

Westlaw AU

Working with Softdocs on Westlaw AU

This guide is designed to assist with Softdocs in Westlaw AU.

How to Access Softdocs in Westlaw AU

To view your collection of precedents:

1. Go to www.westlaw.com.au
2. Enter your OnePass Username and password
3. Click Sign In.

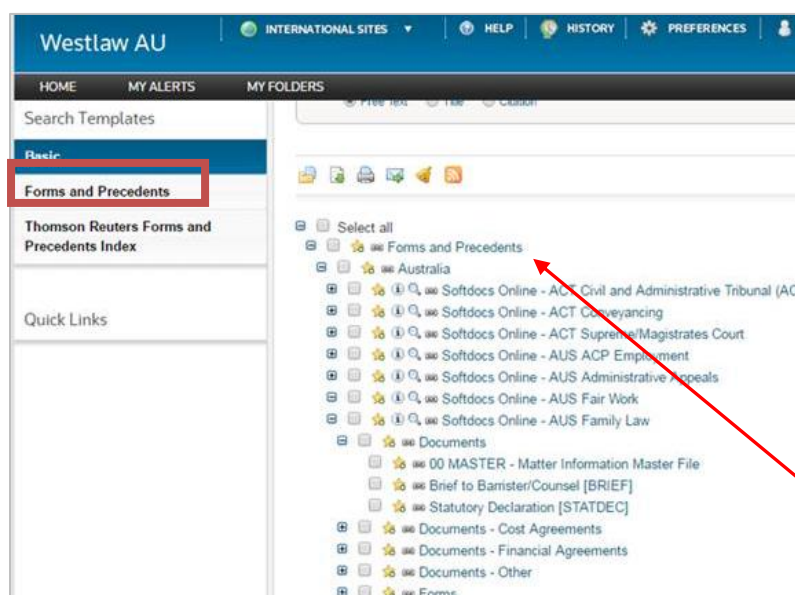
Working within Softdocs in Westlaw AU

1. First Time User
 - a. Locating a Precedent
 - b. Setting up Firm Information
2. Starting a Matter
 - a. Launching the Interview and Completing a Master Matter File
 - b. Saving the Answer file and Downloading the RTF
3. Uploading documents for Reuse

1. First Time User

1a. Locating a Precedent

To browse, begin by clicking on the Forms and Precedents folder in the Table of Contents. Note you may not need to do this step if you have chosen to display your Thomson Reuters products by Title. Alternatively search by precedent name via the Forms and Precedents search template.

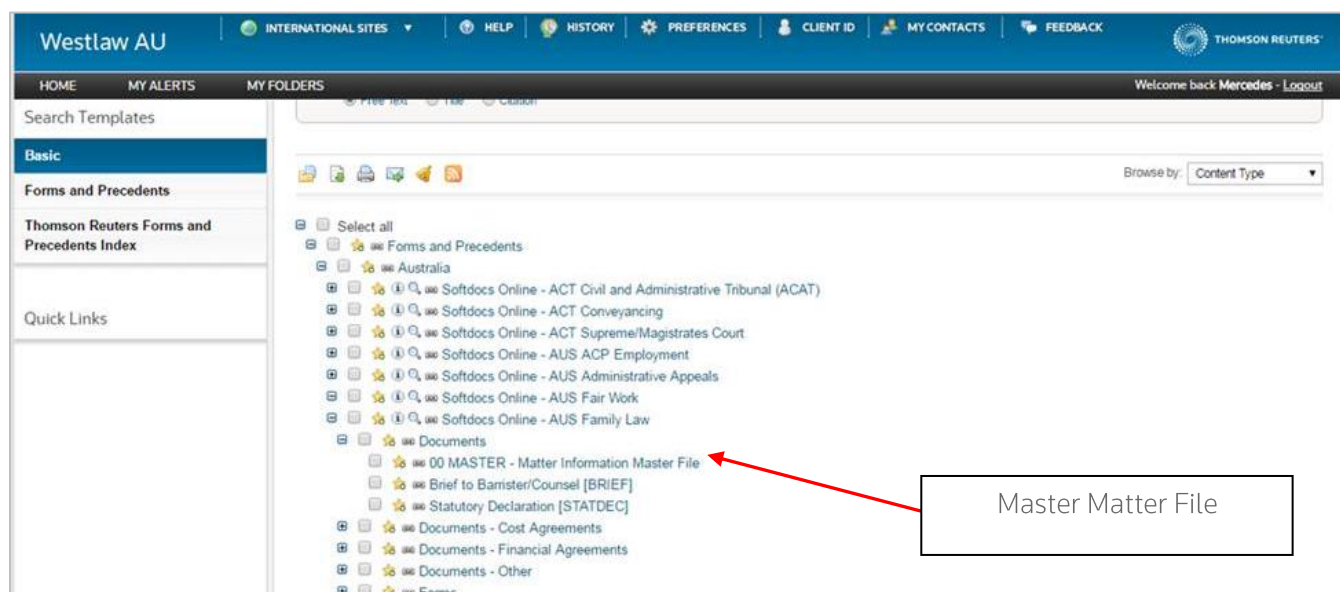


To browse, click on the Forms and Precedents Practice Area and navigate to the form you require by clicking the + symbol under the relevant Softdocs Suite.

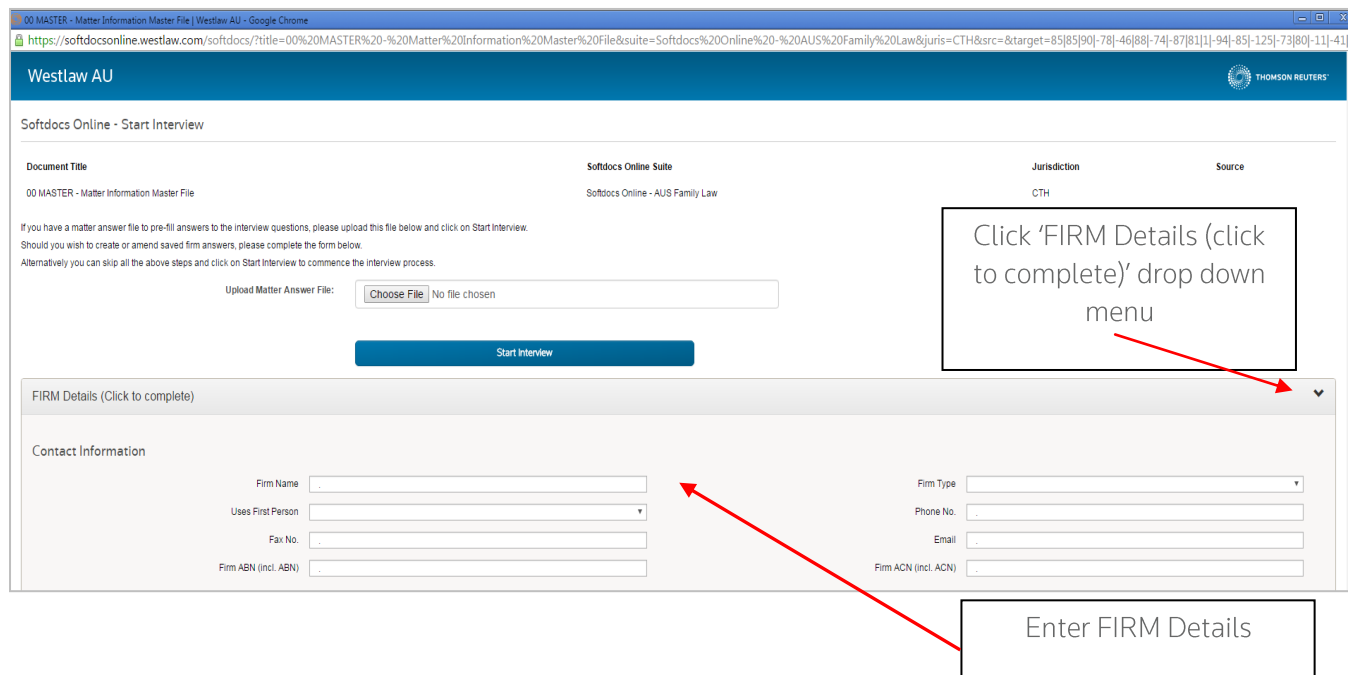
The first time you use Softdocs Online you should load your firm details so this data can be autofilled throughout your suite/s.

1b. Setting up Firm Information

To enter your firm details, locate the **MASTER – Matter File** (or any document, form or letter within your suite/s).



Click on the link and the *Start Interview* screen will launch. Select the option 'FIRM Details (click to complete)' and follow prompts.



Westlaw AU

Softdocs Online - Start Interview

Document Title	Softdocs Online Suite	Jurisdiction	Source
Affidavit General Proof of Signature (Family Court) [AFF07]	Softdocs Online - AUS Family Law	CTH	Family Law Courts

If you have a matter answer file to pre-fill answers to the interview questions, please upload this file below and click on Start Interview.
Should you wish to create or amend saved firm answers, please complete the form below.
Alternatively you can skip all the above steps and click on Start Interview to commence the interview process.

Upload Matter Answer File: No file chosen

FIRM DETAILS (Click to complete)

Contact Information

Firm Name:

Uses First Person:

Firm Type:

Phone No.:

Fax No.:

Email:

Firm ABN (incl. ABN):

Firm ACN (incl. ACN):

Choosing 'Firm' adds the word 'solicitors' to the firm name. Choose 'Lawyers' as an option if you do not require this.

Select from the drop down, choosing how you wish your correspondence sent

This will enable auto completion of some of the relevant information within the forms. These details will appear in ALL correspondence.

[NOTE: Please ensure that you have turned off the 'pop-up blocker' in your browser – see separate Guide *Softdocs Browser Set up* for further information on browser settings.]

Once you have completed the 'FIRM DETAILS (click to complete)' you can start a matter.

2. Starting a Matter

2a. Launching the Interview and Completing a Master Matter File

Each document, form or letter is launched by starting an Interview. For each new matter that you commence, you should first complete the **MASTER – Matter File** located within the Suite. This collects all common data on the matter and can be saved and reused to autofill subsequent documents for the matter.

To commence a new **MASTER – Matter File** locate the file within the Suite and click 'Start Interview'.

Westlaw AU

Softdocs Online - Start Interview

Document Title	Softdocs Online Suite	Jurisdiction	Source
00 MASTER - Matter Information Master File	Softdocs Online - AUS Family Law	CTH	

If you have a matter answer file to pre-fill answers to the interview questions, please upload this file below and click on Start Interview.
Should you wish to create or amend saved firm answers, please complete the form below.
Alternatively you can skip all the above steps and click on Start Interview to commence the interview process.

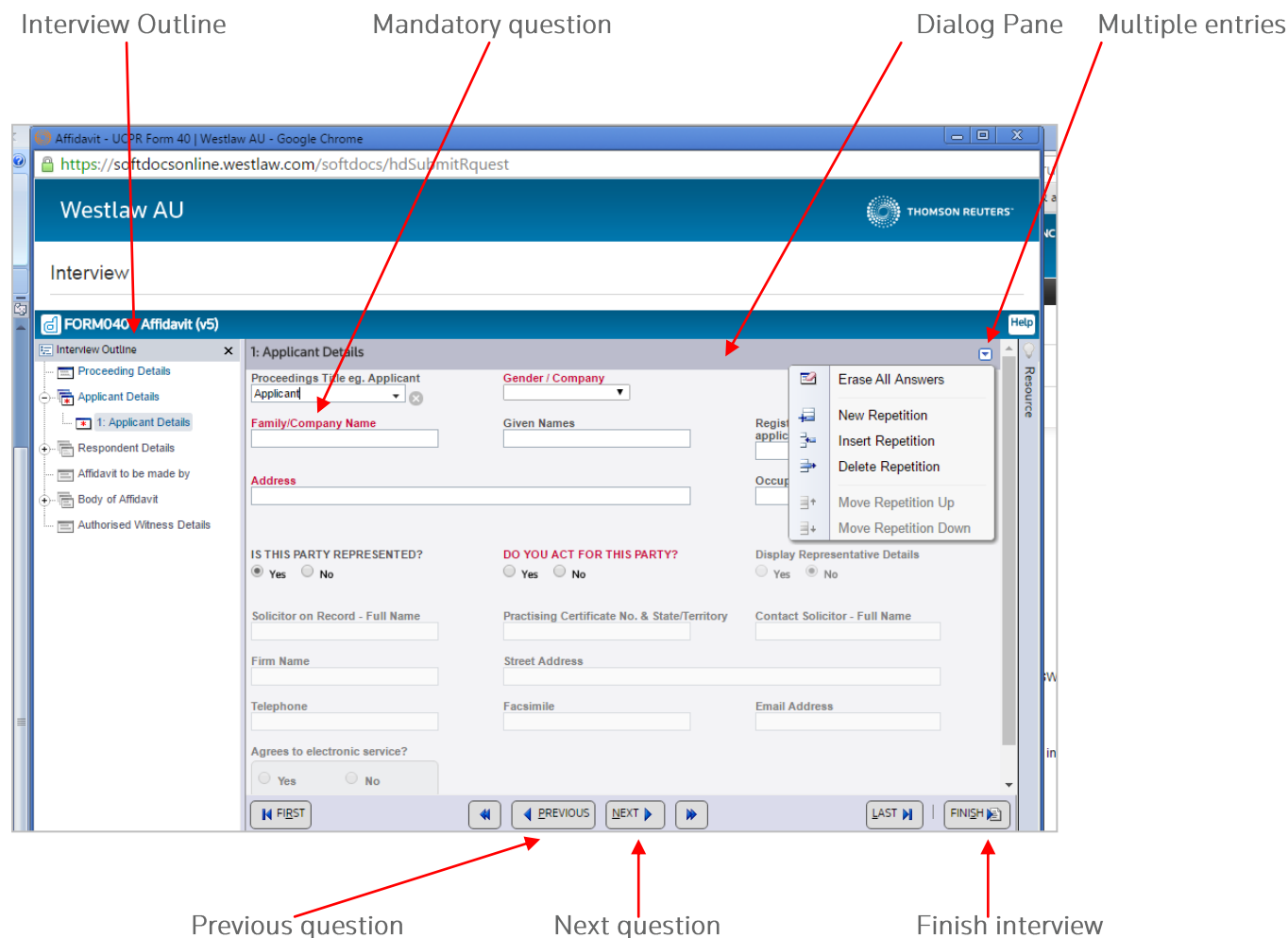
Upload Matter Answer File: No file chosen

FIRM DETAILS (Click to complete)

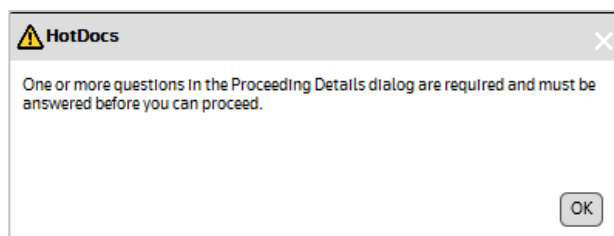
Click Start Interview to launch the interview

You will be presented with the Interview. The answers that you provide to these questions are used to assemble the form. You can move between the dialogs by either clicking the 'Next' or 'Previous' buttons on the bottom of the Dialog Pane OR by clicking on the links in the Interview Outline on the left.

If a variable in a dialog is mandatory, that variable will be highlighted in red. The related icon for the dialog in the Interview Outline will also have a red * until all the required questions in that dialog are answered.



When trying to move to the next Dialog Pane, you will receive the following message until such time as all the required questions are answered:



Once you have completed the Interview, you will be presented with the *Interview Complete* screen.

2b. Saving the Answer file and Downloading the RTF

At the *Interview Complete* screen you will see a 'Save Answer File' option. Save and rename the Answer file in order to identify it with your matter. An Answer file can be used to quickly produce and reproduce documents, forms and letters as it will pre-fill any previously answered questions, see 3. *Uploading documents for Reuse*.

The screenshot shows the 'Westlaw AU' interface with the 'Softdocs Online - Interview Complete' header. The main text states: 'The interview process is now complete and the document is ready for you to download. An Answer file is also available for download for future reference.' Below this, there are two sections: 'Document download' with a 'Download RTF' link, and 'Save answers' with a 'Save Answer File' link. A red arrow points from a text box to the 'Save Answer File' link. The text box contains the instruction: 'Save completed Answer file and rename it in order to identify it with your matter'. At the bottom of the interface is a 'Close' button.

Once you have saved the document, click 'Download RTF' to view the completed document.

This screenshot is identical to the previous one, showing the 'Westlaw AU' interface with the 'Softdocs Online - Interview Complete' header and the same text and links. However, a red arrow points from a text box to the 'Download RTF' link under the 'Document download' section. The text box contains the instruction: 'Download completed file using Download RTF'. The 'Close' button remains at the bottom.

3. Uploading Matter Answer file for Reuse

You can upload a MASTER – Matter File to pre-fill fields previously answered in a new document, letter or form associated with that matter.

To upload an Answer file click 'Choose File' and browse to the location you have saved the Answer file. Once uploaded, you are ready to Start Interview.

Westlaw AU

Softdocs Online - Start Interview

Document Title	Softdocs Online Suite	Jurisdiction	Source
Affidavit General Proof of Signature (Family Court) [AFF07]	Softdocs Online - AUS Family Law	CTH	Family Law Courts

If you have a matter answer file to pre-fill answers to the interview questions, please upload this file below and click on Start Interview.
Should you wish to create or amend saved firm answers, please complete the form below.
Alternatively you can skip all the above steps and click on Start Interview to commence the interview process.

Upload Matter Answer File: No file chosen

Upload saved Answer file using Choose file

After you have completed the Interview save the file as the *same version*, and not a new version, to ensure your new or amended answers are saved each time.

Confirm Save As

CALC_2460631.anx already exists. Do you want to replace it?

Select Yes to save the file as the same version each time

Note: Differences may appear depending on which browser you use. Using Google Chrome and Firefox enable the interview screen to expand to full screen. Using Internet Explorer launches a smaller pop-up box. These differences are related to the browser and not Softdocs Online. Please refer to separate instructions on browser settings & pop up blockers.