The LexisNexis® services
Quick Reference

Basic Steps to a LexisNexis Research Session

Walk through a research session at www.lexis.com. Familiarize yourself with the simple steps to: Signing on, Retrieving Documents by Cite, Selecting Research Sources and Developing a Search Request. Also learn to Validate Authority with Shepard’s® Citations Service, Print Documents and request LexisNexis® Alert Updates. (For more in-depth tips on using the LexisNexis services, ask your LexisNexis account executive for a Learning LexisNexis guide.)

Signing On

1. Establish an Internet connection. Enter the following address: www.lexis.com
2. Type your LexisNexis® ID and password. Click SIGN ON.
   (Would you like to create a Custom ID and password, e.g., an easy-to-remember alias or nickname? Click the Create a Custom ID link.)
3. Click a tab at the top of the menu screen to select a research option.
   Basic tabs include:
   • Search (For more details on using this tab, go to pages 4 – 8.)
   • Research Tasks (See page 3.)
   • Search Advisor (See page 3.)
   • Get a Document (See page 2.)
   • Shepard’s (See page 10.)
   • Alerts (See page 9.)

Note: All screens shown may change slightly as new sources and enhancements are added.

The Remember My Sign On Information is a great time-saving option for your personal computer. Automatic sign-on promptly gains access to the LexisNexis services. The Remember My Sign On Information is not recommended for public work stations.
Get a Document
Retrieve individual full-text documents—cases, state and U.S. statutes, agency decisions, law review and treatise articles and more—with Get a Document. This example shows you how to retrieve a document with its citation. You can also use party names or docket numbers to retrieve documents.

Get a Document by Its Citation
1. Click the GET A DOCUMENT tab.
2. Click the Citation tab. (Citation is the default setting. To retrieve documents by Party Name or Docket Number, select the appropriate tab.)
3. Type the citation, e.g., 253 f3d 34.
4. Click Get.
(Need help with the citation format for the document you want? Click the Citation Formats link. Enter a publication name or explore publication names alphabetically.)

Get and Print Documents
Deliver multiple full-text documents or multiple Shepard’s Citations Service reports with one search, from one screen. Here’s how:
1. Click the GET A DOCUMENT tab.
2. Click the Get & Print link.
   Note: You may be asked for your LexisNexis ID and password.
3. Enter a session name (up to 32 characters) in the SESSION field.
   Note: A client name may be required, depending on your subscription.
4. Type your citations, separated by semicolons.
5. Select a report service, e.g., full text or Shepardized™, and a delivery method, e.g., attached printer. Click Get.
Explore a Legal Topic: Lexis® Search Advisor

Lexis Search Advisor is a logical way to begin research in a specific area of law. Select your practice area, then search for your topic. Or drill down through topic categories to find the topic you need. Then, research topic case law, law reviews, agency materials, treatises—even legal news. Or retrieve cases with LexisNexis® Headnotes on that topic.

1. Click the SEARCH ADVISOR tab.
2. Choose your topic.
   You have three options:
   a) Choose From Recently Used Legal Topics
   b) Enter a search, e.g., fair use defense in Option 1.
   c) Click an area of law in Option 2, e.g., Copyright Law. Then select topics.
3. Search available resources on your topic. For example, to research case law, select a case law jurisdiction, enter search words and click Search. To find LexisNexis Headnotes on this topic, select a jurisdiction and click Go.

Research Practice Resources: LexisNexis® Research Tasks Pages

LexisNexis Research Tasks pages focus on specific areas of law, pulling together valuable resources on one screen page. The pages also combine source selection and searching.

Here's How:
1. Click the RESEARCH TASKS tab.
2. Select an area of law or jurisdiction, e.g., Tax.
3. Go to any task box. Select a link to go to full-text information, e.g., Tax Analysts Tax Notes Today. OR select a resource from a drop-down menu, e.g., Private Letter Ruling, and add your search terms or numbers, e.g., 199905024. Click Go.
Selecting Sources From the *lexis.com* Menu

At the main menu screen at *lexis.com*, you can select sources for research five ways:

A. **Choose From Recently Used Sources**
   
   *Here’s How:* Click the down arrow to display your last 20 sources. Highlight the source you want to search.

B. **Explore Sources Using the Legal, News & Business and Public Records tabs**
   
   *Here’s How:* Select an appropriate tab. Then point and click through the hierarchy until you find the source you need. (Each selection you make creates a “trail” showing your path at the top of the screen.) Click a source name to select it.
   
   (To select more than one source, click the white check box next to each source name. Move between menu pages to select sources if you wish. Then click **Combine Sources**. Your combined source set will be saved in Recently Used Sources for repeat use.)

C. **Find a Source Using the Long Name**
   
   *Here’s How:* Click the **FIND A SOURCE** tab. Enter words contained in the source name. Click **Find**.

D. **Find a Source Using the Short Name**
   
   *Here’s How:* Click the **FIND A SOURCE** tab. Click the Short Name radio button. Enter the short name (library/file name), e.g., *news;nyt*. Click **Find**.

E. **Find a Source Using the Alphanumeric Links**
   
   *Here’s How:* Click the **FIND A SOURCE** tab. Click the alphanumeric (0 – 9 or A through Z) links to review specific sources. Click the name of the source you need.
Completing the Search Form

1. Select the search format you want to use.

   **Terms and Connectors** (Boolean search logic) uses words and connectors to create phrases and concepts, e.g., *drug test OR screen AND employ*. Click on a connector in the online Search Connectors box for examples. Also see page 6.

   **Natural Language** (the FREESTYLE™ feature) uses “plain English” questions or phrases (as you would in conversation), e.g., *Can employment drug screening be a contract arbitration issue?* Results are ranked by relevance.

   **LexisNexis® Easy Search**™ is for simple, two- to three-word searches in Boolean or natural language (similar to Internet search engines). Use quotation marks for “phrase searching.” You cannot use segment or date restrictions. Results are ranked by relevance.

2. Type your search words. Click **Suggest Terms for My Search** to find additional terms. Other options:

   Terms and Connectors—Search specific parts or segments of documents. Click the drop-down **Select a Segment** box for a list of available segments. Also see page 6 for tips on developing a segment search.

   Natural Language—If you want a term to appear in retrieved documents, add **Mandatory Terms**.

3. **TIME TO DOUBLE CHECK!** Click **Check Spelling**. You’ll save time and improve accuracy by replacing misspelled words and finding alternative search words.

4. Click **Search**.

**LexisNexis® Toolbar**

Search the LexisNexis services from any Web site by using the LexisNexis Toolbar. The Toolbar stays on your Web browser. When you see an item of interest, you can search by:

- Entering terms in the LexisNexis Toolbar search box, e.g., *immigrat! /5 legislat! or bill or act* (See graphic.) Then select a source and click **Search**. (You will be asked for your LexisNexis ID and password.) Or ...

- Highlight text of interest on the Web page, select a source and click **Search**.
Developing a Search Request

Universal Characters and Connectors

Use Universal Characters in your search words:

\[!\] litigat! = litigate, litigation, litigating, litigator, etc.  
\[*\] wom*n = woman and women  
\[bank***\] = bank, banking, banker (but not bankrupt)

Use Connectors to link search words: (The Search Connector box on the online Search Form also has examples.)

**OR** doctor OR physician

**/n** market /5 share  
(use any number from 1 to 255)

**/s**\(^1\) sanction /s frivolous!  
(within the same sentence)

**/p**\(^1\) rule 11 /p sanction  
(within the same paragraph)

AND deregulat! AND bank***  
(anywhere in the same documents)

PRE cable PRE/2 tv OR television  
(the first word must precede the second within a specified number of words)

\(^1\)/s and /p cannot be used with /n.

Precision Search Commands

**atleast10(cercla)** finds documents that mention CERCLA at least 10 times. Find documents with major coverage of your topic. Use any number between 1 and 255.

**allcaps(aids) OR acquired immun!** finds words with all capital letters, e.g., AIDS

**nocaps(aid)** finds aid but not AIDS

**caps(jobs)** finds first-letter capital, e.g., Steve Jobs but not jobs market

**plural(job)** finds plural forms only, e.g., Steve Jobs and jobs market but not job creation

**singular(job) /5 discrimination** finds singular form only, e.g., job discrimination

Segments

Restrict your search to specific parts, or segments, of documents, e.g., the headline of a news article or the heading of a case. Choose segments on the Search Form. (See page 5.) For example:

**name (roe and wade)** find cases with specific party names

**writtenby(scalia)** find majority, concurring and dissenting opinions by a judge

**date is 3/30/2002** find documents from a specific date

**date bef 3/30/2002** find documents before a specific date

**date aft 3/30/2003** find documents after a specific date
Viewing Search Results

Display Formats

Cite—Displays a bibliographic list of the citations. (See Cite List Overviews below.)

KWIC™—Displays a 25-word window of text around your search words. To vary the number, click KWIC then KWIC+25. Type a number from 1 to 99. Click OK.

Full—Displays the full text of your document.

Custom—Lets you display the document parts or segments you want to view.

Cite List Overviews

Cite List Overviews, shown here, provide a summary of the case’s legal issues to help you determine quickly which documents are relevant.

Tabbed Results Sets

If you combine more than one source to research (see page 4, item B), you’ll receive a Summary Results page, offering up to 12 tabs by source type, e.g., case law, statutes, regulations, news, etc.

- Click a blue link to view results for a source, e.g., CFR – Federal Tax Regulations – 5
- Click a specific tab to show all the results for that tab.
- Rest your cursor on a tab’s red arrow and a pop-up screen shows you the document results types available for that tab.

For easy navigation, your results tabs stay on the top of your screen as you browse documents.
Refining Your Research Results

Narrowing Your Results with the FOCUS Feature

Use the FOCUS feature to pinpoint words within your search results—even if those words were not part of your original search request. Narrow your results to a particular topic.

*Here’s How:*

1. After you review your research results, go to the FOCUS terms bar at the top of your search results. Add words and connectors to your search, e.g., AND fair use
2. Click Go.

The FOCUS feature will search all of the retrieved documents. (OR select specific documents. As you review your results, click the Select for FOCUS™ or Delivery checkboxes for documents you want to research further.) To return to your original results, click the Exit FOCUS™ link at the top of your screen.

Finding Cases with Similar LexisNexis Headnotes

Are there similar LexisNexis Headnotes in other cases? The LexisNexis More Like This Headnote feature will show you. Once you find a relevant LexisNexis Headnote:

1. Click the More Like This Headnote link at the end of the headnote.
2. Choose your jurisdiction. (The jurisdiction you were just searching is the default.)
3. Click Search.

Receive up to 250 cases with the most closely matched headnotes or case discussions, ranked by relevance. To move to all available LexisNexis Headnotes on that topic, click the green Retrieve All Headnotes icon, choose a jurisdiction and click Go.
Requesting Research Updates:  
The LexisNexis Alert Feature

Use the LexisNexis Alert feature to get regular research updates without re-entering your search. View results online or receive via e-mail. The ALERTS tab on the main www.lexis.com menu screen offers:

**Alerts** (set-up example shown below)—Follow any research issues ... legal, news, legislative/political and more, on a monthly, weekly, business daily or daily basis—even up to three times a day.

**Shepard’s Alert™** (set-up example on page 10)—Get regular updates on citing authorities that could potentially affect the validity of your case.

**CourtLink® Alerts**—Get regular updates on court filing activity. Move directly to the familiar LexisNexis® CourtLink® screens and features—without signing off the LexisNexis services.

To Set Up a LexisNexis Alert Update  
(formerly ECLIPSE™ Update)

First review your search results. Then click the **Save as Alert** link. (You can select this link even if your search found 0 documents.) Fill in the Save Alert form:

**A.** Name your saved search.

**B.** Select your update frequency:
- *monthly* (and choose the date and time of day)
- *weekly* (and choose the weekday and time of day)
- *every business day* (select one, two or three times per day)
- *every day* (select one, two or three times per day)

**C.** Choose your delivery option—online, printer or e-mail. If you select e-mail, provide an e-mail address for the delivery. Click Email Options to personalize your e-mail update subject line and choose attachment type and formatting.

**D.** If you want to be notified via e-mail when your search does not retrieve new documents, click the check box. (Applicable only when the e-mail delivery option is selected.)

**E.** To exclude any duplicate documents, click this check box.

**F.** To be notified via e-mail each time your search retrieves new documents, click this check box and add your e-mail address.

After you’ve made your Save Alert form selections, click **SAVE**.

Each time your search is updated, you receive only new items. Your stored LexisNexis Alert searches are listed every time you select the ALERTS tab then the Alerts-ECLIPSE sub-tab. From this sub-tab, you can also:
- Edit or update your saved search
- Run a FOCUS search on the most recent search results
- Review previous results
Setting Up a Shepard’s Alert

Gain access to the Shepard’s Alert set-up screen several ways:

- Select the SHEPARD’S tab on the main menu screen. Enter a citation and click the Set up a Shepard’s Alert link. Then click SET UP.
- Select the ALERTS tab. Select Shepard’s Alert. Enter a citation and click SET UP.
- Click on the Save as Shepard’s Alert link at the top of your Shepard’s report.
- Fast set up! On the www.lexis.com sign-on page, enter your LexisNexis ID and password, select the Set Up a Shepard’s Alert radio button. Enter a citation; click Go.

At the Shepard’s Alert set-up screen:

A. Name your Shepard’s update search. (The case name is the default.)
B. Select the types of changes to monitor.
C. Select your update schedule. Also select a date to end your updates.
D. Select your delivery options—online or via e-mail.
E. Click Continue. Review your selections. To confirm, click Save.

Just as with LexisNexis Alerts, saved Shepard’s Alert searches are listed every time you select the Alerts tab then the Shepard’s Alert sub-tab. You can review current and previous results. You can also update, edit, or pause your Shepard’s Alert search.

Shepardizing™

Is your authority good law? Validate a case, U.S. or state statute, U.S. regulation and much more with Shepard’s Citations Service. Shepard’s also shows you cases and other authorities that have cited your case.

To Shepardize a document:
1. Click the Shepard’s tab.
2. Enter the citation, e.g., 800 f2d 111
3. Click Check.

*Pricing varies by market. Please contact your LexisNexis representative or Customer Support for more information.
### Reading Your Shepard's Report

**A. Shepard's Signal indicators show that the McNeil ruling has strong negative treatment in its subsequent history.**

**B. New!** Find LexisNexis Headnote references. HN16(60) means Headnote 16 of your case has been referenced 60 times in citing cases.

**C. New!** See the full text of the LexisNexis Headnotes associated with your case.

**D. Link to vital references—even LexisNexis Headnotes and treatises—from here. Or ...**

**E. Use the lower Navigation Bar.** Select a treatment, jurisdiction or LexisNexis Headnote and go!

**F. New!** Customize your report even more—all on one screen. Restrict by specific treatments, headnotes, jurisdictions or dates. Or find vital points of law or fact patterns within references.

**G. Click a treatment phrase, e.g., “followed by,” to get a detailed definition. Or click the Legend link in the lower navigation bar.** Get definitions, e.g., Shepard's Orange Q, which draws your attention to citing references that question the validity or precedential value of your case.

**H. Shepard's Table of Authorities identifies the cases your case cited and includes Shepard's Signal indicators to indicate the cases’ treatment by other courts.**

**I. Click a pinpoint page number; move to that page within the reference. Click HN16 and move to that portion of the citing case where Headnote 16 issues are discussed.**

**J. The Display Options link lets you display or hide your citing references' Shepard's Signal indicators, pinpoint page numbers and headnote references.**

**K. Click on the citation and view the full text of the document you Shepardized.**
Delivering Documents

Printing to a dedicated LexisNexis printer or to an attached printer

These options are displayed in the upper right corner of each document in your result set.

Click Print on any search results page. You can specify any of several print options, including dual-column; use of bold, italics and underlining; choice of type fonts; page breaks; and more.

The FAST Print Feature

Eliminate steps in the printing process by using the FAST Print shortcut.

One-time setup

1. Click the FAST Print button on your search results screen.
2. Select a LexisNexis dedicated printer or a format for the attached printer from the pull-down menu, and click Set.

Using FAST Print after initial setup*

In Cite view, click the FAST Print button and select whether to print the current page or the entire Cite list.

In KWIC, Full and Custom views, click the FAST Print button to print the current document immediately.

Any print options, including dual-column printing, use of bold, italics and underlining or page breaks that you have previously selected on the Print Documents form are defaults.

*Note: Additional charges will be incurred to print any citation not included in your fixed-rate subscription plan. Printing documents may result in additional charges without any additional warning. Please contact your firm administrator or a LexisNexis representative if you have any questions.

FAST Print is not available for Netscape® 4.7.

Print Utility

The LexisNexis Print/Download utility allows you to print to your attached printer as easily as you can when printing to a LexisNexis stand-alone printer. If you are using an attached printer, you should download this utility to achieve maximum printing results from the FAST Print feature.

To download the utility:

1. Click the Print link on the search results screen.
2. Click Install Utility.
3. Follow the on-screen instructions to install the utility.* *

* *Note: Microsoft® Windows® 2000, Windows NT®, and Windows XP operating systems require users to have administrative privileges to install programs. If the utility does not install correctly, check with your system administrator or LexisNexis Customer Support at 1-800-543-6862.

If you have installed the utility and the link does not appear, make sure that JavaScript® is enabled on your browser. If the link still does not appear, check with LexisNexis Customer Support.

Download, FAX and E-mail delivery

Click the appropriate tab to download (in .txt or .rtf format), fax or e-mail documents to yourself or others.

Printing the Text Only

If you’d like to view, print or save a document's text only (no navigation bars, graphics, screen options, etc.) click Text Only.