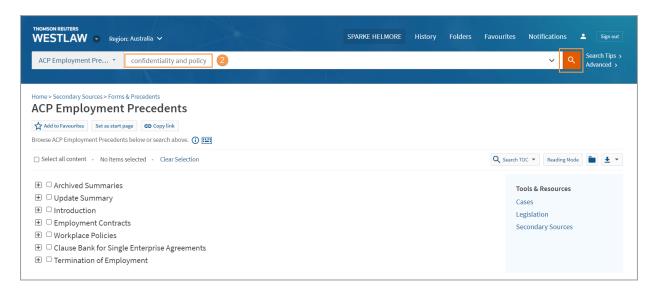
How to search for Forms and Precedents using Plain Language

You can conduct a plain language (no connectors) search to locate relevant precedents.

1. From the **homepage** type in the name of precedent topic **e.g.**, **employment precedent**, then select the title from the suggested content drop-down menu **e.g.**, **ACP Employment Precedents**.



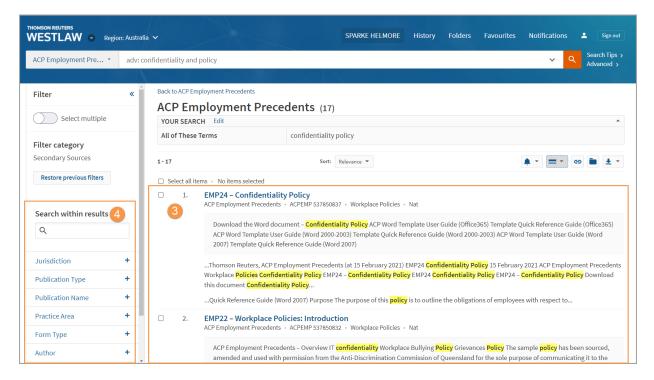
2. From the **Precedents** collection page enter your search terms, in plain language into the search bar e.g., confidentiality and policy then click **Search**.



3. Westlaw will automatically search all the "ACP Employment Precedents" for the term confidentiality and policy.

Note: The search result documents are listed in order of relevance which generally means documents with the highest number of hits, proximity of search terms, and search terms found in the title, are likely to be at the top of the list.

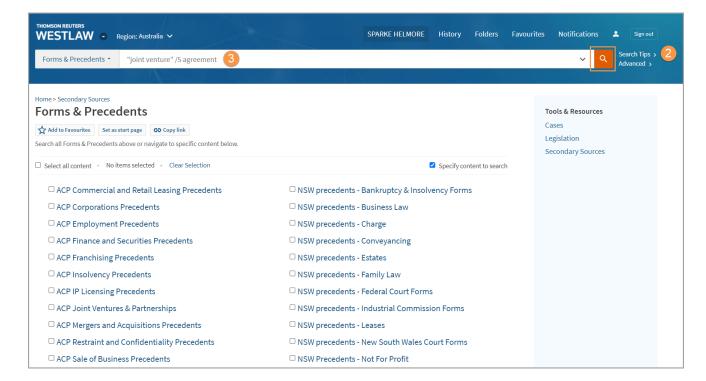
4. You can use the **post search filters** or **Search within results** on the left panel to refine the search results.



How to Search Forms and Precedents using Terms and Connectors

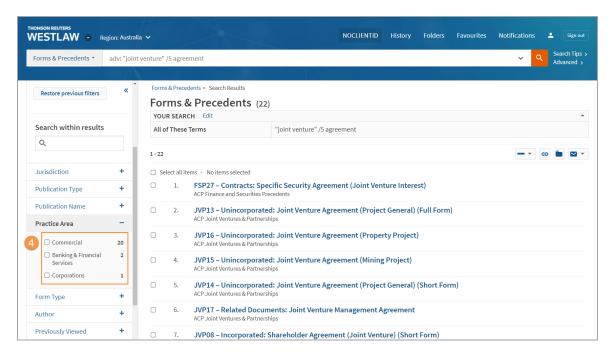
Terms and connectors can be used to provide precise and efficient content searches.

- 1. To search <u>all</u> Westlaw Australia Precedents, click <u>Forms and Precedents</u> from <u>Secondary Sources</u> on the Westlaw Australia home page.
- 2. Click "Search Tips>" to display a list of Terms and Connectors.
- 3. Enter "joint venture" /5 agreement into the search bar then click Search button.
 This will search all precedents for where the exact phrase "joint venture" appears within five words of agreement.





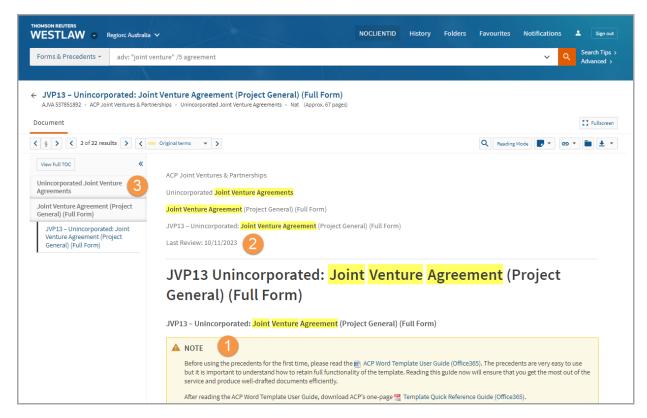
4. Use the **post search filters** on the left to refine the results list **e.g.**, **Practice Area**. **Note:** The Practice Area filter displays a list of practice areas where the documents appear **e.g.**, **Commercial**, **Contract**, **Banking & Financial Services**.



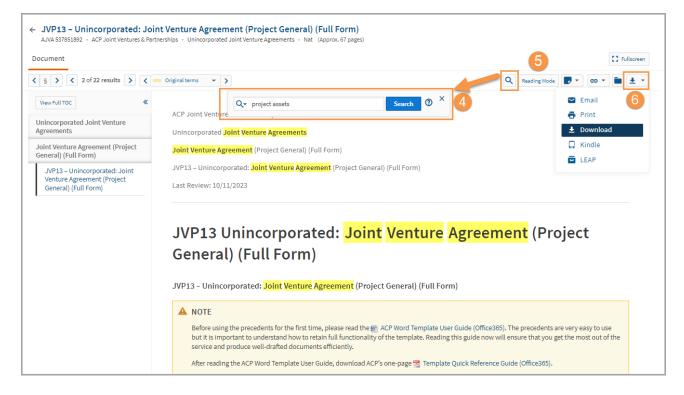
Document Features

The following features are available in the precedents.

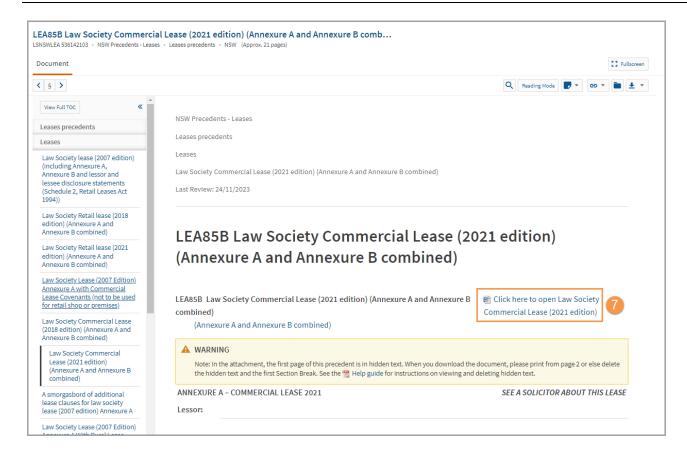
- 1. User Guide: Provides a Template User Guide to help maximise the functionality of the template.
- 2. Last Review: Provides information about the currency of this document.
- 3. **Table of Contents:** Use the Table of Contents on the left to navigate between documents.



- 4. **Search**: Click the **Search icon** and enter your search term/s then click the **Search button** to search within the document.
- 5. **Reading Mode**: Click **Reading Mode** to view the document in **Reading Mode** for a more streamlined reading experience.
- 6. **Download:** To download the precedent, click on the **Document Delivery Icon** and select **Download**.



7. **Download in Word:** Some precedents will also have a Microsoft Word icon that allows you to download an editable document to Microsoft Word.



Looking for more information?

To sign into Westlaw Australia visit: https://aulaw.thomsonreuters.com
For assistance using Westlaw Australia email: AUtrainers@thomsonreuters.com
For additional training materials visit https://support.thomsonreuters.com.au/product/new-westlaw-australia