**WestlawNext Canada**

**Introducing WestlawNext Canada**

**Table of Contents**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing WestlawNext Canada</td>
<td>2</td>
</tr>
<tr>
<td>Using the Home Page</td>
<td>2</td>
</tr>
<tr>
<td>Searching</td>
<td>3</td>
</tr>
<tr>
<td>Order of Processing:</td>
<td>4</td>
</tr>
<tr>
<td>TIP:</td>
<td>4</td>
</tr>
<tr>
<td>Browsing</td>
<td>4</td>
</tr>
<tr>
<td>Find and KeyCite (Note up) by Name or Citation</td>
<td>6</td>
</tr>
<tr>
<td>Subscription Pages</td>
<td>7</td>
</tr>
<tr>
<td>KeyCiting (Noting up)</td>
<td>7</td>
</tr>
<tr>
<td>Viewing a Search Results List Page</td>
<td>12</td>
</tr>
<tr>
<td>Document Page Overview</td>
<td>13</td>
</tr>
<tr>
<td>Delivering Results</td>
<td>15</td>
</tr>
<tr>
<td>Research History</td>
<td>15</td>
</tr>
<tr>
<td>Adding Notes</td>
<td>16</td>
</tr>
<tr>
<td>Folders</td>
<td>16</td>
</tr>
<tr>
<td>Document Icons</td>
<td>17</td>
</tr>
<tr>
<td>What's included in my Subscription?</td>
<td>17</td>
</tr>
<tr>
<td>Where can I find Help?</td>
<td>18</td>
</tr>
</tbody>
</table>

WestlawNext Canada is accessed from: https://nextcanada.westlaw.com

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Accessing WestlawNext Canada
To access WestlawNext Canada, go to: https://nextcanada.westlaw.com. Enter your OnePass username and password into the fields provided and select Save my Username and Password if using your personal computer, so that you don't have to re-enter your password each time. Select Sign in. Select an existing client ID from the list provided or enter a new one and then select Continue.

Using the Home Page
You can search, find, browse or KeyCite all from the Home page. Also access international materials, tools, product information and subscription pages.

TIP: To return to the Home page, regardless of where you are within the service, select the WestlawNext Canada logo.

Figure 1: WestlawNext Canada Home page

A Federated search box.
B Browse content, access the McGill Guide, international materials and product information.
C Client ID, Legal Topics, Folders, History, Alerts, Help and Sign Off.
D Find and KeyCite a case, statutory provision or rule by name or citation.
E Browse Legal Topics.
F My Subscription pages.
Searching
Use the federated search box to simultaneously search the Primary Sources, Commentary and Court Documents in WestlawNext Canada.

1. Enter your search terms into the search box. (If your search does not contain any recognized Boolean connectors (e.g. /p, /s %, +20), the search runs a plain language search. See Boolean Searching below for more information.)

2. Select Search.

Note: If you ran a plain language search but intended it to be run as a Boolean query, a prompt would appear at the top of the results list inviting you to re-run the search as a Terms & Connectors search. You can change your search default in your preferences to always run a Boolean Terms & Connectors search. Select Preferences at the bottom of any page and then select the Search tab to access this option.

Boolean Searching
To run a Boolean Terms & Connectors search, preface your search with the adv: command and include recognized Boolean connectors in your query. Example: adv: picketing and (mall /p “shopping centre”)

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>a space (or)</td>
<td>Retrieve any or all terms. This is the default connector. Example: car automobile</td>
</tr>
<tr>
<td>&amp; (and)</td>
<td>Retrieve all search terms. Example: narcotics &amp; warrant</td>
</tr>
<tr>
<td>/p</td>
<td>Retrieve search terms in the same paragraph. Example: hearsay /p utterance</td>
</tr>
<tr>
<td>+p</td>
<td>Retrieve the first term preceding the second within the same paragraph. Example: appeal +p held</td>
</tr>
<tr>
<td>/s</td>
<td>Retrieve search terms in the same sentence. Example: design /s defect</td>
</tr>
<tr>
<td>+s</td>
<td>Retrieve the first term preceding the second within the same sentence. Example: palsgraf +s island</td>
</tr>
<tr>
<td>/n</td>
<td>Retrieve search terms within n terms of each other (where n is a number). Example: support /3 payment</td>
</tr>
<tr>
<td>+n</td>
<td>Retrieve the first search term preceding the second by n terms (where n is a number). Example: justice +3 McLachlin</td>
</tr>
<tr>
<td>”=“</td>
<td>Retrieve terms in this same order. Example: “attractive nuisance”</td>
</tr>
<tr>
<td>% (but not)</td>
<td>Exclude documents containing search terms following the percent symbol. Example: (support /3 payment % spousal)</td>
</tr>
<tr>
<td>! (Root Expander)</td>
<td>Contains all terms that begin with the root term. Example: negligent! retrieves negligent, negligence, negligently</td>
</tr>
<tr>
<td>Symbol</td>
<td>Definition</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>* (Universal Character)</td>
<td>Replaces one character only. Example: gr*w retrieves grow, grew; jur** retrieves jury, juror</td>
</tr>
<tr>
<td># (Exactly as typed)</td>
<td>Will not contain plurals or equivalents for the term. Example: #perm retrieves perm (but not permanent)</td>
</tr>
</tbody>
</table>

**Order of Processing:** Connectors are processed in the following order: “ ” (phrase), space (or), +n, /n, +s, /s, +p, /p, &, %. Parentheses can be used to change the order of the search.

**TIP:** Search the singular form of a word. This automatically retrieve the singular, plural, possessive and possessive plural forms. Example: child retrieves child, children, child’s and children’s.

Use the hyphenate form to retrieve all forms of a compound term. If you do not include hyphens you will not retrieve all variant forms. Example: good-will retrieves good-will, good will, goodwill.

**Searching Specific Content**
1. Select the content you want to search from the Browse - All Content page of the WestlawNext Canada Home page. Example: Cases and Decisions. A tab appears above the federated search box to indicate the content you are searching.
2. Enter your search into the federated search box and select Search.
   
   Alternatively, you can select Advanced to retrieve a customized template with pre-defined fields.

**Browsing**

**Browsing Specific Content**
To retrieve documents or access the Table of Contents for a content-type select its link in the Browse - All Content section of the Home page. There are four broad categories from which to choose: Primary Sources, Commentary, Court Documents and Finding Tools. (See Figure 1)

**Texts and Annotations**
Located under the Commentary category of the Home page, the enhanced Texts and Annotations page offers a library page for browsing and accessing titles, including ProView eLooseleaf titles. (See Figure 2)
Browsing Statutes, Rules and Regulations

Starting from the *Browse – All Content* section of the Home page, you can retrieve statutes, rules and regulations in several ways:

- Select the *Statutes and Regulations* or *Rules* link. Select a jurisdiction and then the applicable link.
- Select the *Source* tab (e.g. *FamilySource*) in the *My Subscriptions* section of the Home page to access links to statutes, rules and regulations for that specific area of law.

While viewing the text of a statutory provision, you can navigate to the other sections by selecting the *Previous/Next Section* arrow next to the section symbol (§) on the document toolbar.

To return to the Table of Contents, select the *Table of Contents* button on the document toolbar.
Combining Browsing and Searching

At any point while browsing WestlawNext Canada content you can enter keywords into the federated search box located at the top of the page to search the categories displayed. You can use the checkboxes, where available, to further narrow your search to specific sub-categories. (See Figure 3)

![Figure 3: Canadian Abridgment Digests Table of Contents page]

- **A** Tab indicates content to be searched.
- **B** Enable Specify Content to be searched checkbox to turn on checkboxes for sub-categories.

Find and KeyCite (Note up) by Name or Citation

To find and/or KeyCite a case, statute, rule or regulation by name or citation:

1. Select the **Find** button located next to the search box at the top of the screen.
2. Enter your information into the appropriate fields and then select the **Search** button (🔍).
Subscription Pages
The Source service(s) to which you subscribe appear in the My Subscriptions section of the Home page. Select the link to access a subscription’s Home page and search the content within it.

KeyCiting (Noting up)
KeyCite Canada is the citation research service adapted from The Canadian Abridgment’s suite of citator products (Canadian Case Citations, Canadian Statute Citations, Rules Judicially Considered, Regulations Judicially Considered) for WestlawNext Canada.

You can use KeyCite Canada to note up Cases and Legislation.

KeyCite Flags alert you to history and citing references that may impact the validity of that case or legislative provision.

Flags/Icons

💖 A red flag (KeyCite negative history or citing references) warns that the case may not be good law, indicating that the decision has been reversed, overruled, or has not been followed within the same jurisdiction or by the Supreme Court of Canada.

💡 A yellow flag (KeyCite cautionary citing references) warns that the decision has some negative history (varied, leave to appeal allowed or reconsideration/rehearing granted) or treatment, but has not been reversed or overruled. A yellow flag is also displayed if a treatment has been recently added, and has not yet been editorially analyzed.

_auc A blue H (KeyCite History) indicates that the decision has some appellate history and/or some related proceedings (e.g. motions, applications).

嵚 A green C (KeyCite references) indicates that the decision has no history, but there are treating cases or other citing references to the decision. For legislation, a green C indicates that the legislative provision has treating cases or other citing references.

Note: The most negative treatment is displayed next to the flag at the top of the case and includes a link to the underlying document, if available.
Explanation of KeyCite Treatments for Cases

- **Recently Added:** Cited case discussed in decision(s) recently added to the service. (Temporary designation, to be replaced by editorially assigned treatment when it becomes available)

- **Followed:** Principle of law in cited case adopted or decider's reasoning applied.

- **Distinguished:** Cited case inapplicable because of difference in facts or law.

- **Not Followed:** Cited case expressly overruled, not applied or judged to be bad law. Some consideration given to cited case.

- **Considered:** Some consideration given to cited case.

- **Referred To:** Cited case being referred to without comment.

To access specific KeyCite Canada information:

- Select the KeyCite flag while viewing a case or legislative provision.
- Select the **History** and **Citing References** tabs at the top of the case or legislative provision.

**Tip:** Select the **Powered by KeyCite Canada** logo at the top of any case or legislative provision to view general information about KeyCite Canada.

![Figure 4: KeyCite tabs for 2004 SCC 68](image)

**History**

Select the **History** tab to view the direct history of a case. Direct history is also displayed in graphical view.
Related Proceedings

Where there are interlocutory matters, for any of the levels of the case history, you will find at the top of the left frame a link titled Related Proceedings available for this Case History. Select this link to navigate to the Related Proceedings section to access the related proceedings document.

Figure 5: History page showing direct history and link to related proceedings

The related proceedings document includes its own citation, a link to the decision you came from along with the main history of the case, and the related proceedings information. Where available, it will also give you a statement of proceedings with information about the nature of interlocutory matter. (See Figure 6)
Figure 6: Sample related proceedings document
Citing References

Select the **Citing References** tab to view a list of cases and secondary sources where the case or legislative provision has been cited. The number indicated on the tab specifies the number of documents citing this case.

![Sample Citing References page](image)

**Figure 7**: Sample Citing References page

- **A** Narrow your list of citing references by selecting a document type on the left side.

- **B** Use the filters located in the **Narrow** section on the left side and/or enter search terms into the **Search within results** text box to further narrow your list.

- **C** Choose an option from the **Sort By** drop-down list to change the order in which the citing references are displayed.

- **D** The Depth of Treatment provides a visual on how extensive the discussion about the cited case is.
Viewing a Search Results List Page

After running your search, an overview of the search result is displayed on the right side. Select a content category from the View section to display the result list for that category only. If, however, you selected a specific content to search, such as Cases and Decisions, the result list for that content type automatically appears.

**Figure 8:** Search Results List page for Cases and Decisions

- **A** Select a content-type to view in the right frame.
- **B** Navigate to next or previous 20 hits.
- **C** By default results are sorted by relevance. Re-sort the list by date, most cited or court level.
- **D** Create an alert and automatically receive updates on any new results for a search you conducted.
- **E** Choose from three levels of detail to be shown for each result.
- **F** Save documents to a folder for later use.
- **G** Print, email or download one or more documents from the results list.
- **H** Link to similar cases in the Canadian Abridgment Digests.
- **I** Visual indicators that a note was added, the document was previously viewed or saved to a folder.
- **J** Right frame shows document title, court date and citation or each case along with the Abridgment Classification and a snapshot of your search terms within the document.
- **K** Narrow your results using a variety of customized filters based on content-type selected in the View section.
Applying Filters in the Narrow section

Applying multiple filters at one time: To enable multiple filters to be applied at the same time, select the Select Multiple Filters button, if necessary. Select the filters you want and then select Apply Filters.

Applying one filter at a time: To apply one filter at a time, select Cancel, if necessary, and then choose the filter you wish to apply. The result list automatically updates to display only those results that match your filter option.

Select Undo Filter to return to the full result list.

![Figure 9: Filter buttons](image)

Document Page Overview

To view a document in your result list, select the document's title. Each document in a search result contains highlighted search terms for easy browsing and links to cited documents.

The document toolbar for a case provides several navigational and other tools. They are:

![Figure 10: Document toolbar](image)

1. **Return to list:** View the Result List.
2. **Previous/Next Document:** View the next or previous document in your search result.
3. **Previous/Next Term:** View the portions of each document that contain your search terms.
4. **PDF File:** Retrieve the decision in PDF format, where available.
5. **Switch between Languages:** Switch between languages, where available.
6. **Go to:** Jump to a specific portion of the document (e.g. headnote, counsel, opinion).
7. **Create KeyCite Alert Entry:** Create a KeyCite Alert entry for the document. Complete the steps in the KeyCite Alert wizard and select Finish to save your entry in the KeyCite Alert Directory on Westlaw Canada.
8. **Search Text in the Document:** Enter terms to search within the document.
9. **Display Options:** Adjust the document font styles, sizes and margins.
10. **Annotations:** Add a note to the top of the document or show or hide notes you’ve already added.
11. **Save to Folder:** Save the document to a folder.
Select a Delivery Method (Email, Print, Download): Email, print or download the document. You can also send it to Case Notebook.

Full Screen Mode: Expands the document view for easier viewing of annotations.

Case Views and PDF of Original Decisions & Law Reports

After running your search, you may choose to view a different case view from the list located in the Case Views section next to the full text decision. The Case Views available include one or more of the following:

- **Source** – Thomson Reuters’ view with Abridgment classifications and headnotes.
- **L.A.C.** – Labour Arbitration Cases with C.L.B. classifications and headnotes.
- **C.L.A.S.** – Canadian Labour Arbitration Cases with C.L.B. classifications and headnotes.
- **A.C.W.S.** – All-Canada Weekly Summaries with C.L.B. classifications and headnotes.
- **D.L.R.** – Dominion Law Reports with C.L.B. classifications and headnotes.
- **Supreme Court of Canada** – English and Supreme Court of Canada – French.

To access the PDF of the original decision, select **Source** from the Case Views section and then select the **PDF Original** button located on the toolbar.

To access the PDF law report of another decision, select the applicable Reporter from the Case Views section and then select the **PDF Law Report** button located on the toolbar.
Delivering Results

To print, email, or download a document or list of documents, complete these steps:

1. Select the Delivery Method (print, email or download) icon on the toolbar, or select the arrow next to the delivery icon and choose your option from the menu.

![Figure 12: Delivery option](image)

2. A dialog box is displayed, which includes two or more of the following tabs:
   - **Layout and Limits tab**: Select the checkboxes for the elements you want to include in the document, such as expanded margins for notes.
   - **Content to Append tab**: Select the checkboxes for the content you want to append to the document from the KeyCite lists and Other Related Information section.
   - **Recipients tab**: This tab is available if you select the Email option.
   - **The Basics tab**: This tab is available if you select the Download option.

3. Select Print, Email or Download. If you select Print or Download, a Preparing for Print or Preparing for Download dialog box is displayed.

**Note**: WestlawNext Canada remembers your preference making that delivery method your new default.

Using the Delivery Queue

Print and download requests are saved in the delivery queue in the lower-right corner of the page until midnight of the current day and can be printed or downloaded at any time prior to expiration. Select the View Delivery Queue icon to display the items in the delivery queue. Select an item to print or download it.

Research History

To return to previous work, select History located in the upper right corner of any page. A list of the four most recent documents you have viewed and searches you have run is displayed. Select a link to return to a document or search. You can also select View all next to Recent Documents or Recent Searches to display the History page for a list of all the documents you have viewed and searches you have run.

You can keyword search the full text of any documents or use filters to find specific documents or searches within History.
Notes: Although history is saved for up to one year, you can display it for a specific time period by choosing an option from the Date drop-down list.

You can also access your most recent searches by selecting the Recent Searches icon located next to the search box.

![Recent searches drop-down list](image)

**Figure 13**: Recent searches drop-down list

Adding Notes

- **To add a general note to the top of the document**: Select the Annotations icon on the document toolbar and choose Add Note. The Notes box is displayed at the top of the document. Type a note into the text box and select Save.

- **To add a note to the right of selected text**: Select the text where you want to insert the note and choose Add a Note from the pop-up menu. Enter a note into the text box and select Save.

You will not see the Annotations options if your password does not include this option.

Folders

WestlawNext Canada helps you organize and manage your research by storing your documents and text snippets into folders. Case law and legislation documents that are added to folders will always reflect the current state of the law. Folders and any linked documents remain indefinitely and documents can be re-accessed from folders without additional fees for up to one year.

**Saving to a Folder**

To save the document you are viewing into a folder, select the Save to Folder icon on the document toolbar. Select the folder in which you want to save the document and select Save.

To save documents from a result list, select the checkboxes next to the documents you want to save and select the Save to Folder icon. Select the folder where you want to save the documents and select Save.

To save selected text (snippets) into your current folder, highlight the text you want to save and choose Save to... from the pop-up menu.
To view documents and snippets you have saved into your current folder, select your current folder. To view documents/snippets saved into another folder, select **Folders** at the top of any page and then select the name of the folder containing the documents.

**Changing and Creating New Folders**

To create a new folder, do one of the following:

- Select **Folders** at the top of any page. The Folders page is displayed. Select **New**. The New Folder dialog box is displayed. Enter the name of the folder into the **Folder Name** text box, select a location for the new folder, and select **OK**.

- While viewing a document or a result list, select the **Save to Folder** icon, and then select **New Folder**. Enter the name of the folder into the **Folder Name** text box, select a location for the folder, and select **OK**.

The current folder is the folder that is displayed on the right side of the Home page and at the top of all other pages.

To change the current folder, select the current folder and then select the **Change Folder** icon ( ![Folder Change Icon](image)) The Change Folder dialog box is displayed. Select the folder you want and then select **OK**.

**Document Icons**

WestlawNext Canada utilizes a variety of document icons. They are:

- ![Folder Change Icon](image) **Previously Viewed**: Indicates that you've viewed the document within the last 30 days.
- ![Folder Change Icon](image) **Saved to folder**: Indicates that you have added the document to a folder.
- ![Folder Change Icon](image) **Note Added**: Indicates that you have added a note to the document.
- ![Folder Change Icon](image) **Annotation in Folder**: Add a note to a document within a folder.
- ![Folder Change Icon](image) **KeyCite References**: A variety of icons appear to indicate the status of the case or statutory provision.
- ![Folder Change Icon](image) **Legal Memoranda**: Indicates the case has associated legal memos.
- ![Folder Change Icon](image) **Court Documents**: Indicates the case has associated court documents (motions, facta and pleadings).

**What’s included in my Subscription?**

To determine what content is included in your subscription, select the **Product Information** tab on the Home page and see the **My Content** page.
Where can I find Help?

- **Product Support:** Included with your subscription. **Call:** 1-800-387-5164 or 416-609-3800 (Toronto).
  - **Technical:** Weekdays: 7:00am – 9:00pm (ET). **OnePass and Log in Issues:** 24/7
    o Email: TechSupport.LegalTaxCanada@tr.com
  - **Research:** Weekdays: 8:30am – 5:00pm (ET), excluding holidays
    o Email: ResearchSupport.LegalTaxCanada@tr.com

- **Within WestlawNext Canada:**
  - Select the Live Chat link located at the bottom of any page for immediate research support.
  - Select the Help link located at the top of any page or look for the Need Help/Training? section located on the source-specific pages to access our Customer Learning Centre (http://learning.thomsonreuters.ca) where you will find Quick Reference Cards/Guides and video tutorials or sign up for a live public webinar facilitated by a Certified Professional Learning Consultant.