PEOPLEMAP ON WESTLAWNEXT

USER GUIDE

THOMSON REUTERS™

Customer Service

WestlawNext PeopleMap

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For more information, contact your representative at 1-888-728-7677.

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1 Welcome to PeopleMap on WestlawNext

PeopleMap on WestlawNext is the premier public records solution now available on the most advanced legal research platform. It gives you the freedom to perform all of your legal research in one place, saving you time and energy.

Reasons to use PeopleMap on WestlawNext

- Seamless integration with WestlawNext content for a more comprehensive and efficient public records search
- Filtering and relevancy ranking bring the most pertinent results to the top
- Enhanced graphical displays help you identify hidden connections faster
- Web analytics bring together a subject's Web and social media activity
- Global search and templates to research the way you want
- Customization of reports and searches gives you the flexibility to create a tailored research experience
- Deep linking and connections between PeopleMap and Company Investigator for a complete due diligence package
- Full-text search of all the underlying content with source , coverage and reported date information
- Integration with Firm Central and Concourse allow you to run global searches and access foldered information

2 Getting Started

Accessing PeopleMap on WestlawNext

PeopleMap is accessible on WestlawNext. To access PeopleMap:

1. Log in to WestlawNext using your **WestlawNext OnePass Username and Password**.
2. Select or enter the appropriate **Client ID** and click **Continue**.

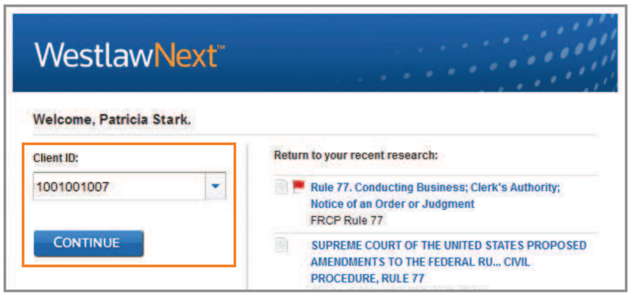


Figure 2-1. Select or enter Client ID on WestlawNext

3. After selecting or entering your Client ID, you have two ways to search for public records: a simple global search from the WestlawNext Home page of basic criteria like a person name and address or a template search for users who frequently search for public records or would like a more customized experience.
4. **People**, **Businesses**, and all available underlying **Records** are searchable together on WestlawNext:
   - **People:** Searches all available people records, with access to **PeopleMap** reports, web analytics, real-time information, and visualization research tools including graphical display.
   - **Businesses:** Searches all available business entities, with access to **Company Investigator** reports and **Company Family** trees.
   - **Records:** Searches public records across all available content sets with result list and full-text information. Records represents a complete replacement for WestlawClassic Database content searching.

   If you do not see a Public Records link, please call Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889) or your sales representative to gain access.

Figure 2-2. Global search or template search via WestlawNext Home page

3 Search Options

Overview

Use the **WestlawNext Global Search box** to search all available people, businesses, and records in parallel with a wealth of other WestlawNext primary and secondary legal content, including Caselaw, Statutes, Regulations, Secondary Sources, Briefs, Trial Court Documents, Experts, Jury Verdicts & Settlements, and more.

PeopleMap looks for public records terms entered as free-text words in the **WestlawNext Global Search box**. Public Records searches may be triggered when inputting one or more of the following types of information:

- Person name
- Address (full or partial)
- Social Security Number (in combination with a name)
- Date of birth (in combination with a name)
- Phone number
- Drivers license number
- License plate number
- Vehicle identification number
- Business name
- Ticker symbol
- Federal employer identification number
- DUNS number (Dun & Bradstreet)
- Email address
- Global search will also run fielded boolean terms and connector searches similar to T&C searches as done in WestlawClassic.

Use the **Public Records Category Page templates** to perform a more refined search. Power users tend to favor researching in this dedicated public records solution for efficiency and search flexibility. Using template fields is the most precise way to find exactly the information you need.

Whether searching via the **WestlawNext Global Search box** or **Public Records Category Page templates**, there are many ways to search the system:

- Free-text search in the Global Search box – the system determines the best search to be processed.
- Template search via Public Records Category Page – the system processes the search against the fields submitted by the user.
- Fielded Boolean Terms & Connectors search in the Global Search box – this search is honored just like a Westlaw Classic Public Records search for the Records workflow.

Public Records – Global Search

1. To conduct a **Global Search**, enter terms, such as the name of the person and state into the Global Search box and click **Search**. PeopleMap determines the best search to process when free-text searching in the Global Search box.

Figure 3-1. Global search

2. When a public records search is identified, the Public Records category on the left will contain counts. The Public Records category on the right-hand side is split into categories of People, Businesses, and Records with applicable counts.

   Note that actual counts may change based on factors such as permissible use selections and the addition of results added below direct result hits that may be applicable, including those with close household and business associations.

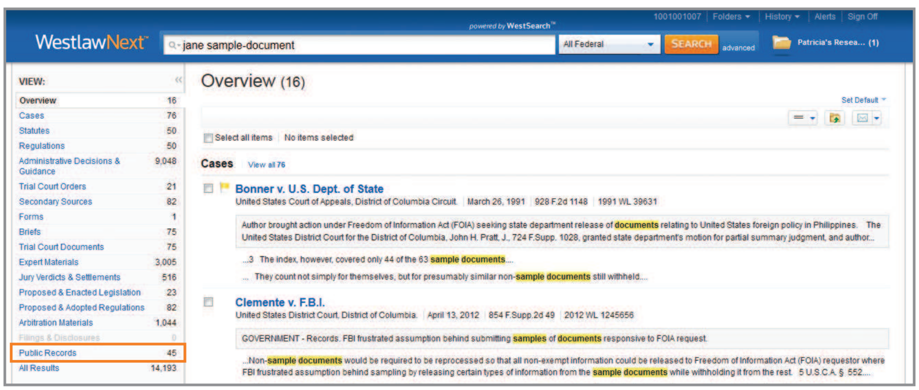


Figure 3-2. Public Records within WestlawNext search results

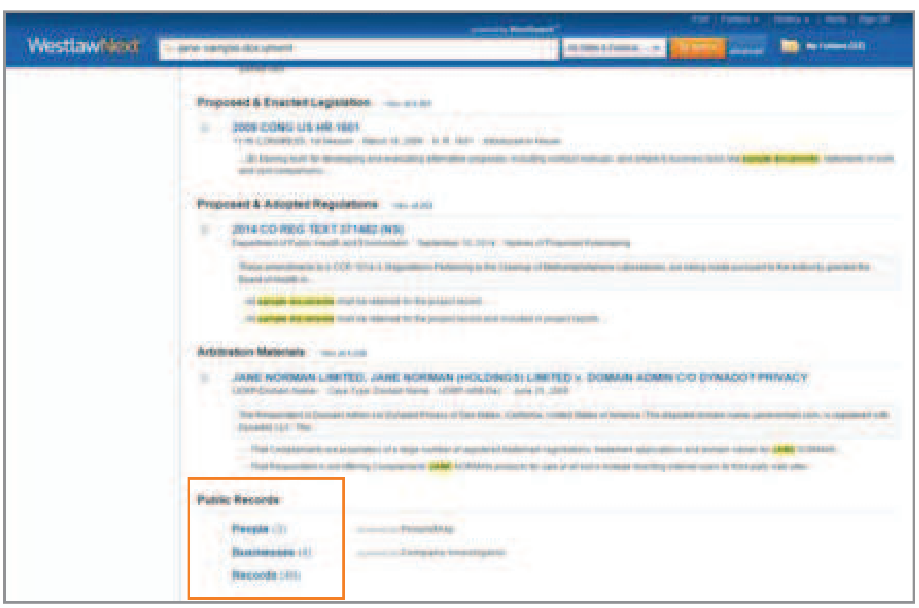


Figure 3-3. Public Records Categories within WestlawNext search results

Public Records Category Page – Template Search

1. To conduct a **Template Search**, click the **Public Records** link located within the **Browse** options on your WestlawNext Home page. PeopleMap will process the search against the fields submitted by the user when conducting a Template Search on a Public Records Category page.

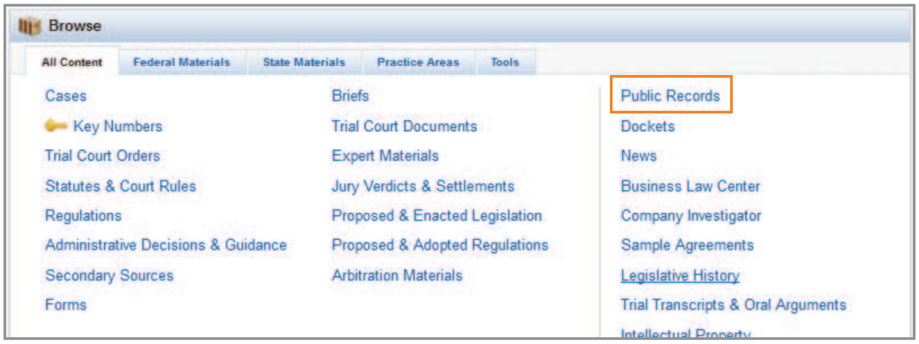


Figure 3-4. Public Records link for template search

2. The main Public Records Category Page template searches all available People, Businesses, and underlying full-text records through one easy search. Enter the data you wish to utilize for your public records search. You can search by name, social security number, business information, phone number, location, and more. You may also use the Search box at the top to build a query.
3. On the right, click **All Public Records Templates** for more focused templates with content-specific search options.

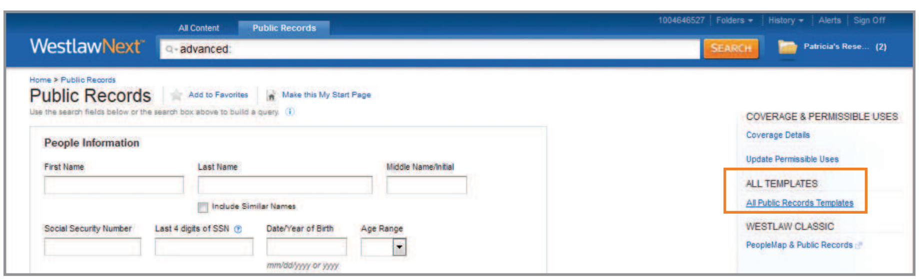


Figure 3-5. All Public Records Templates link for template search

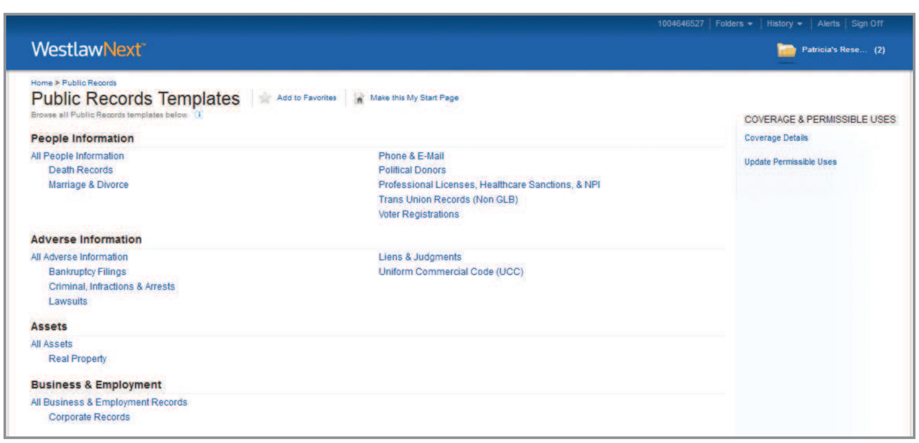


Figure 3-6. All Public Records Templates

4. Make any one Category Page your WestlawNext Start Page and mark as many as you like as Favorites that appear on the WestlawNext homepage.

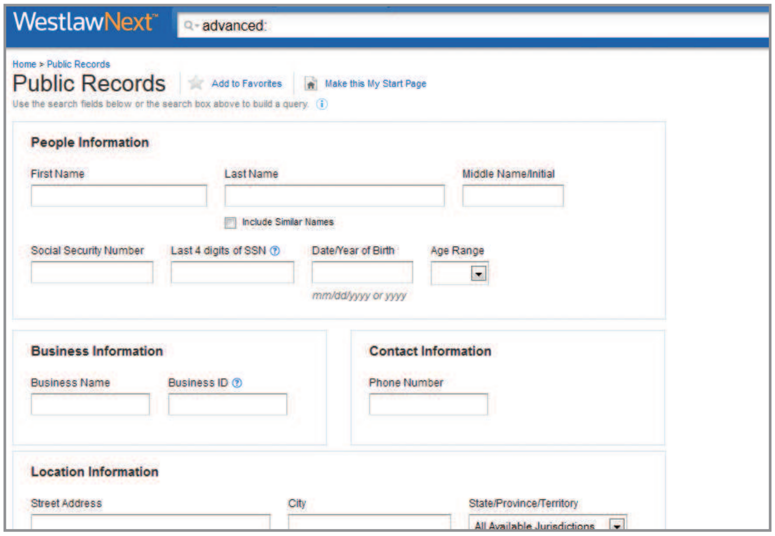


Figure 3-7. Public Records Category Page search templates

5. Enter terms into one or more of the Public Records Category Page search templates (or build a query in the Search box) and select the results to display first – People, Businesses, or Records – by clicking the appropriate radio button.

Note Selecting a results category is not required and it will go to People by default in the main Public Records template and People Information template. All other more granular templates default to the Content Category of the template in the Records workflow. Easily toggle to the other categories. By selecting a results category, the preference selected will apply the next time you search with that particular template until you change the results category setting.

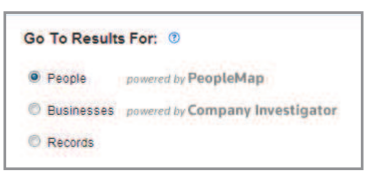


Figure 3-8. Select results – People, Businesses, or Records

6. Click Search.

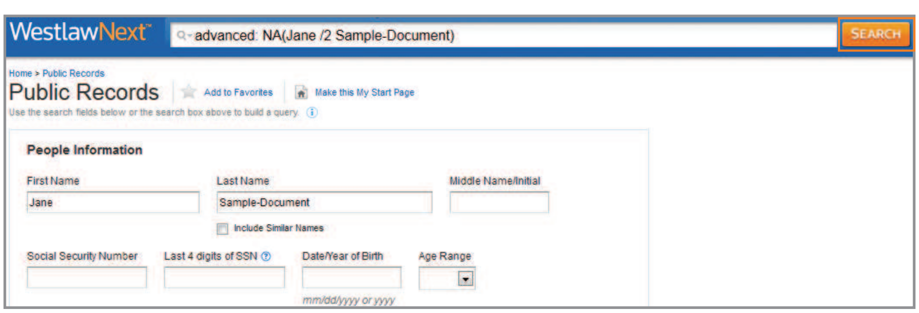


Figure 3-9. Click Search after entering data into one or more Public Records category search templates or building a query

Permissible Use

A Permissible Use menu window will open the first time entering public records in each WestlawNext session. You are required to confirm or update your permissible use(s) to access public records data or select No Permissible Use, if none exists under federal and state laws governing the data. There are three (3) drop-down boxes for which you will select permissible uses or No Permissible Use. Click the drop-down arrow for each box to choose the appropriate selection.

Note Permissible Use selections are valid for the session in which you are working but may be changed at any time by clicking the **Update Permissible Uses** links found on the Public Records Category and Results pages.

Set as Default checkboxes appear to the right of each permissible use menu. To maintain your permissible use settings as default settings in subsequent research sessions, click the **Set as Default box(es)** before clicking **Next**. Permissible Use defaults last for 6 months. If you set a Permissible Use default setting, changing the value is only good for the session in which you are working unless you also select the corresponding Set as Default checkbox. If the checkbox is not selected, the prior selection will remain as the default.

The Permissible Use categories include:

1. **GLB** – Use of this data is limited by the Gramm-Leach-Bliley Act (GLB) and may only be used for specific non-FCRA (Fair Credit Reporting Act) purposes. It governs credit-header-type data, which is the identifying information that accompanies consumers' credit reports – name, name variations, address, former addresses, telephone number (including unlisted numbers, if known), date of birth (usually limited to month and/or year), and Social Security Number.
2. **DPPA** – Use of this data is limited by the Driver's Privacy Protection Act (DPPA) and state law. It governs drivers' license and motor vehicle-type data.
3. **VOTERS** – Use of this data is limited by state law privacy restrictions. It governs voter data.

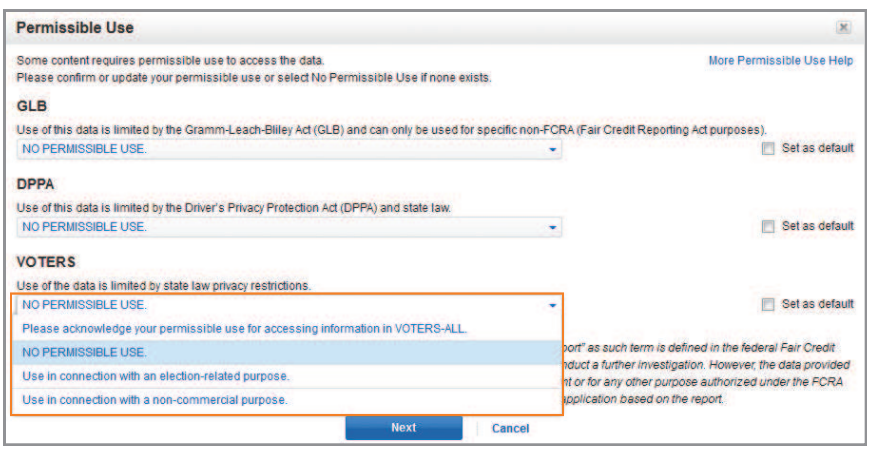


Figure 3-10. Select Permissible Use or No Permissible Use/Set Default Permissible Uses

4. After selecting your permissible uses, click **Next** to run your search and view the results.

Note If you previously selected the checkbox to save your WestlawNext password on the WestlawNext OnePass Sign In page, you will be directed to re-authenticate your password before obtaining access to public records. Enter your password and click **Sign In**. This additional security check protects users and public records data by preventing someone else from signing in and accessing public records data without the user's password credentials.

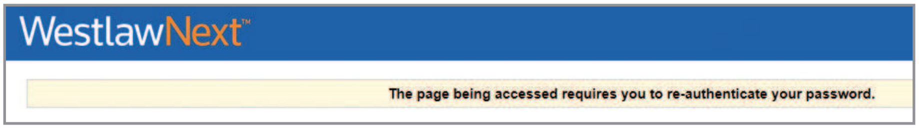


Figure 3-11. Re-authenticate password

5. After re-authenticating your password, your Public Records search results will display. Public records are automatically broken out by People, Businesses, and Records categories (with counts). The user may navigate to the other categories to find additional relevant data without the need to craft another search.

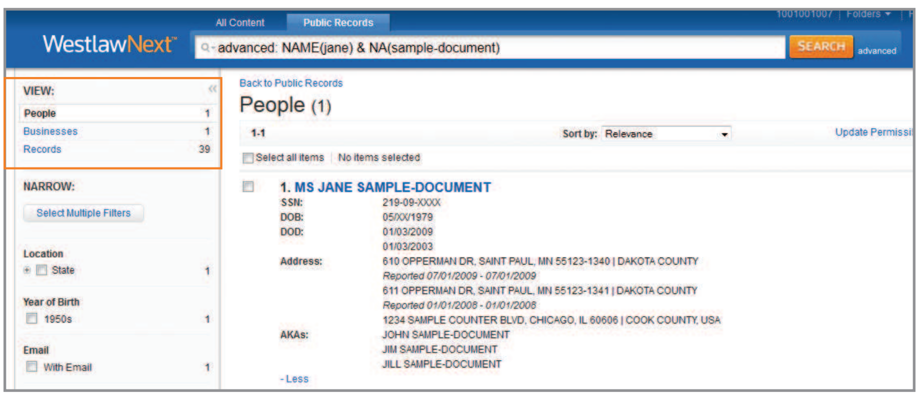


Figure 3-12. Public Records search result categorized by People, Businesses, and Records with counts

Note Category counts and actual counts on the result lists may differ at times. Differences may be due to: (a) initial counts being approximations; (b) permissible use selections may modify the amount of content displayed; or (c) when additional potentially relevant results are folded into the result list, including people who have close household or business associations with the subjects directly matching the query. Added results are always ranked below the direct search hits.

Note If at any time you need to modify your Permissible Use(s), click on **Update Permissible Uses** found on the right side of the all Public Records templates page, or in the upper right corner of your search results.

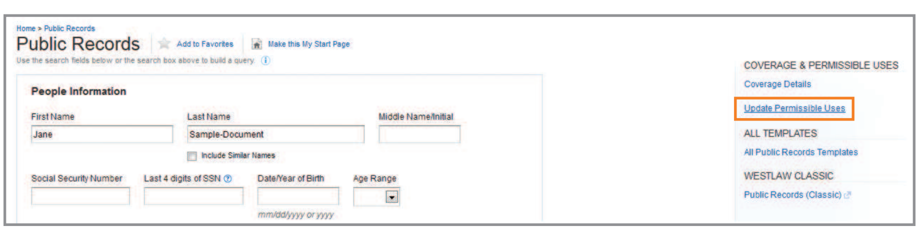


Figure 3-13. Update Permissible Uses on Public Records Template page

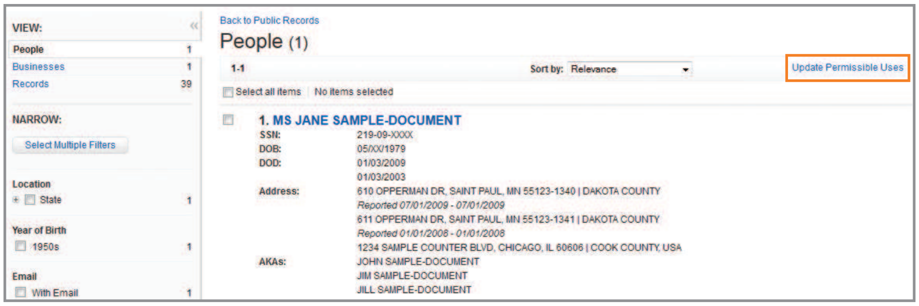


Figure 3-14. Update Permissible Uses on People Results page

4 PeopleMap Results

Overview

The People Results list is powered by PeopleMap on WestlawNext, the next generation in comprehensive public records research on people and their connections to other people, businesses, assets, adverse information and employment information. Find your subject and access reports, web analytics, graphical displays, and mapping features.

People Results

After conducting a search, you will navigate to People Results, a list of individuals that may be the subject of your search.

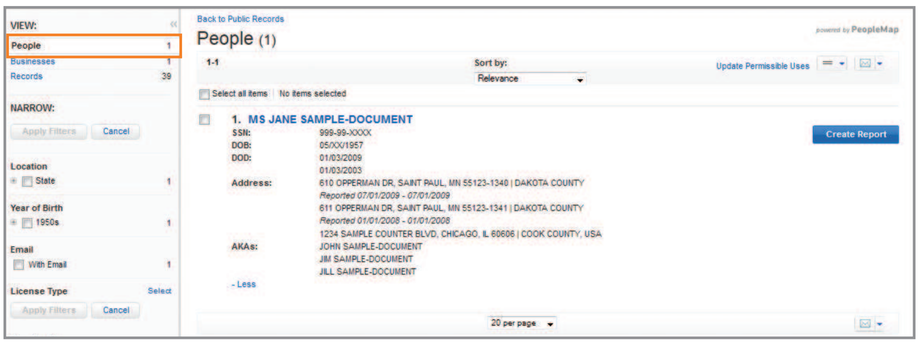


Figure 4-1. People Results and tools

Update

The Update button runs a real-time search in the Experian Credit Header file, providing an easy way to instantly view new and updated information for new addresses, phone numbers, dates of birth, name changes, and social security numbers associated to the subject. The same Update information is available in the PeopleMap Premier report, described below, but often the Update feature is a quick way to find out if there is a new address or better phone number contact info when there is no need for a report.

Note Users must have access to Experian Credit Header data and have a GLB permissible use to interact with the Update feature and data.

The People Results page includes tools to filter results, sort results, deliver/download results, records and reports, access full person records, and create online PeopleMap Reports. The People Results tools include the following:

FILTER (NARROW) PEOPLE RESULTS

People Results Filtering allows you to efficiently narrow your results and locate the correct subject. Filtering options display based on the result list items:

- Location: State, City, and County filters
- Year of birth: drill down to specific decades and years of birth
- Phone number: filter to only those subjects with a phone number
- Email: filter to only those subjects with an email address

- Business/Employment: filter to only those subjects with business and/or employment information
- Household information: filter by multi-person household
- License type: filter by one or more license types (e.g., professional license, firearms, etc.)

Filter by Location

Based upon availability of Public Records Results data, you can filter by state, county, and/or city. The Location count is listed to the right of the State checkbox and its plus sign. To filter by Location:

1. Click the **+ (plus sign)** next to the State checkbox to expand the list of states contained in your People Results data. The expanded list contains records counts for each available state.
2. If County or City data is available, plus signs are available to expand City or County data. Counts are also listed for available County and City data.
3. Click the **checkboxes** next to states, counties, and/or cities to select the detail of filtering you wish to apply to Location data.

   Note Clicking a checkbox next to a specific state, will ensure that all data specific to that state appears in your filtered results. If you want to filter more narrowly, click checkboxes next to particular Counties or Cities rather than State checkboxes.
4. If Location filters are the only filters you wish to apply to your People Results list, click **Apply Filters**. The filter(s) will be applied to update your People Results list and provide you with a narrowed set of results.

   Note You can set other filter options (e.g., year of birth, license type) before clicking Apply Filters to narrow your results even further.

Filter by Year of Birth

1. Click the checkbox next to one or more decades, or click the **+** to view and select individual birth years you wish to use in filtering your People Results. A results count is listed to the right of each decade and Year of Birth available in your People Results data.
2. Click **Apply Filters** or select additional filtering options before clicking Apply Filters. The filter(s) applied will update your People Results data to provide a narrowed set of results.

Filter by Phone Number – Email – Business/Employment – Household Information

1. Click the checkbox(es) next to Phone Number, Email, Business/Employment, and/or Household Information to filter your People Results data to results with (a) phone number/s available; (b) email address(es) available; (c) business/employment information available; and/or (d) multi-person households. Results counts are listed to the right of each filter option.
2. Click **Apply Filters** or select additional filtering options before clicking Apply Filters. The filter(s) applied will update your People Results data to provide a narrowed set of results.

Filter by License Type

1. Click the **Select** link to the right of License Type, which opens a window containing a list of License Types available within your People Results list.

   Note A Search box exists at the top of the License Type window into which you can begin typing characters to locate a particular license (the Search box is helpful when your People Results data produces a large number of license types).

2. Click the checkbox(es) next to the particular licenses by which you wish to filter your People Results data and click **Continue** to return to your Filter Options.

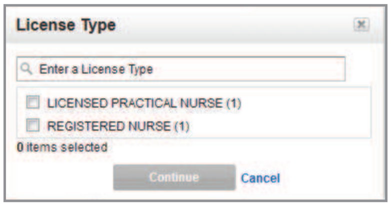


Figure 4-2. Filter by license type

3. Click **Apply Filters** or select additional filtering options before clicking Apply Filters. The filter(s) applied will update your People Results data to provide a narrowed set of results.

The Filtering feature allows you to significantly narrow your People Results data but also can be undone should you wish to return to your original People Results. To reverse your filters, click the **Undo Filters** button. The filters will be reversed and your original People Results data will be restored. You may also de-select checkboxes individually while leaving others selected and click **Apply Filters**.

SORT PEOPLE RESULTS

People Results may be sorted by using the Sort By drop-down box located above the results list. Results may be sorted by **Relevance**, **Last Name**, **Year of Birth**, **City**, and **State**. Relevance is the default sort option by which People Results are automatically sorted and brings the most pertinent results to the top of the list.

To sort your People Results list using a ranking option, other than Relevance, click the **Sort by** drop-down arrow and select the ranking option to sort your People Results. After you select a ranking option, the results list will automatically be re-sorted based upon the option selected.

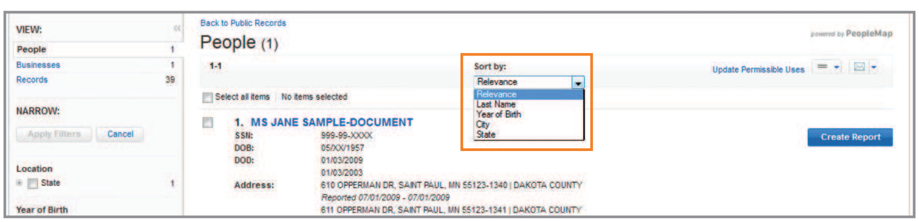


Figure 4-3. Sort People Results – default sort is by Relevance

SHOW RESULTS

Up to twenty (20) individual results, if available, will show per page. You can elect to show more individual results per page by clicking the **drop-down arrow in the per page box** to show 50 or 100 records per page. The box is located below your People Results list.

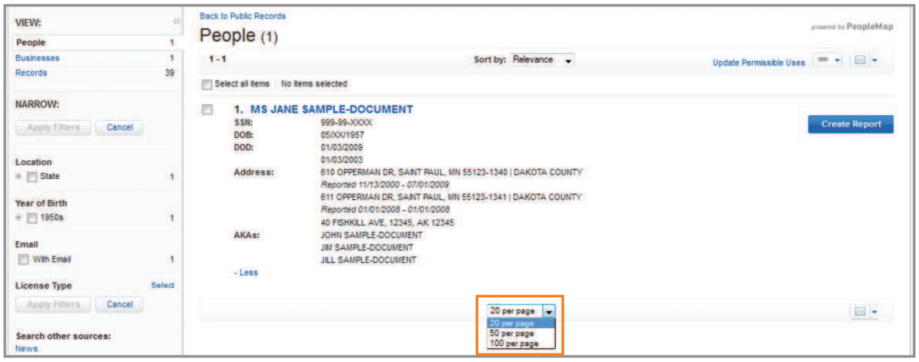


Figure 4-4. Show 20, 50 or 100 People Results per page

VIEW DETAILS

The default People Results list view shows a summary of basic information for each individual record in the list, including Social Security Number, Date of Birth, Date of Death, Address, and AKAs – this is the More Detail view. To show Less Detail in the results list, click the **Less Detail/More Detail icon** in the upper right corner of the results list and click **Less Detail**.

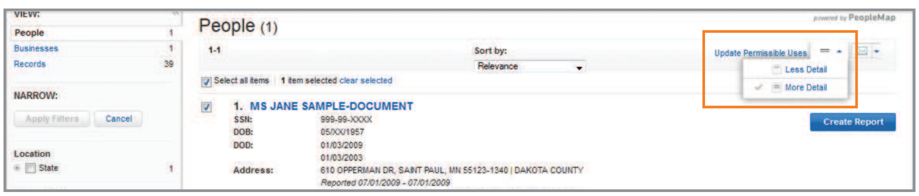


Figure 4-5. Select People Results records – Show Less or More Detail

Note Below the name of each individual in the results list is a Less link that can be used to show Less Detail for an individual record. Click **Less** to view fewer details related to a particular record.

SELECT AND DELIVER PEOPLE RESULTS

People Results can be printed, emailed or downloaded. To deliver People Results for print, email or download, select one or more records. Click a **checkbox** next to an individual record to select a record, click **multiple checkboxes** next to multiple records to select multiple records, or click the **Select All Items** box located to the left and above the People Results list to select all records contained in the list. Next, select a Deliver Option.

Click the **Delivery Options drop-down arrow** to select a delivery option: **Email**, **Print**, or **Download**. Each Delivery Option allows you to deliver the People Results records (or selected records) in a list format, or choose to deliver up to five PeopleMap Reports directly from the People Results List. After selecting a Delivery Option, an option window will display with options to deliver records or reports and set Layouts & Limits.

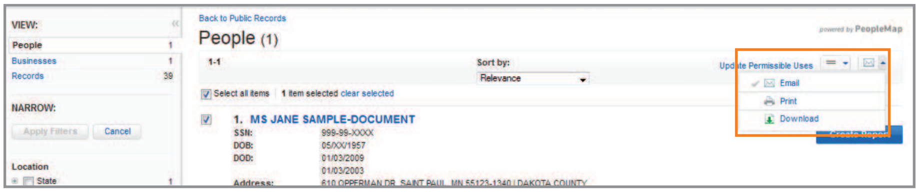


Figure 4-6. Select a Delivery Option

- The Email PeopleMap Report/Record window includes two tabs: Recipients & Layout and Limits.
    - Recipients: Your email address will auto-fill into the To box; additional email addresses can be entered to which you can send records or reports. The Subject box is auto-filled but can be changed. Enter optional notes into the Email Note box. Select Person Record(s) or PeopleMap Report(s) by clicking the appropriate radio button. Choose the format – Microsoft Word, RTF, PDF or WordPerfect – in which you wish to email the selected records or reports by clicking the down arrow in the Format box.
    - Layout and Limits: To select the font color for links, click the drop-down arrow in the Links box. Choose a Font Size by clicking the drop-down arrow in the Font Size box. Click the Underline box to ensure that links will be underlined. To include an Expanded Margin for Notes or a Cover Page, check the appropriate box.

  After entering all information and setting layouts & limits, click the **Email** button to deliver your records or reports via email. Click **Cancel** to exit the Email PeopleMap Report/Record window.

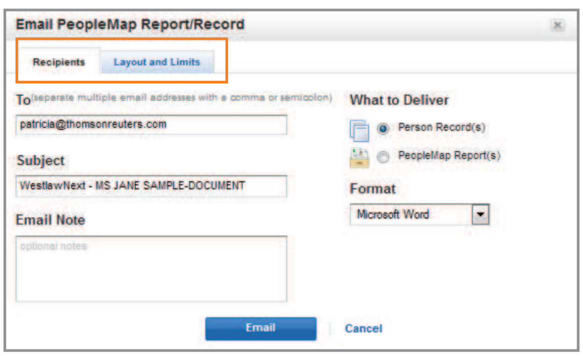


Figure 4-7. Email PeopleMap Report/Record(s)

- The Print PeopleMap Report/Record window includes two tabs: The Basics & Layouts and Limits.
    - The Basics: Select Person Record(s) or PeopleMap Report(s) by clicking the appropriate radio button.
    - Layout and Limits: Set Layouts and Limits as described above.

  After selecting records or reports and setting layouts & limits, click the **Print** button to print the selected records or reports. Click **Cancel** to exit the Print PeopleMap Report/Record window.

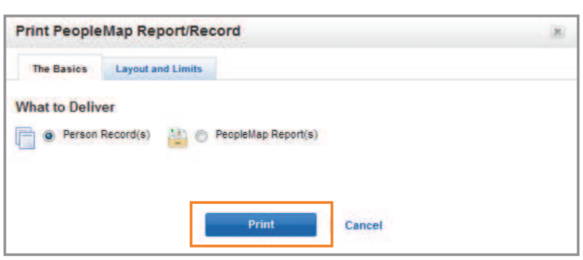


Figure 4-8. Print PeopleMap Report/Record(s)

- The Download PeopleMap Report/Record window includes two tabs: The Basics and Layout and Limits.
    - **The Basics:** Select Person Record(s) or PeopleMap Report(s) by clicking the appropriate radio button. Select a format - Microsoft Word, PDF, RTF, or WordPerfect – by clicking the Format box drop-down arrow.
    - **Layout and Limits:** Set Layouts and Limits as described above.

After selecting records or reports and setting layouts & limits, click the **Download** button to download records or reports. Click **Cancel** to exit the Download PeopleMap Report/Record window.

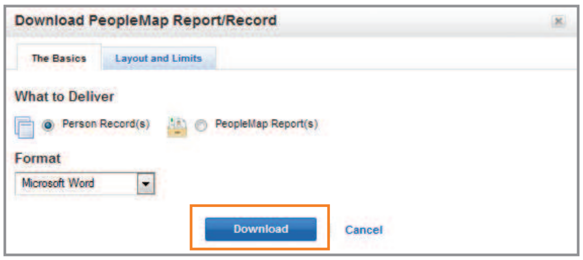


Figure 4-9. Download PeopleMap Report/Record(s)

UPDATE PERMISSIBLE USES

The Update Permissible Uses allows you to return to the Permissible Uses window to modify your permissible uses. See Section 3 "Permissible Use" on page 7 for information and instructions regarding Permissible Uses.

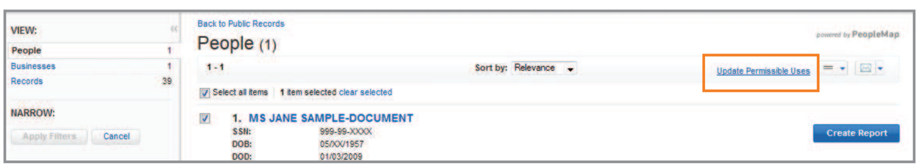


Figure 4-10. Update Permissible Uses link

ACCESS PERSON RECORD

To dive deeper into an individual people record, click a person's name in the People Results list to navigate to the person record. The full person record contains additional data and features that may be viewed and/or added to a PeopleMap report. Tools include Graphical Display, Address Map, Web Analytics, and Report.

CREATE REPORT

Each individual People record in the People Results list includes a Create Report button to the right of the record summary. Click **Create Report** to create an online PeopleMap Report for the subject of interest. It is often beneficial to first click the person name and add additional relevant information to the report including web analytics results, map and graphical displays.

See below for further information regarding full person records and features "Section 7, PeopleMap Reports" on page 36.

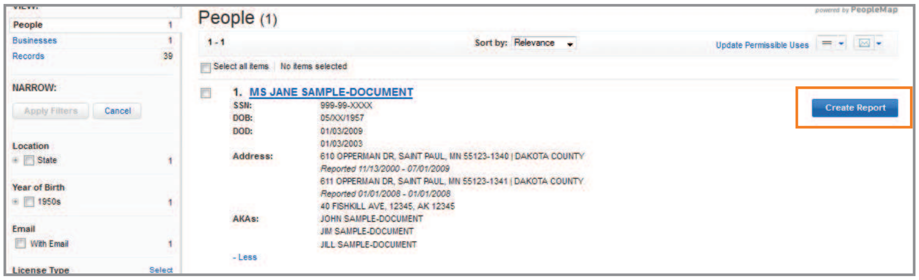


Figure 4-11. Click Person Name to access full record / Click Create Report for an online PeopleMap Report

People Results – Person Record

Once you have identified the subject of interest, click the person's name to view a more comprehensive Person Record. You can also immediately create a report by clicking **Create Report**.

A Person Record is a more robust view of the data seen on the People Results list, which aggregates and de-duplicates subject information from 20+ high-quality content sources. The comprehensive Person Record is the launching point for deeper research on a subject through dynamic Graphical Displays that show connections, Address (Google) Maps, Web Analytics, and PeopleMap Reports. These features are available via tabs along the top of the Person Record. The address list is ordered in reverse chronological order by reported dates and lists the contributing sources of the address.

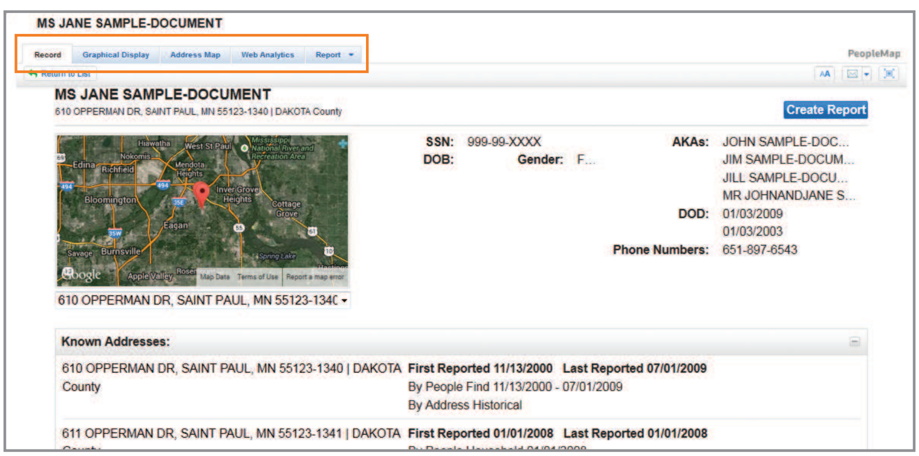


Figure 4-12. Full Person Record with access to Graphical Display, Address Map, Web Analytics, and Reports

Note After clicking into a Person Record, you can click **Return to List** to go back to the People Results List.

The Person Records page includes certain tools and features by which you can manipulate the record data and more deeply analyze the available data.

PERSON RECORD TOOLS

Display Options

This tool allows you to modify the appearance of text as displayed for your Person Record, including size, font type, and margin width. Click **Display Options**, modify text size, font type, and margin width, view the modifications via the Preview box, and click **Save**, or click **Cancel** to exit Display Options.

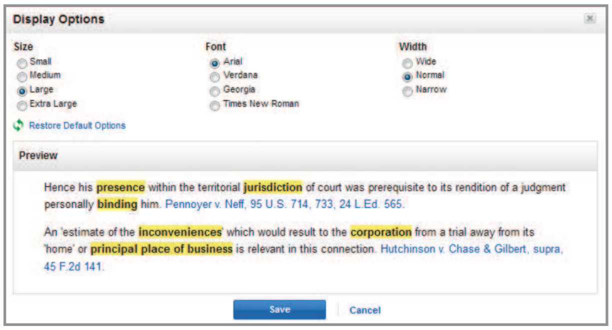


Figure 4-13. Person Record – Display Options

Note If you previously modified Display Options and wish to restore Default Options, click the **Restore Default Options** link within the Display Options window.

Delivery Options

Person Records can be printed, or, emailed or downloaded in available formats, including Word, PDF, RTF, or WordPerfect. The print, email and download tools operate in the same manner as they operate for delivering the People Results List. See "Delivery Options" on page 35 for more detailed information.

Fullscreen Mode

This tool allows you to view the person record in full screen mode on your computer. Click the **Fullscreen Mode** button to view your results on your full computer screen.

Figure 4-14. Person Record – Fullscreen Mode button

Create Report

Click the **Create Report** button to create a report containing the comprehensive person record data. See "Section 7, PeopleMap Reports" on page 36 for specific Person Record Report details.

Graphical Display

Two graphical displays are available to help you analyze public records associated with the subject and the subject's connections to possible adverse information, assets, business and employment information, and connections to other people and related parties. Click the **Graphical Display** tab to access the tool.

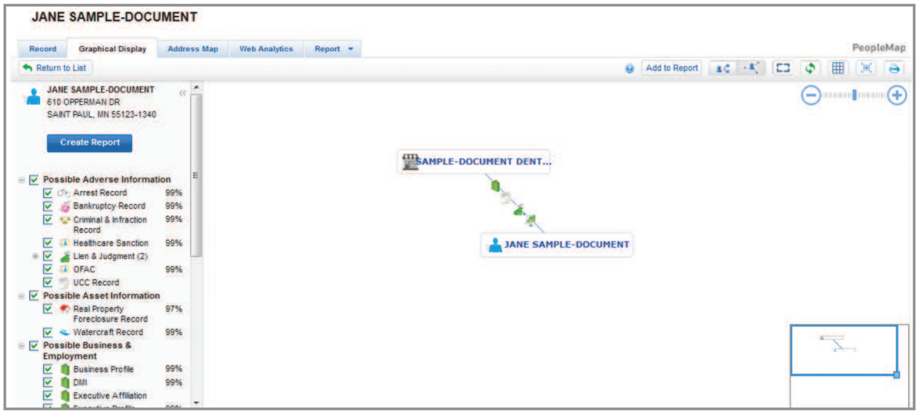


Figure 4-15. Person Record – Graphical Display tab / Entity-to-Entity Display (Default Display)

Note Browser plugins are NOT required to use the interactive graphical displays.

ENTITY-TO-ENTITY GRAPHICAL DISPLAY (DEFAULT VIEW)

This feature allows you to visually research people and their connections to possible adverse information, assets, business, and employment information, and connections to other people and related parties. This default view is accessed by clicking the **Graphical Display** tab in your Person Record (Figure 31).

The subject name is listed at the top left together with the Create Report button and filters for Possible Adverse Information, Possible Asset Information, Possible Business & Employment, Possible People Information, and Related Parties. The percentages listed next to the records in the filter list indicate the likelihood that the information is related to your subject.

- The checkboxes next to the available record categories allow you to filter certain records. Some filters are not selected (displayed) by default, including Relatives, Shared Phone Number, and Duplicate Social Security Number. To include or exclude certain records and related parties, click the **checkbox(es)** next to the records you wish to exclude or click the **category name** to exclude an entire category (e.g., Docket) – you either add a checkmark to include records or remove a checkmark to exclude records.

  Note Where some but not all records in a category are selected, you will see a square instead of a check in the checkbox.

  Note The graphics displayed to the right are dynamic and are modified based upon categories/records included or excluded.

- The plus signs next to the available record categories allow you to expand record details to further narrow information you wish to research and/or exclude/include.
- All categories are enabled by default with checkboxes – click the box next to a category to exclude certain information.

- The right side of the Entity-to-Entity Graphical Display also lists the subject name but uses graphics to visually display relationships between the subject and the records/record categories set forth in the left column (Possible Adverse Information, Possible Asset Information, Possible Business & Employment, Possible People Information, and Related Parties).
- If you float your cursor over a record, a window opens showing the full record title. If you click on a record icon located along the line connecting the subject and related information, a window opens showing further record detail. Click again to view the full-text
- Continue to research graphically by expanding out a related person or business which will pivot the display to that second entity. You may continue to expand out the connections which may expose additional connections between entities. Click **Search** on a business entity to run a Company Investigator search to pull a full company report and available company family trees.

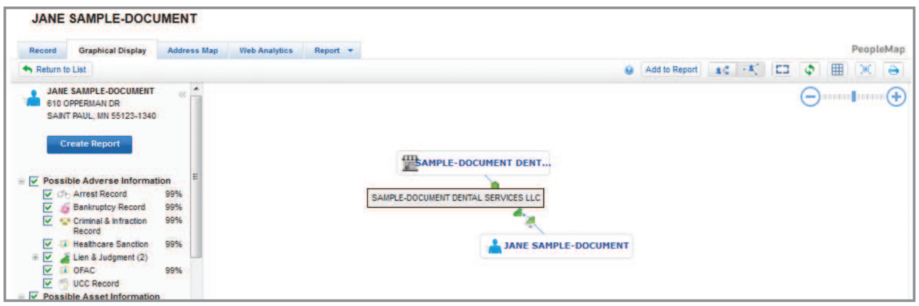


Figure 4-16. Entity-to-Entity Display – View Record Title

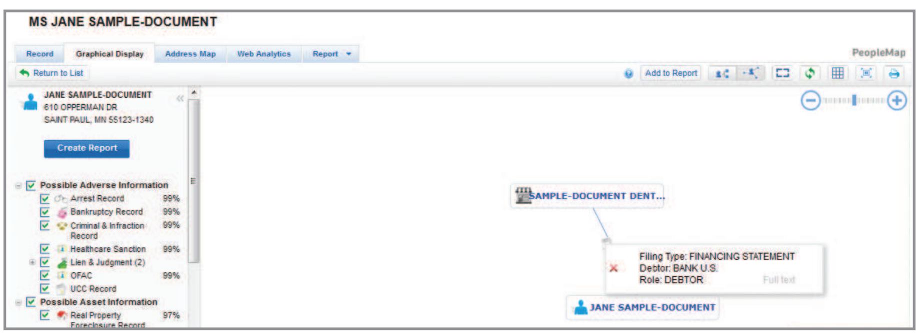


Figure 4-17. Entity-to-Entity Display – View Record Related Records

ENTITY-TO-DOCUMENT GRAPHICAL DISPLAY

To access the Entity-to-Document Graphical Display, click the **Entity-to-Document Display** button on the Graphical Display toolbar.

Note The Entity-to-Entity Graphical Display button is located immediately to the right of the Entity-to-Document Graphical Display button; you can easily toggle between the Entity-to-Entity Graphical Display and Entity-to-Document display by clicking on either button. When accessing the graphical display for subsequent subjects, you will be presented with the graphical display format that you last used.

Figure 4-18. Entity-to-Document Display

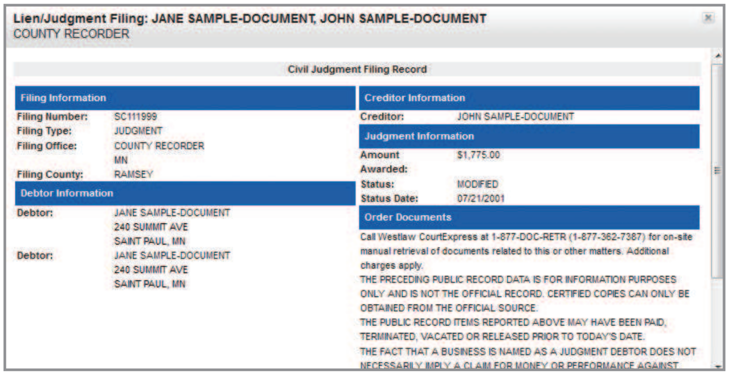
After clicking the Entity-to-Document Graphical Display button, the visual focuses on public records associated with the subject. This dynamic display is useful for visualizing a person's public records footprint, an easy-to-view display highlighting Possible Adverse, Asset, Business & Employment, People Information, and Related businesses and Parties. The user may also expand out additional people and businesses in a linear display.

- Floating your cursor over a record in the Entity-to-Document Display highlights the lines that demonstrate the relationship(s) between the subject and record, as well as Related Parties, if any.

Figure 4-19. Float cursor over Record to highlight relationships between Subject, Record & Related Parties, if any

- Clicking on a record opens a small window that display basic information related to the record. The window also includes a red Delete "x" and a Full Text link. Click on the **red Delete "x"** to close the window. Click on the **Full Text** link to view the full text of the record.

Figure 4-20. Click a Record to display basic information and access Full Text link



Lien/Judgment Filing: JANE SAMPLE-DOCUMENT, JOHN SAMPLE-DOCUMENT
COUNTY RECORDER

Civil Judgment Filing Record

Filing Information

Filing Number:	SC111999
Filing Type:	JUDGMENT
Filing Office:	COUNTY RECORDER MN
Filing County:	RAMSEY

Debtor Information

Debtor:	JANE SAMPLE-DOCUMENT 240 SUMMIT AVE SAINT PAUL, MN
Debtor:	JANE SAMPLE-DOCUMENT 240 SUMMIT AVE SAINT PAUL, MN

Creditor Information

Creditor:	JOHN SAMPLE-DOCUMENT

Judgment Information

Amount Awarded:	$1,775.00
Status:	MODIFIED
Status Date:	07/21/2001

Order Documents

Call Westlaw CourtExpress at 1-877-DOC-RETR (1-877-362-7387) for on-site manual retrieval of documents related to this or other matters. Additional charges apply.
THE PRECEDING PUBLIC RECORD DATA IS FOR INFORMATION PURPOSES ONLY AND IS NOT THE OFFICIAL RECORD. CERTIFIED COPIES CAN ONLY BE OBTAINED FROM THE OFFICIAL SOURCE.
THE PUBLIC RECORD ITEMS REPORTED ABOVE MAY HAVE BEEN PAID, TERMINATED, VACATED OR RELEASED PRIOR TO TODAY'S DATE.
THE FACT THAT A BUSINESS IS NAMED AS A JUDGMENT DEBTOR DOES NOT NECESSARILY IMPLY A CLAIM FOR MONEY OR PERFORMANCE AGAINST

Figure 4-21. Full text of Record after clicking on Full Text link

GRAPHICAL DISPLAY TOOLBAR/TOOLS

The Graphical Display tab contains a toolbar allowing you to toggle easily between the Entity-to-Entity and Entity-to-Document Graphical Displays. Other features include: Help, Add to Report, Center, Redraw, Grid, Fullscreen Mode, and Print. A tool allowing you to change the size of the Graphical Display exists directly below the Graphical Display toolbar. Additional tools available include Return to List and Create Report buttons and a Graphical Display Navigation tool.

Of particular interest is the ability to use Add to Report to insert important visuals and connections between entities directly into the PeopleMap Report Attachments section.

The Graphical Display toolbar features are as follows:

Add to Report — Click **Add to Report** to take a snapshot of the graphical display and add it to the PeopleMap report. These visuals often make a good cover page for a report, which can be dragged from the Attachments section in the online report.

Click **Entity-to-Document** to view the Entity-to-Document Graphical Display.

Click **Entity-to-Entity** to view the Entity-to-Entity Graphical Display.

Click **Center** to center the graphical display in the display window.

Click **Redraw** to redraw the connections.

Click **Grid** to add a grid to your graphical display.

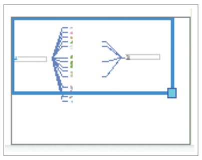
Click **Fullscreen Mode** to view the graphical display in fullscreen mode.

Click **Print** to print the graph. Large graphical displays are formatted for multi-page printing.

Click the **minus** or **plus sign** to decrease or increase the size of your graph.

Return to List — Click **Return to List** to return to your People Results List.

Create Report — Click **Create Report** to create a PeopleMap Report of the selected subject (see "Section 7, PeopleMap Reports" on page 36 for further details).



The lower right corner of the Graphical Display contains a Navigation tool box that can be used to quickly and easily move around your display. It contains a smaller, blue-outlined box. The portion of the larger Graphical Display that appears within the smaller blue box is the portion of the Graphical Display that you are currently viewing. You can navigate to other portions of the larger Graphical Display by floating your cursor over the box in the lower right corner, which will display a Navigation icon. Click on the **Navigation icon**, hold your mouse button down and move your mouse to move the small blue box into position on the Graphical Display that you wish to view via the larger Graphical Display viewer.

Address Map

Click on **Address Map** to display all addresses linked to a subject in reverse chronological order, together with a map pinpointing the addresses. Map images are provided by Google Maps and are as current as images available by searching directly with Google Maps.

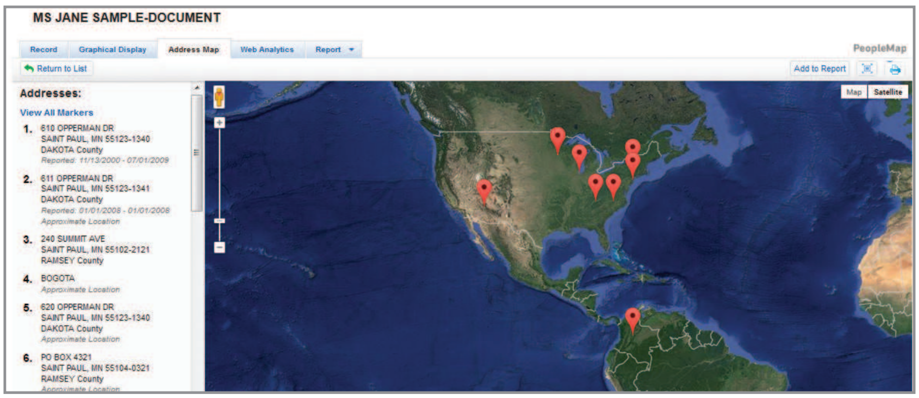


Figure 4-22. Address Map

A scroll bar to the right of the addresses list allows you to easily view the addresses linked to the subject – review a person's locations over time and pinpoint specific addresses. Floating your cursor over an address in the list will cause its pushpin to jump to quickly. Clicking an address in the list or a **pushpin** on the map will open an address window from which you can zoom in on the selected address by clicking **Zoom Here**.

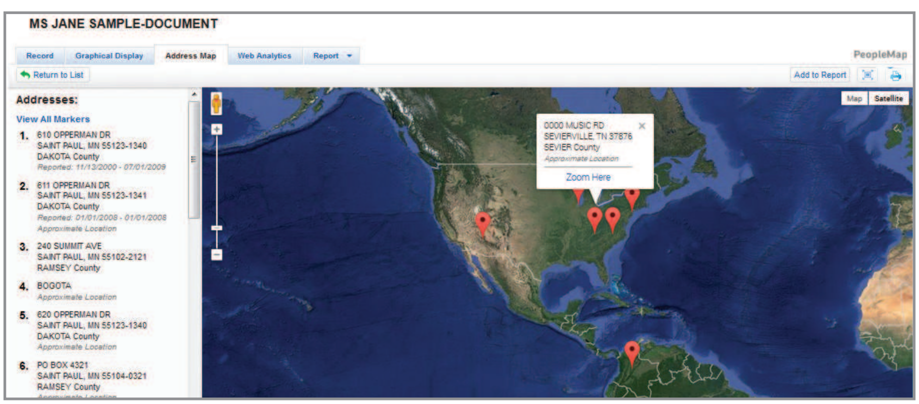


Figure 4-23. Click an address or map pushpin and Zoom Here

After clicking Zoom Here, the map will zoom to the selected address. Additional navigation and views can be manipulated via the +/- zoom options, map/satellite toggle, and rotate map features. Drag the person icon into the map location to switch the view to a Street View.

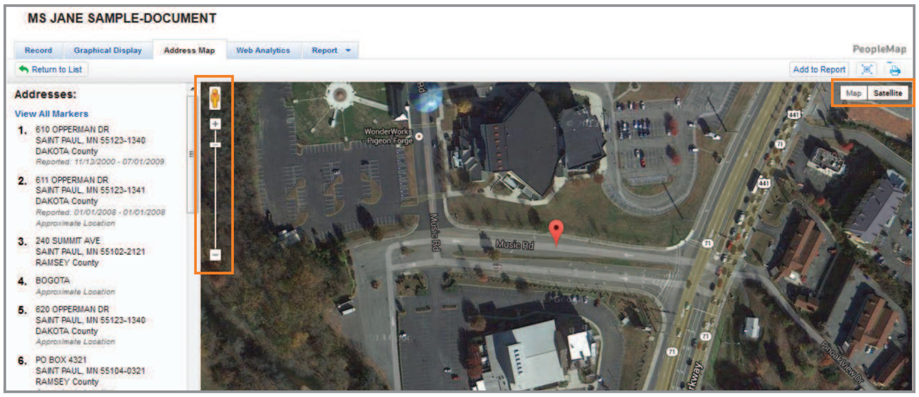


Figure 4-24. Zoomed address map with additional navigation options

ADDRESS MAP TOOLBAR/TOOLS

Additional Address Map tools include the following:

- **Return to List** re-directs you to the initial Public Records Results List from the Person Record you are viewing.
- **Add to Report** allows you to add a snapshot of the map into the PeopleMap Report for the subject. Click **Add to Report** to save the map snapshot; a message will confirm the map has been successfully added to your report. The map snapshot will be added into the Attachment section of the PeopleMap report by default. Up to 100 maps may be added to a single report.
- **Fullscreen Mode** allows you view a full screen version of the map.
- **Print** opens a window displaying a print preview of the map. Click **Print** or **Cancel**.

Web Analytics

This feature allows you to research a person's social media footprint and web results through categorized and filterable deep web search results. Web Analytics offers filtering options of web results and allows you to link out to Social Media and Web pages possibly associated with the subject. Click the **Web Analytics tab** within the PeopleMap workflow to get started.

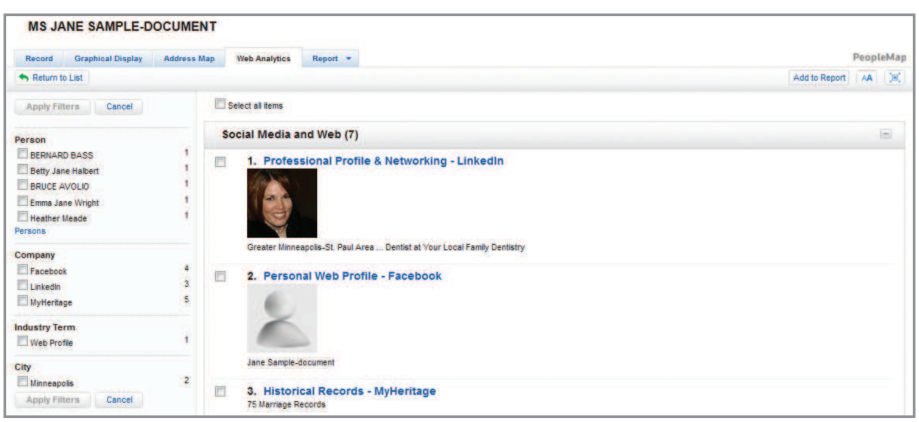


Figure 4-25. Web Analytics within Person Record

Filtering Options – An improvement over most web search offerings, Web Analytics Results can be filtered to narrow your research data. Filtering options appear on the left side of the Web Analytics tab and vary based upon your subject's available data but may include Person, Company, Industry Term, City, Phone Numbers, Organization, and risk flags among others. Checkmark a box or boxes next to the records you wish to utilize to narrow your search by clicking them and then click Apply Filters. Click Cancel to reverse the filtering. If your filter options are set to automatically filter when selecting each checkbox, that will be honored here as well.

Social Media & Web Results – All available social media and web data appears on the right side of the Web Analytics tab. Clicking a particular result navigates directly to the website associated with the result, which opens in a new browser window and pauses your WestlawNext session. This is often a great source to check for photos and other information not found in other public records sources.

Note If a person has marked their Social media profiles such as LinkedIn and Facebook as private in those website settings, it is not accessible through Web Analytics.

WEB ANALYTICS TOOLBAR/TOOLS

Additional Web Analytics tools include the following:

- Return to List re-directs you to the initial Public Records Results List from the Person Record you are viewing.
- Add to Report allows you to add some or all of the Social Media & Web Results to the subject PeopleMap Report. Select one or more of the Social Media & Web Results by checking boxes next to individual results or Select All and click Add to Report to add the results into the PeopleMap report. The result list items added to the report are then available in the PeopleMap Report Attachments section when you open it. This feature is often used to bring photos into a report.
- Display Options allows you to modify the appearance of text as displayed for your Social Media & Web records, including size, font type, and margin width. Click Display Options, modify text size, font type, and margin width, view the modifications via the Preview box, and click Save, or click Cancel to exit Display Options.

  Note If you have previously modified Display Options and wish to Restore Default Options, click the Restore Default Options link within the Display Options window.

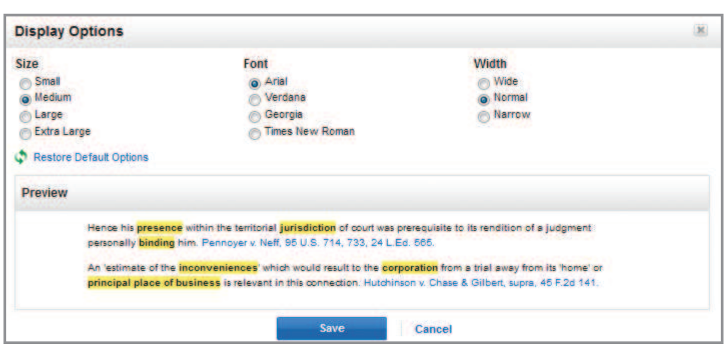


Figure 4-26. Web Analytics Display Options Tool

- Fullscreen Mode allows you to view a full screen version of the Web Analytics Results tab.

Report

The Person Record tabs include a Report tab that can be used to view a Report Overview or create a Premier or Basic Report. See "Section 7, PeopleMap Reports" on page 36 for further details.

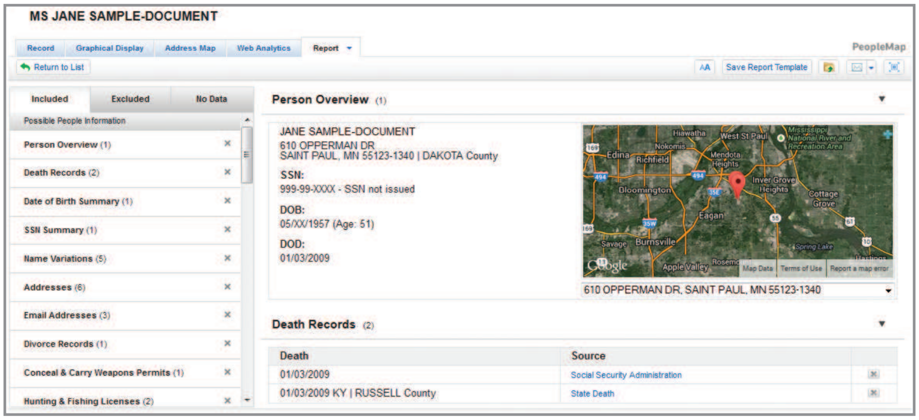


Figure 4-27. Online Person Record Report

5 PeopleMap Reports

Overview

PeopleMap reports quickly pull all of the relevant data together about a subject in a customizable, online report. An online Report Overview is available by clicking on a **Create Report** button. **Premier** and **Basic Reports** options are available; either can be set as your default report option.

Premier Reports contain all available current and historical information about a person, including assets, adverse information, business and employment relationships and licenses, along with the underlying full-text records. Also included are additional report sections for potential household associations, relatives and neighbors.

Basic Reports contain information about a person, including basic summaries of assets, adverse information, business and employment relationships and licenses, along with the underlying full-text records.

Note The first time you create a report, you will navigate to the Report Overview page where you can select a report type – **Premier** or **Basic** – by clicking the appropriate **Create Report** button; your selection will become your default report type until changed by going to the Report Overview page and selecting a different report type.

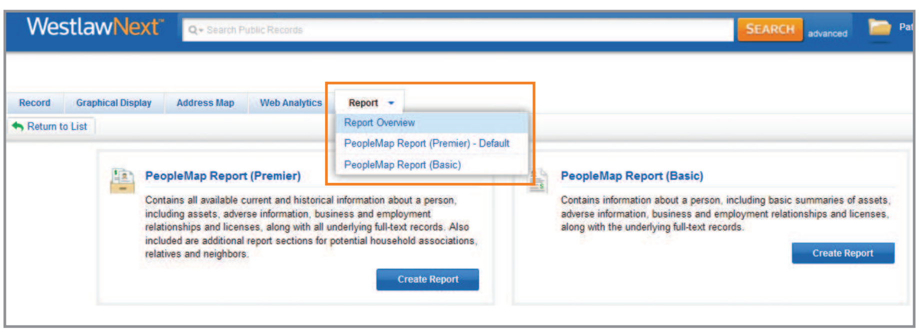


Figure 7-1. PeopleMap report options – Premier or Basic

Online reports are categorized into the following report sections with sub-sections of content within:

- **Possible People Information** – Includes Person Overview, Drivers Licenses, Death Records, Date of Birth Summary, SSN Summary, Name Variations, Addresses, Email Addresses, Marriage Records, Divorce Records, Conceal & Carry Weapons Permits, Hunting & Fishing Licenses, Utility Records, Phone Numbers, Voter Registration, and Political Donors
- **Possible Asset Information** – Includes Real Property Tax Records, Real Property Transactions, Real Property Foreclosure Records, Watercraft Records, Aircraft Records, Vehicle Registrations, and Unclaimed Assets
- **Possible Adverse Information** – Includes Risk Flags Analysis, Criminal & Infraction Records, Arrest Records, OFAC, Healthcare Sanctions, Liens& Judgments, Bankruptcy Records, and UCC Records, Lawsuit Records, Dockets
- **Possible Business & Employment** – Includes Professional Licenses, Executive Profile, Executive Affiliations, Work Affiliations, DMI, FEIN, Stock, Business Profile, Healthcare Licenses, National Provider Identities, Executive Bios, Corporate Records & Business Registrations, Busfind US, Busfind Canada, Fictitious Business Names/DBA, and Worldbase

- Full-Text Documents
- Possible Relatives & Household Members – Includes Household Records, Relatives Analysis, and Other Address Associations
- Possible Neighbors
- Attachments
- Possible Named Parties
- No Documents Found
- Permissible Uses

Creating a Report

Reports may be created directly from your initial Results List or after you have linked in to a comprehensive Person Record.

CREATE REPORT FROM INITIAL RESULTS LIST

To create a subject report directly from your initial Results List, locate the subject for which you wish to create a report and click **Create Report**. Create reports here if you want to bypass other features and do not have a need for web analytics, graphical displays or map attachments. These additional features are accessed by clicking the person name to go to the Person Record.

You may also select up to five subjects on the result list and create all of the reports simultaneously by using the delivery options.

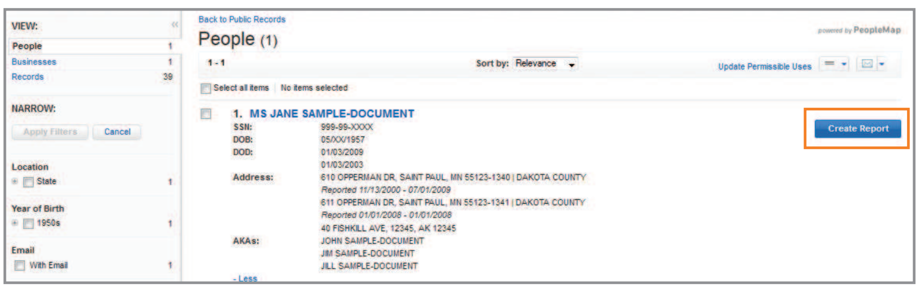


Figure 7-2. Create report from initial results list

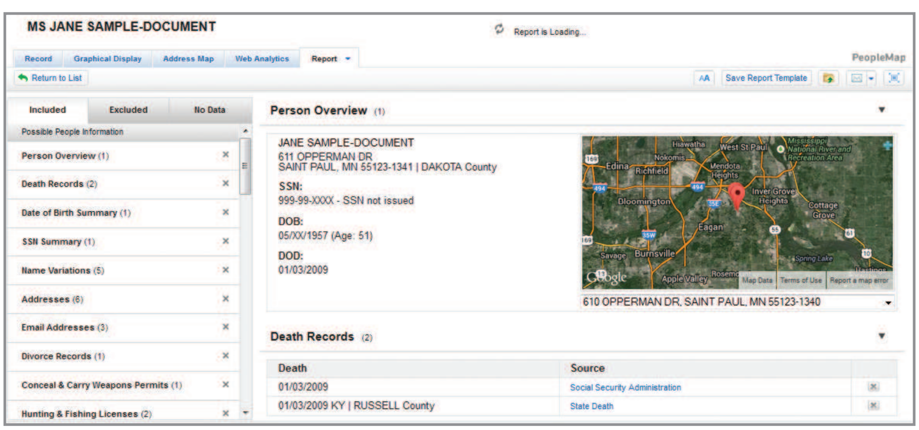


Figure 7-3. Online PeopleMap report

ADDITIONAL ACCESS POINTS TO CREATE REPORTS

The Create Report tool is also available after you link in to a Person Record. After linking into a Person Record, you can create a report from the **Report**, **Graphical Display**, and **Report** tabs available in a Person Record.

PEOPLEMAP REPORT OVERVIEW

After creating an online PeopleMap Report, you will see three tabs in the left column of your screen – **Included**, **Excluded**, and **No Data** – each of which lists Content Categories and Records, and a PeopleMap Report summary on the right. The **Included tab** lists Sections & Sub-sections of subject records and data included in the report. The **Excluded tab** lists records and data you excluded from the report. The **No Data** tab lists categories of unavailable records and data (Figure 65).

To quickly navigate to and view a particular Section or Sub-section of the PeopleMap Report, click a Section or Sub-section listed in the left column and the right side view will automatically navigate to the Section or Sub-section upon which you clicked. You may also quickly scroll through the list of Sections and Sub-sections by using the left column scroll bar (e.g., to determine categories you may want to exclude) or use the scroll bar on the right side to navigate the entire report.

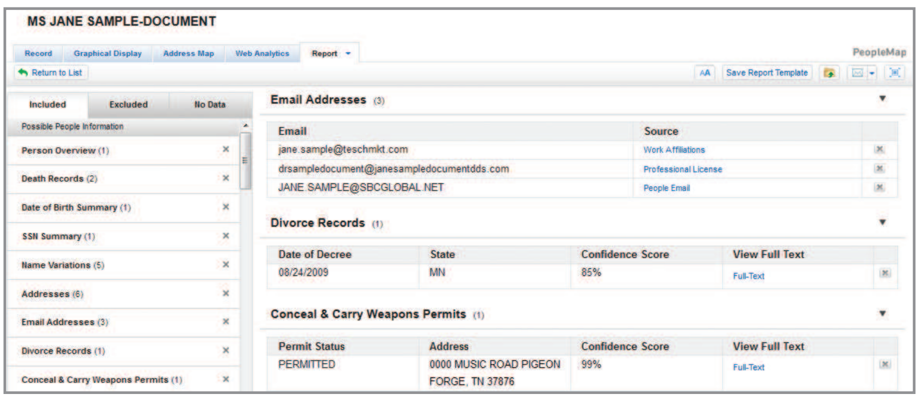


Figure 7-4. Quick view Email Addresses by clicking Email Addresses in left column

Records existing in the online PeopleMap Report contain links to full-text Source information for additional context on the information in the report summary. Full-text Source information provides all record details, including the source and often date information. Click any full-text Source link to open a window containing the full-text Record details inline with the report.

Figure 7-5. Click Full-Text link to view full text of an individual record

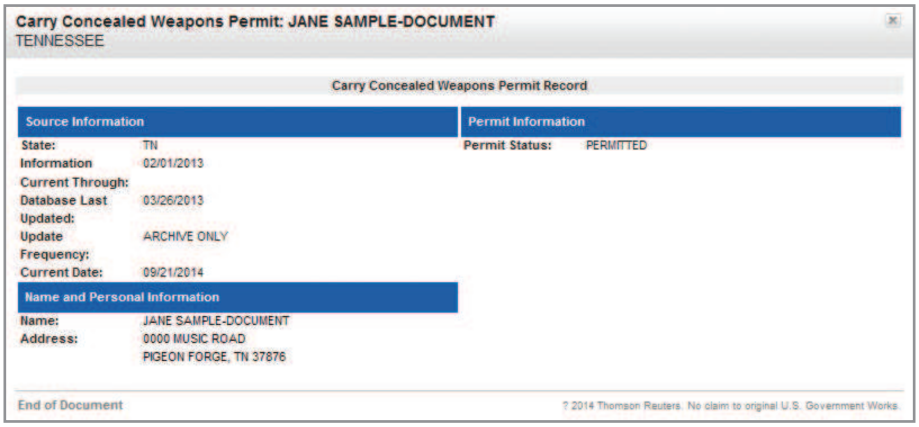


Figure 7-6. Full-Text record

Note The Attachments section contains all of the information you have added to the report, including any graphical displays, address maps, and web analytics results.

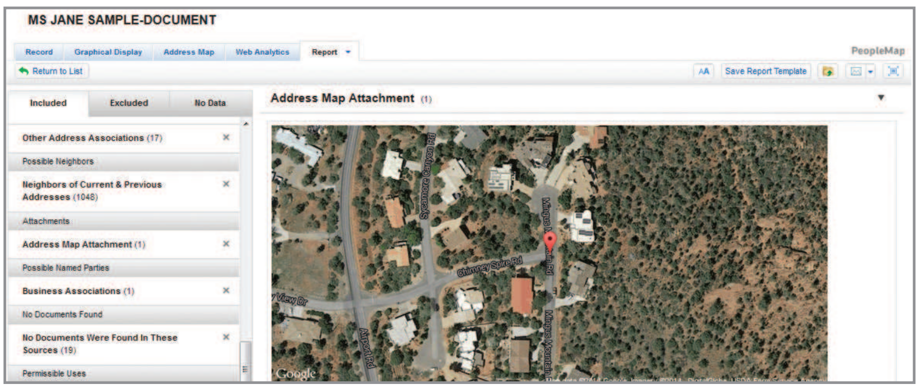
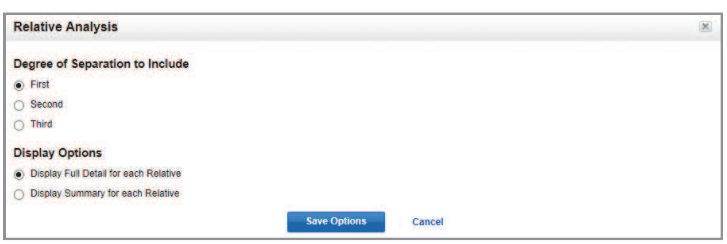


Figure 7-7. Map attached to PeopleMap Report

DEGREES OF SEPARATION AND OTHER ADDRESS ASSOCIATIONS

First degree of separation identifies others with a last name and address match to the subject. Second and third degrees cast incrementally wider nets, increasing the chances of finding relatives with greater tolerance for false positive results.



Need high-rez image

Figure 7-8. Degrees of Separation window

Other Address Associations finds people at the subject's addresses that do not share the same last name.

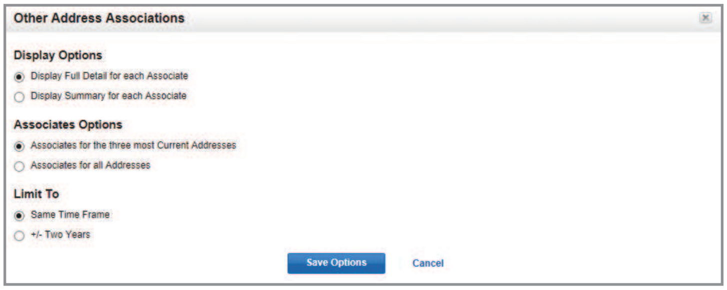


Figure 7-9. Other Address Associations window

Neighbors of Current & Previous Addresses runs a radius search on the subject's addresses to find others who reside or have resided in close proximity to the subject.

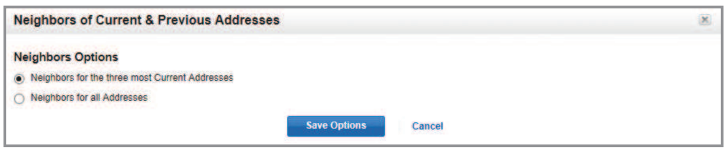


Figure 7-10. Neighbors of Current & Previous Addresses window

CUSTOMIZING PEOPLEMAP REPORTS

PeopleMap Reports may be customized so that you can place information you need most at the top of a report and/or exclude information not needed in a report.

Included Sections and Sub-sections may be dragged and dropped to customize the view of the online PeopleMap Report. To customize the view by moving Sections and Sub-sections, click on a Section or Sub-section and hold your mouse button while moving your mouse to drag and drop a Section or Sub-section. Included Sub-sections may be excluded from the PeopleMap Report by clicking the "x" in the right corner of a Sub-section.

All records and data (Sub-sections) that you exclude from the PeopleMap Report are listed under the Excluded tab but can be restored by clicking the **plus (+) sign** to the right of the Excluded Sub-section.

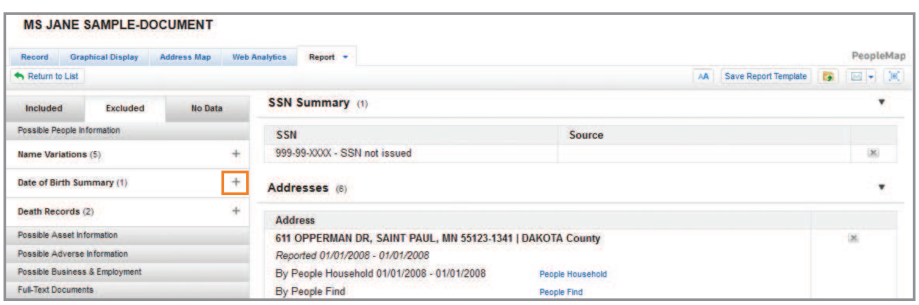


Figure 7-11. Click + to restore excluded sub-sections into the PeopleMap report

If you only want to remove a specific piece of information you may do that using the Delete x's on the right-hand side of the page. Whereas the left column include/exclude removes or adds entire sections, this feature allows precision removal of unwanted data.

You may also navigate down to the full-text section of the Report and Remove full-text records from the report. Removing a full-text record will also remove all Source references to it in the Summary sections.

Save Report Template allows you to save the customized version of your own report template to use with other subjects in the future. Click Save Report Template to open a window in which you will name the template and add an optional template description. After naming the template and adding an optional description click Save Template. A message will appear to confirm that the template was saved.

Figure 7-12. Save Report Template button

Custom report templates save you time by retaining the section and subsection formatting changes you have made for all subsequent report subjects.

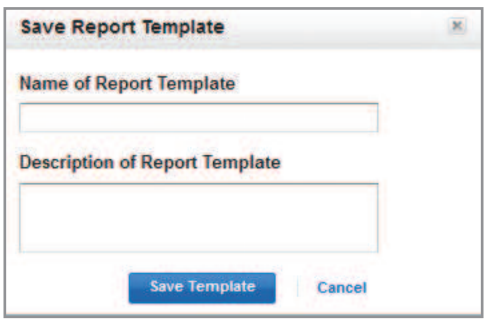


Figure 7-13. Save Report Template window

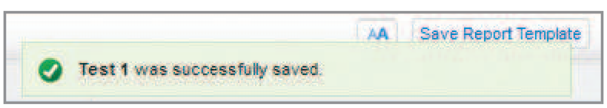


Figure 7-14. Template successfully saved

Report Templates are available for selection alongside the Premier and Basic report types on the Report Overview page and in the Report drop-down menu.

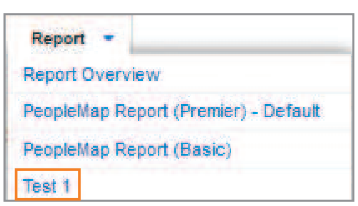


Figure 7-15. Report template available in report drop-down menu

To make a customized report your Default report, go to the Report Overview and click the Create Report button for the customized report.

To delete a custom report, go to the Report Overview page and click Delete on the report you want to remove.

REPORTS TOOLBAR/TOOLS

Available tools include the following:

- **Return to List** returns to the initial Public Records Results List.
- **Display Options** allows you to modify the appearance of text as displayed for your Report, including size, font type, and margin width. Click **Display Options**, modify text size, font type, and margin width, view the modifications via the Preview box, and click **Save**, or click **Cancel** to exit Display Options.

  Note If you have previously modified Display Options and wish to Restore Default Options, click the **Restore Default Options** link within the Display Options window.

- **Save to Folder** allows you to save PeopleMap Reports to folders within WestlawNext. Click **Save to Folder** to open a window displaying your WestlawNext folders, select an existing folder by clicking on it and click **Save**, or click **New Folder** to create a new WestlawNext folder (you will need to name it and select a location for it and click **OK** before you can save your PeopleMap Report in it), create a new folder, select the new folder by clicking it and click **Save** to save your PeopleMap Report to the new folder. Reports may be shared with others that have the same or greater access rights to Public Records in WestlawNext as the person who foldered the record. A person who is not authorized to access the foldered public records information will be blocked from viewing the records.

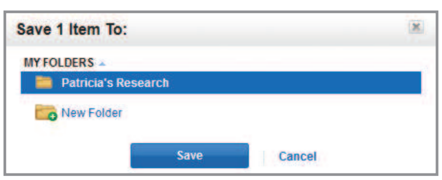
  

  Figure 7-16. Save PeopleMap report to WestlawNext Folder

  Note When saving a PeopleMap Report it is a "point-in-time" report – in other words, data saved at a particular point-in-time.

  Note Selecting a results category is not required and it will go to People by default in the main Public Reports template and People Information template. All other more granular templates default to the Content Category of the template in the Reports workflow. Easily toggle to the other categories. By selecting a results category, the preference selected will apply the next time you search with that particular template until you change the results category setting.

- **Delivery Options** allows you to email, print, and download reports or send them to Amazon Kindle. See "Delivery Options" on page 35 for specific instructions and information related to Delivery Options.
- **Fullscreen Mode** allows you to view a full screen version of the Report Overview.

WestlawNext Research History

The WestlawNext History feature keeps track of all research performed by the user, including PeopleMap research. PeopleMap research appears in a WestlawNext User's History and is available at no additional charge until 2:00 a.m. the following day.

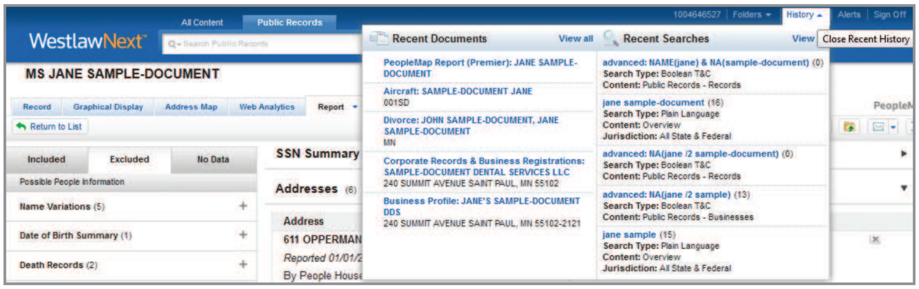


Figure 7-17. PeopleMap research available in WestlawNext History

To view your History list, simply select **View all** and the History Searches screen will appear. From here, you can see the date and time of each search as well as the Client ID for your search. You also have the ability to access your Folders from this screen.

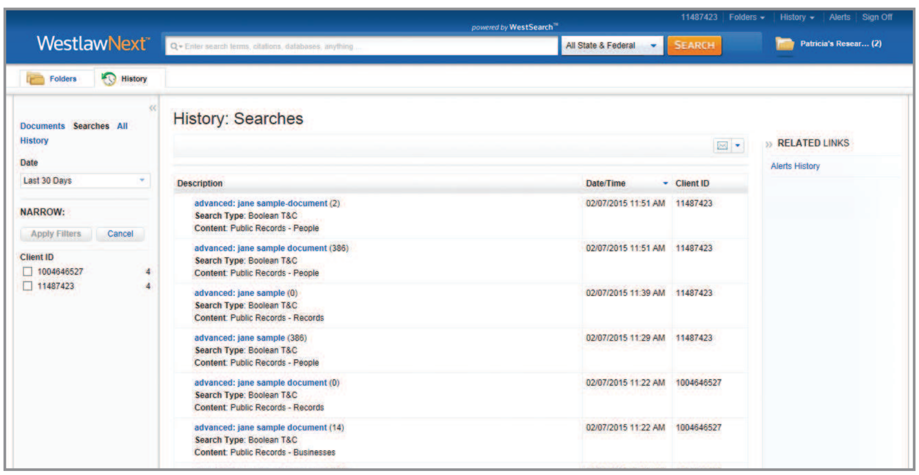


Figure 7-18. History Searches screen

6 Records

Overview

The Records workflow is a full-text search of all available billions of public records. The records workflow is a complete replacement of WestlawClassic database signon searching. The records workflow completely supports WestlawClassic queries.

Records Results

Content is alphabetized and relevancy ranked. An improvement over legacy systems, users can now view all related information pertaining to their search instead of being constrained by a single database of information.

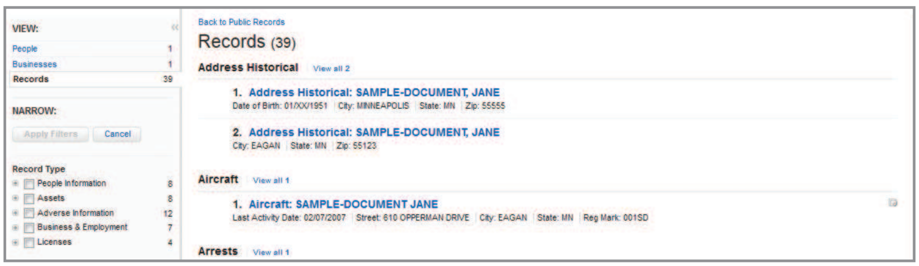


Figure 6-1. View Records search results

FILTER (NARROW) RECORDS RESULTS

The Records Results page includes tools by which you can filter (narrow) the results and access full-text records. Filtering allows you to efficiently narrow your results and locate the correct record(s). Filtering options include:

- People Information
- Assets
- Adverse Information
- Business & Employment
- Licenses

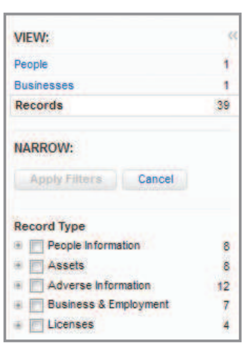


Figure 6-2. Records Results Filtering Options

When the user clicks into a specific content set filter, more granular filter options pertaining to the content are displayed.

Filter by People Information

Records Results can be narrowed by all People Information or by specific People Information records.

1. Clicking the **People Information +** will expand the category and allow you to select specific People Information records by which you can narrow your Records Results. Records counts indicating the number of records related to your search appear to the right of the People Information category and sub-categories.
2. Click the **People Information** checkbox to filter by all People Information or select specific People Information sub-categories by clicking the boxes next to the sub-categories by which you wish to narrow your results.
3. If People Information is the only filter you wish to apply to your Records Results data, click **Apply Filters**. The filter will be applied to update your Records Results data and provide you with a narrowed set of results.

   Note You can set other filter options before clicking Apply Filters to narrow your results even further.

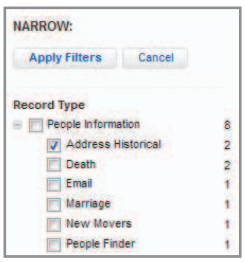


Figure 6-3. Filter Records by People Information

Filter by Assets

Records Results can be narrowed by all Assets or by specific Assets.

1. Clicking the **Assets +** will expand the category and allow you to select specific Assets records by which you can narrow your Records Results. Records counts indicating the number of records related to your search appear to the right of the Assets category and sub-categories.
2. Click the **Assets checkbox** to filter by all Adverse Information or select particular sub-categories of Assets by clicking the boxes next to the sub-categories by which you wish to narrow your results.
3. If Assets is the only filter you wish to apply to your Records Results, click **Apply Filters**. The filter will be applied to update your Records Results list and provide you with a narrowed set of results.

   Note You can set other filter options before clicking Apply Filters to narrow your results even further.

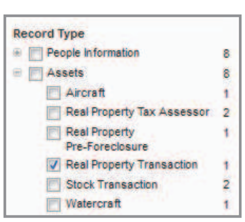


Figure 6-4. Filter Records by Assets

Filter by Adverse Information

Records Results can be narrowed by all Adverse Information or by specific Adverse Information.

1. Clicking the **Adverse Information +** will expand the category and allow you to select specific Adverse Information records by which you can narrow your Records Results. Records counts, indicating the number of records related to your search, appear to the right of the Adverse Information category and sub-categories.
2. Click the **Adverse Information checkbox** to filter by all Adverse Information or select particular sub-categories of Adverse Information by clicking the boxes next to the sub-categories by which you wish to narrow your results.
3. If Adverse Information is the only filter you wish to apply to your Records Results data, click **Apply Filters**. The filter will be applied to update your Records Results data and provide you with a narrowed set of results.

   Note You can set other filter options (e.g., assets, licenses) before clicking Apply Filters to narrow your results even further.

Figure 6-5. Filter Records by Adverse Information

Filter by Business & Employment Records

Records Results can be narrowed by all Business & Employment records or by specific Business & Employment records.

1. Clicking the **Business & Employment +** will expand the category and allow you to select specific Business & Employment records by which you can narrow your Records Results. Records counts, indicating the number of records related to your search, appear to the right of the Business & Employment category and sub-categories.
2. Click the **Business & Employment checkbox** to filter by all Business & Employment records or select particular records sub-categories by clicking the boxes next to the sub-categories by which you wish to narrow your results.
3. If Business & Employment is the only filter you wish to apply to your Records Results data, click **Apply Filters**. The filter will be applied to update your Records Results data and provide you with a narrowed set of results.

   Note You can set other filter options before clicking Apply Filters to narrow your results even further.

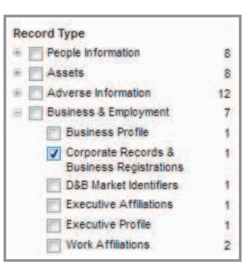


Figure 6-6. Filter Records by Business & Employment

Filter by Licenses

Records Results can be narrowed by all Licenses or by specific Licenses.

1. Clicking the **Licenses +** will expand the category and allow you to select specific Licenses by which you can narrow your Records Results. Records counts, indicating the number of records related to your search, appear to the right of the Licenses category and sub-categories.
2. Click the **Licenses checkbox** to filter by all Licenses or select particular Licenses by clicking the boxes next to the licenses by which you wish to narrow your results.
3. If Licenses is the only filter you wish to apply to your Records Results data, click **Apply Filters**. The filter will be applied to update your Records Results data and provide you with a narrowed set of results.

   Note You can set other filter options before clicking Apply Filters to narrow your results even further.

Figure 6-7. Filter Records by Licenses

RECORDS RESULTS TOOLS

Additional Records Results tools include the following:

- Back to Public Records – Click the **Back to Public Records** link to return to the Public Records category page at which you can initiate an entirely new search.
- **View All links** – Located to the right of each Records Results category indicating the number of records available within a particular category. Each results category will only show the first five results unless you click the View All link next to a category. Click any **View All** link to view all records in a particular category.

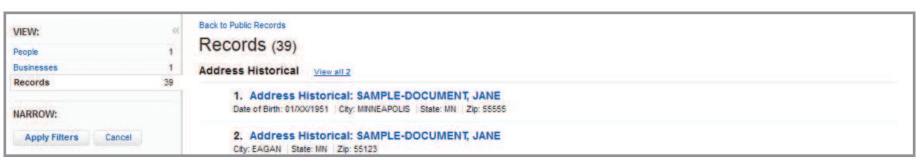


Figure 6-8. Click Back to Public Records / Click View All link(s)

Viewing Records Results

Content Sets are listed in alphabetical order by record category on the right side of the Records Results page with content filtering options (as described above) in the left column of the page. A scroll bar to the right of the Records Results List allows you to quickly scroll through the categories of records available
for viewing.

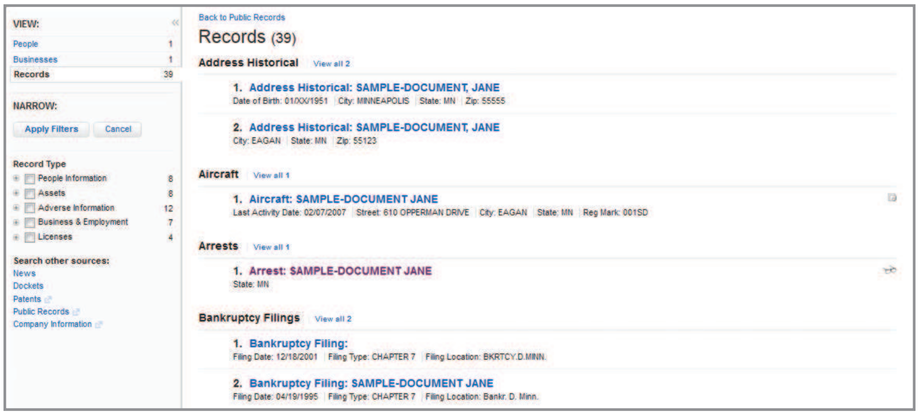


Figure 6-9. View Records Results List

Click an individual record title to display the full-text record, where you can view it and/or take other actions including setting Display Options, Add/View Annotations, Save to a Folder, Select a Delivery Method, and Fullscreen Mode. You can also return to the Records Results List by clicking **Return to List**.

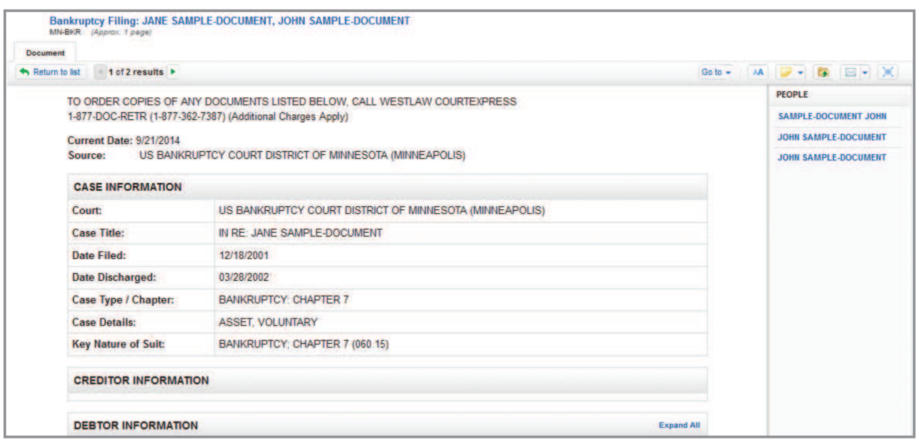


Figure 6-10. Full-Text Record/Return to Records Results List

After viewing a full-text record and returning to the Records Results List, an **Eyeglasses icon** appears to the right of the record as an indicator that you previously viewed it in the last 30 days for the current Client ID associated with your research. The Eyeglasses icon appears immediately after viewing a full-text record. If you discontinue your research for the Client ID in which you viewed the record and then go back to researching for the same client – within 30 days of your prior research – the Eyeglasses icon will appear to remind you that you previously viewed the record.

Out-of-plan content will initially be masked except for the content, title and counts. Click on a record to accept any additional charges and view the record.

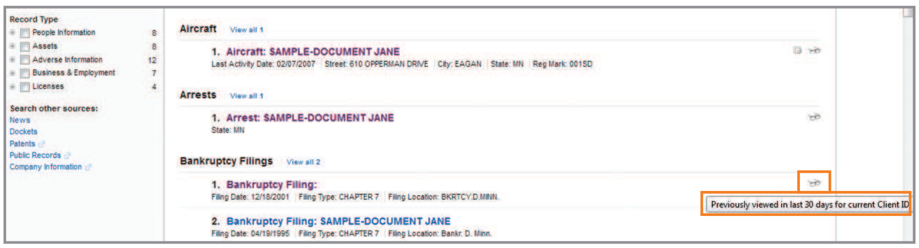


Figure 6-11. Eyeglasses icon indicating a previously viewed record

When viewing a full-text record, people related to the record may be listed to the right of the record. Clicking on the **name of a related person** opens a Person Summary with options to fully expand the Person Record by clicking the **View this Person** button, or create a Person Record report by clicking the **Create Report** button. If you expand a related person in the People Category of the full-text record before delivering results, the additional person information can be delivered inline with the full-text record by selecting the Content to Append tab in the Delivery Option window (see below for additional details on Delivery Options). This feature can be helpful to provide additional relevant information about an entity with the full-text record.

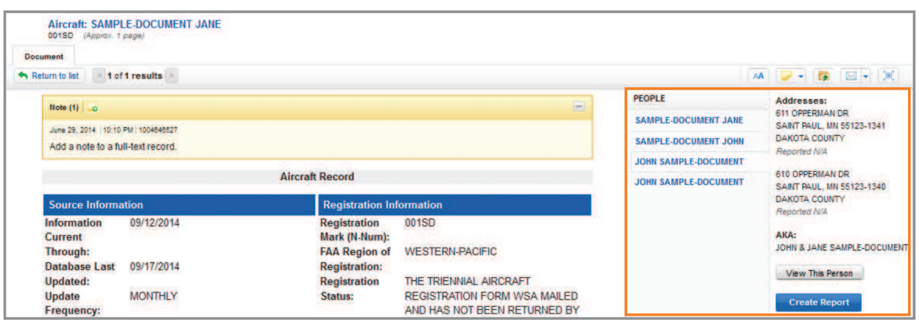


Figure 6-12. Expand person record from full-text record

FULL-TEXT RECORDS TOOLS

Full-Text Records Tools include the following:

- **Display Options** allows you to modify the appearance of text as displayed for your full-text Record, including size, font type, and margin width. Click **Display Options**, modify text size, font type, and margin width, view the modifications via the Preview box, and click **Save**, or click **Cancel** to exit Display Options.

  Note If you have previously modified Display Options and wish to Restore Default Options, click the **Restore Default Options** link within the Display Options window.

- **Annotations** allows you to add notes to full-text records and to show such annotations. To add a note, click the **Annotations drop-down arrow** and click **Add Note**, which will open a window into which you will **type your note** and click **Save**.

The **Show Annotations checkbox** is checked by default and ensures that notes you add to a full-text record will show when the record is viewed. Uncheck the Show Annotations checkbox to prevent your notes from appearing with a full-text record.

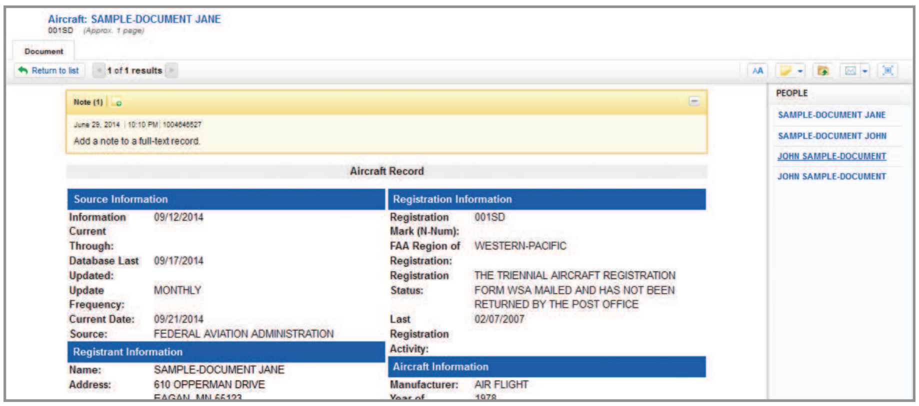


Figure 6-13. Full-text record with Annotation showing

- **Save to Folder** allows you to save a full-text record to folders within WestlawNext. Click **Save to Folder** to open a window displaying your WestlawNext folders, select an existing folder by clicking on it and click **Save**, or click **New Folder** to create a new WestlawNext folder (you will need to name it and select a location for it and click **OK** before you can save your full-text record in it), create a new folder, select the new folder by clicking it, and click **Save** to save your full-text record to the new folder. Foldered puplic records may be shared with others that have the same or greater access rights to Public Records in WestlawNext than the person who foldered the record. A person who is not authorized for the foldered Public Records information will be blocked from viewing the records.

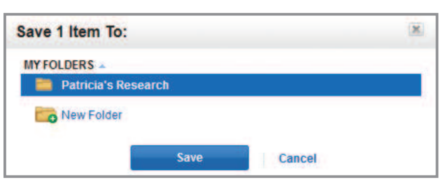


Figure 6-14. Save full text record to WestlawNext folder

Note Full-text records that have been saved to a folder will automatically update in the folder with any record updates made in PeopleMap.

Note Records remain in the folder until deleted. Standard WestlawNext foldering rules apply with records available at no additional charge for one year.

- **Delivery Options** allows you to Email, Print, and Download full-text records or Send them to Amazon Kindle. Click the **Delivery Options drop-down arrow** and **select a delivery option**. All Delivery Options require you to choose to deliver either the Document only or the Document with Annotations and each has a Layout and Limits tab by which you can modify the text and layout of your full-text record. The **Email** option also requires you to enter the recipient's email address (or multiple email addresses); select a report format – Word, PDF, RTF, or WordPerfect; add an optional email note; and has a Content to Append tab by which you can append additional content. The **Print** option also includes a Content to Append tab to append additional content before printing. The **Download** option requires you to select a format option – Word, PDF, RTF, or WordPefect – and has a Content to Append tab by which you can append additional content before downloading. **Send to Amazon Kindle** requires you to enter a Kindle email address and includes a Help icon, which provides specific formatting and other requirements specific to delivering a report to Amazon Kindle.

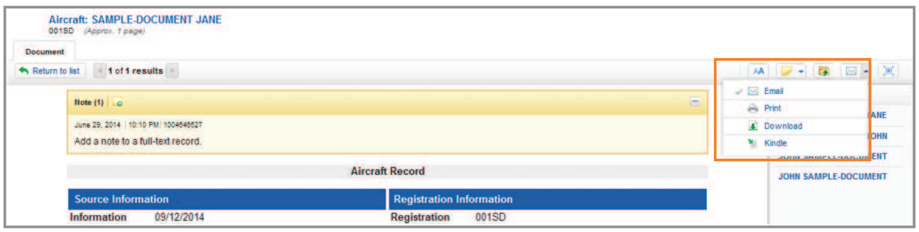


Figure 6-15. Full-text record delivery options – Email, Print, Download, and Kindle

- **Fullscreen Mode** allows you to view a full screen version of the full-text Record. Click the **Fullscreen Mode** button to view the record in the full screen of your computer; click the button again to return to the default view.

You can create a report of the associated person by selecting the name from the right-hand side of the record. Once you select a name, you will be given the option to **View This Person** or **Create Report**.

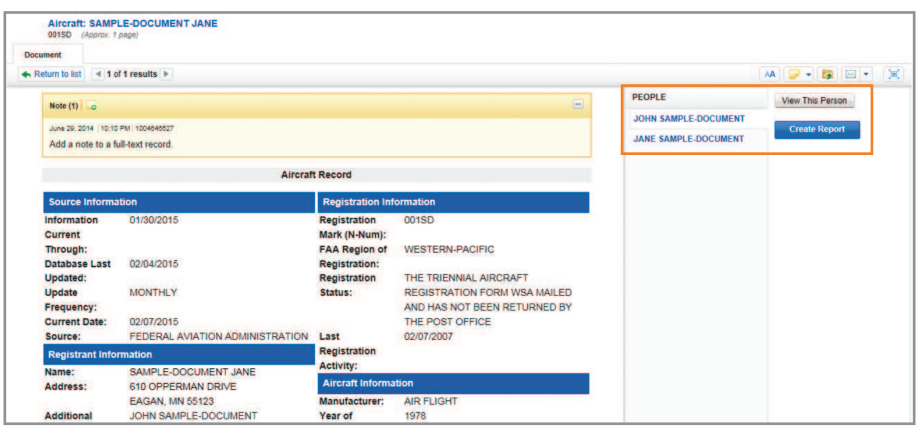


Figure 6-16. View Person or Create report of the People Result

7 Business Results and Company Investigator

Businesses Results

After conducting a search, the default data presented is People Results, which is a list of individuals that may be the subject of your search. Click the **Businesses** radio button on the Public Records template or the businesses link at the top left of a Person or Record result to access business entities related to your search. Filters are available to manipulate the Businesses results list located to the left of the list. Other tools are also available on the Businesses Results page, including a Back to Public Records link that will return you to the search page from which you started your search.

Figure 5-1. View Businesses search results

The Businesses Results page includes tools to filter results, change the number of results available per page, sort the results list, deliver a result list, access a Company Investigator report and Company Family Tree, where available.

The Businesses Results tools operate in the same manner as the People Results tools. See "Section 4, PeopleMap Results" on page 10 for specific instructions.

Each Business Name contained in the Businesses Results list is a link to further information, reports, and company family trees for each result. Click a business name to link to the Company Investigator page, which includes basic company information, a Company Family Tree button, and a Create Report button.

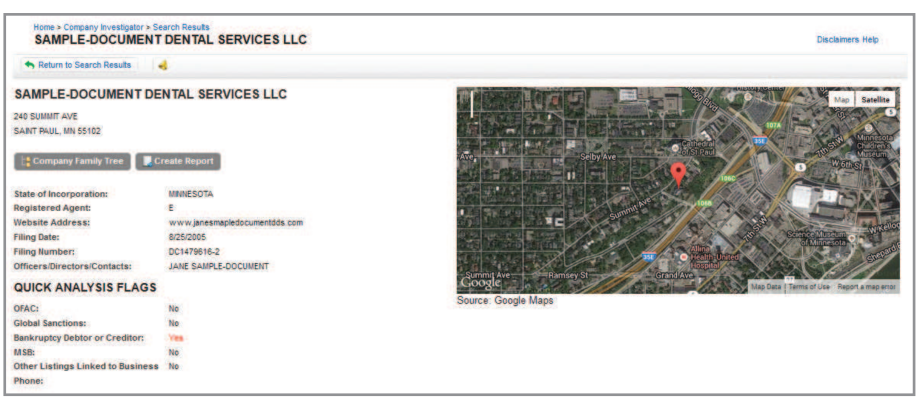


Figure 5-2. View Businesses

Note Company Investigator may be purchased separately or with a PeopleMap subscription to provide the most comprehensive due diligence solution.

8 PeopleMap Alerts

Stay on top of changes with PeopleMap Alerts

Now you have the ability to keep up with changes regarding your subject of interest. PeopleMap allows you to create Alerts for a person when you want to be notified if any key information changes on the person you are investigating. The Alerts feature automatically monitors the status of data you select at time intervals you select. Alert notices can be received on a periodic basis, from daily up to monthly frequencies, and delivered to you via an email or upon your next visit to the WestlawNext alert center.

The Alerts functionality allows you to choose to be alerted when any information changes on a person, or select only specific attributes, such as a new address or phone, to trigger an Alert.

Alerts are divided into the following data categories:

- Specific Attributes
- Potentially Adverse
- Potential Assets
- Licenses
- Business Information
- Person Information

When modifications or new facts are added to the record, PeopleMap sends a notification to keep you updated with the most current information.

EASY SETUP

Click the bell icon on your subject within PeopleMap to set up the report.

QUICK RETRIEVAL

Quick link in email connects you to the updated information from the alert.

FREQUENT ALERTING

Choose your own alert frequency for each subject.

- Monthly
- Bi-Weekly
- Weekly
- Weekday (M-F)
- Daily

SEAMLESS INTEGRATION

View PeopleMap Alerts within WestlawNext's alert center.

- Easily edit or delete alerts

9 Mobile PeopleMap

Overview

PeopleMap is compatible for use on most mobile devices, including tablets and Smartphones when using the WestlawNext full site at www.next.westlaw.com.

Note Some mobile browsers automatically flip a user to a mobile site, in which case you will need to click a full-site option in the browser option menu.

9 Help and Support

Technical Support

Contact Technical Support if you experience performance issues, encounter an error message or have other technical questions.

WestlawNext PeopleMap

1-888-728-7677
24 hours a day, 365 days a year

Customer Service

Contact Customer Service for billing or account assistance.
1-800-328-4880
7 a.m. to 8 p.m. CT, Monday – Friday
west.westlawnextcustserv@thomsonreuters.com
http://west.thomson.com/support/

Reference Attorneys

Contact a Reference Attorney if you need help researching a legal issue or working with WestlawNext PeopleMap.
1-800-REF-ATTY (1-800-733-2889)
24 hours a day, 365 days a year
west.forms.westlaw@thomsonreuters.com

Thomson Reuters
610 Opperman Drive
Eagan, MN 55123-1396

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