Learning
LexisNexis®

An in-depth guide to using lexis.com®
Using Learning LexisNexis

Think of Learning LexisNexis® as a roadmap, ready to walk you through a basic research session at www.lexis.com. If you browse the guide’s table of contents below, you’ll see Learning LexisNexis is organized just like www.lexis.com.

Need help finding a topic of interest? In addition to scanning the Table of Contents below, also turn to the detailed subject index on page 34.

Table of Contents

Signing In ................................................................................................................................. 1
Create a Custom ID and Password .......................................................................................... 1
Search ....................................................................................................................................... 2
Selecting Sources ...................................................................................................................... 2
Completing the Search Form .................................................................................................... 4
Search Words and Connecting Search Words .......................................................................... 5
Precision Search Commands ................................................................................................... 5
Universal Characters (wildcards) ............................................................................................. 5
Connectors ............................................................................................................................... 6

Viewing and Analyzing Results
Display Formats ...................................................................................................................... 7
Browsing Documents .............................................................................................................. 8
Related Documents and Links (RDUs) .................................................................................. 8
Combined Search—Tabbed Results Sets .............................................................................. 9
LexisNexis Practitioner’s Toolbox for USCS and State Statutes ........................................... 10
Finding More Documents ...................................................................................................... 10

LexisNexis® Search by Topic or Headnote
Search by Topic ...................................................................................................................... 16
Search by Headnote (Retrieve All Headnotes) ........................................................................ 16

LexisNexis® Research Tasks
Research Tasks Pages ............................................................................................................ 18
LexisNexis Tax Center ............................................................................................................ 18

Get a Document
Get a Document by Its Citation .............................................................................................. 19
Citation Format Assistant ....................................................................................................... 19
Get a Document by Party Name ............................................................................................ 20
Get a Document by Docket Number .................................................................................... 20

Shepard’s® Citations Service
Shepardize® a Case or Statute at www.lexis.com .................................................................. 21
Reading Your Shepard’s Case Report ...................................................................................... 21
Reading Your Shepard’s Statute Report .................................................................................. 22
Shepard’s Summary: Look Here First! ................................................................................... 23
Use the Navigation Bar to Link to a Specific Treatment or Jurisdiction ................................. 24
Customizing Your Shepard’s Report: All Your Options are on One Screen ......................... 25
Using Shepard’s Table of Authorities ................................................................................... 26

LexisNexis® Alerts
To Set Up a LexisNexis Alert Update (formerly the ECLIPSE™ feature) ................................. 27
To Set Up a Shepard’s Alert® for Caselaw or Statutes ............................................................. 28
To Set Up a CourtLink® Alert ............................................................................................... 29

LexisNexis Total Litigator ....................................................................................................... 30
Lexis® Transactional Advisor ................................................................................................ 31
LexisNexis® Practice Centers ............................................................................................... 32

Counsel Selector ................................................................................................................... 33
Index to Learning LexisNexis® ............................................................................................. 34

Customer Support (in the U.S.)
LexisNexis Customers 1-800-543-6862
Legal Education Customers 1-800-455-3947
TDD 1-800-712-5306

Customer Support (Outside the U.S.)
Toll Free
Country Customer Support Number

Australia ................................. 0011-800-543-68621
Canada
(Toll Free) ............................... 1-800-533-3685
Canada
(Internet products support) ................ 1-866-293-3836
Caribbean ................................ 1-800-543-6862
China Beijing ....................... 1-937-859-5398 (collect)
China Shanghai .................... 1-937-859-5398 (collect)
France ................................. 00-0800-543-68621
Germany ......................... 0800-81-53740
Hong Kong, SAR ................. 800-96-8733
India ................................. 1-937-859-5398 (collect)
Korea ................................. 1-937-859-5398 (collect)
Jamaica ............................ 0-800-543-6862
Japan ................................. 00531-11-3259
Malaysia ......................... 1800 80 6374
Mexico ................................. 95-800-543-6862
New Zealand ...................... 0800-44-0814
Puerto Rico ......................... 1-800-543-6862
Saipan ................................. 1-800-543-6862
Singapore ......................... 800-1100 415
Switzerland ......................... 0800-89-7074
Taiwan ................................. 0800 110 3330
Trinidad/Tobago .................. 001-800-543-6862
England (UK) ...................... 00800-895-107
All other Non-U.S. locations ........ 1-937-859-5398 (collect)

Account Executive ____________

Telephone Number ____________
Signing In

1. Establish an Internet connection and enter the following address: www.lexis.com
2. Type your LexisNexis® ID and password and click Sign In.

Create a Custom ID and Password

To create an easy-to-remember alias or nickname for your ID, use the Custom ID feature. Each Custom ID is unique, i.e., no two LexisNexis subscribers can create the same Custom ID.

1. Click the Create a Custom ID link on the sign-in screen, then enter your current LexisNexis ID and password.
2. Type your new Custom ID and password. (Your Custom ID must be 6 – 25 characters and contain at least one number, e.g., “Rockstar1.” Your password should adhere to password guidelines listed on the screen.)
3. For security purposes, enter your e-mail address, choose a security question from the drop-down menu, and provide an answer. Click Finish. (Follow the screen instructions for printing a Custom ID card.)

Forgot Password? Choose this link on the sign-in screen. Enter your Custom ID and answer your security question. LexisNexis will send you an e-mail with a link to a secure Web site that contains your password. If you forget your Custom ID, contact LexisNexis Customer Support.

To change your Custom ID or password, your e-mail address for Custom ID, your security question and answer, etc., use the Custom ID Manager link on the sign-in screen.

Actual screens may vary slightly from this guide due to the frequent enhancements and product additions.
Selecting Sources

The Search/Source Selection screen displays by default after you log on at lexis.com®. Select sources in one of four ways:

A. Quick Search

Skip browsing the lexis.com menu hierarchy. Search multiple jurisdictions, practice areas and source categories at once:
1. Enter your search terms.
2. Pick source types, i.e., specific legal jurisdictions or practice areas and/or source categories, e.g., cases, news & business, forms, etc. Choose as many categories as you need. Click NEXT STEP.

Based on your selections, lexis.com creates a custom menu of appropriate single and group sources. Then:
3. Choose specific sources—up to 50. Click Search.

B. Recently Used Sources

Click the Recently Used Sources tab. Then:
1. Click the down arrow beside the field to display a list of the last 20 sources you used.
2. Highlight the source you want to use.

Note: lexis.com users now have the ability to change the Quick Search/Recently Used Sources tab default. The last tab you use to run a search when your lexis.com session ends is the first tab to appear the next time you log on. Thus, when you run a search using either the Quick Search or Recently Used Sources tabs, and then log off, that tab used will automatically appear first on your screen the next time you sign in to lexis.com.

C. Source Selection

Click through the source hierarchy until you reach the source you want to search. Sources are listed with the most commonly used at the top under each tab.

1. Click a tab for a content type. Continue to work your way through the source screen. Just point and click. (Each selection you make in the hierarchy creates a “trail” of links at the top of the screen. To return to any selection, just click the link.)
2. Click the source you want to search.

D. Find a Source tab

Click the FIND A SOURCE tab. You have two options:

Option 1: Type in a Keyword or Phrase. Enter:
- a few search words, e.g., mental health
- search words and connectors, labor /5 arbitrat!
- a short (library;file) name, e.g., to find The New York Times, ENTER: news;nyt

You can use a natural-language search as well as search words and connectors. You can enter search terms and possibly find relevant sources that don’t have the search terms in the publication title. Results are ranked by relevance.

Option 2: Browse Alphabetically

Select a letter of the alphabet and scroll through the list to find a source by its title.
**Combine Search: Combining Multiple Source Types**

Combine up to 50 sources in a single search, even different source types, e.g., cases, statutes, legislation, agency decisions and news.* Each source you can combine has a white checkbox next to the name. To combine sources:

1. **Check the box next to a source.** For example, under the Legal tab, select United States Code Service, CFR and FR (Federal Register).
2. **Now move to another tab.** Click the News & Business tab. Check News, *Most Recent Two Years (English, full text)*. Your Legal tab sources are still saved.
3. **When you’re done selecting sources,** click the **Combine Sources** button. You move to the online Search Form. (See next page.)

(See page 10 for tips on analyzing the Combined Search tabbed results.)

**Note:** To delete individual sources from your list of 20 most used sources (those you don’t use regularly), click **Edit Sources.**

**Custom Tabs**

You can create up to 14 custom tabs in addition to the four standard tabs (Legal, News & Business, Public Records, and Find a Source), so the jurisdictions, areas of law, and other source types you research most often are only a click away. You can easily remove or reorder a custom tab at any time. To add or edit a custom tab:

1. **Click Add/Edit Tabs.**

2. **Select an item in the list** and either double-click it or click **Add** to create a tab for the item. Click an item which has a custom tab and click **Remove** to delete it from the source selection page.

3. **Click Move Up** to move a selected current tab closer to the existing tabs on the first row of the source selection page.
4. **Click Move Down** to move a selected current tab farther away from the existing tabs on the source selection page.
5. **Click Show this tab at the beginning of each session** to have a custom tab from the pull-down menu appear at the beginning of each research session.
6. **Click Done** to apply any changes you have made.

*Public records sources are not available for combining.*
Completing the Search Form

Once you select your sources, you’re ready to enter your search on the online 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. For example, drug /15 test! OR screen! /10 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, e.g., Can employment drug screening be a contract arbitration issue? Use Natural Language to research conceptual issues rather than specific topics or when you’re searching complex issues and are unsure of the words to use. Results are ranked by relevance.

The Easy Search™ feature is for simple, two to three word searches in Boolean or Natural Language (similar to Internet search engines). Use quotation marks for “phrase searching.” Results are ranked by relevance.

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

For Terms and Connectors searches—Search specific parts or segments of documents. Click the drop-down Select a Segment box for a list of available segments. Choose a segment and enter your search terms. Click Add. (If you know the segment name, you can type it in the search box followed by your search terms in parentheses.) Also see Segment Searching below.

For Natural Language searches—if you want a term to appear in retrieved documents add Mandatory Terms. Or select a Segment and enter Mandatory Terms you want to appear in the segment.

3. Click Check Spelling.

4. Click Search.

Segment Searching

All documents at lexis.com are divided into parts that are common to that document type. For example, cases contain the party names, a docket number, date, the opinion, etc. Restrict your search to a specific segment of a document, such as the headline of a news story, the judge who wrote the case’s opinion, the heading of a statute, etc. For example, to find:

Cases when you know the names of the parties: ENTER: name (mackey AND byrd)

All opinions written by a particular judge: ENTER: written by (scalio)

Cases in which a particular law firm participated: ENTER: counsel (marbury AND madison)

Cases decided on, before or after a particular date:
date is 2/01/2002
date bef 2/01/2002
date aft 2/01/2002

News stories that mention the Sarbanes-Oxley Act in the headline or lead paragraph: ENTER: hlead (sarbanes oxley)

All sections of Title 18, Chapter 96 of the U.S. Code which deal with racketeering: ENTER: heading (18 AND 96 AND racketeer)
Search Words and Connecting Search Words

Words
A search word is a single character or characters, alphabetical or numeric, with a space on either side. A hyphen is treated as a space.

Examples:

<table>
<thead>
<tr>
<th>Search Word</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>mcpherson</td>
<td>one searchable word</td>
</tr>
<tr>
<td>$1988</td>
<td>one searchable word</td>
</tr>
<tr>
<td>§ 1988</td>
<td>two searchable words</td>
</tr>
<tr>
<td>pretrial</td>
<td>one searchable word</td>
</tr>
<tr>
<td>pre-trial</td>
<td>two searchable words</td>
</tr>
<tr>
<td>pre trial</td>
<td>two searchable words</td>
</tr>
</tbody>
</table>

Plural and possessive forms of regular nouns are retrieved automatically. City finds city, cities, city’s or cities’. Writ finds writ, writes, write’s or writes’. For irregular nouns, see Universal Characters below.

Equivalents are retrieved automatically. For example, cal finds California, CA, Calif. and California.

@—Use this symbol if your keyboard doesn’t offer the section symbol (§), e.g., @305 or 305

Precision Search Commands
In addition to Connectors (see next page), you can also use these commands with your search words.

- **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 but not job creation

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

- **atleast10(cercla)**
  finds documents that mention CERCLA at least 10 times. Good for finding documents with major coverage of your topic. Use any number between 1 and 255 with the ATLEAST command.

Universal Characters (wildcards)

The asterisk *
Replaces one letter. Use more than one * in a word, anywhere except as the first letter.

- wom*n—finds woman and women
- bank***—finds bank, banking, banked, but not bankrupt or bankruptcy, which have more than three letters after k.

The exclamation point !
Replaces an infinite number of letters after a word root. Use only one ! per word, at the word end.

- litigat!—finds variations on litigate (litigation, litigating, litigator, litigated, etc.)
- child!—finds variations on child (children, childless, childish, etc.)
Connectors

Connectors establish relationships among search words. Next to the online search form, use the Search Connector box to help select connectors. (Rest your cursor on a connector and view its definition and an example. Click View Search Commands for more details.)

<table>
<thead>
<tr>
<th>CONNECTOR</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR</td>
<td>doctor or physician finds either doctor or physician.</td>
</tr>
<tr>
<td>AND</td>
<td>bank AND deregulate finds bank and forms of the word deregulate anywhere in the same document.</td>
</tr>
<tr>
<td>/n</td>
<td>market /5 share finds market within five words of share. Using /5 links two words that may appear side by side or separated by up to four words. Get share of the market as well as market share. (You cannot use /n in the same search with /p or /s.)</td>
</tr>
<tr>
<td>/p</td>
<td>rule /p sanction finds rule within the same paragraph as sanction.</td>
</tr>
<tr>
<td>/s</td>
<td>sanction /s frivolous finds sanction within the same sentence as frivolous.</td>
</tr>
<tr>
<td>PRE/n</td>
<td>pay PRE/3 television finds documents in which the first word precedes the second by three words or less.</td>
</tr>
<tr>
<td>NOT/n</td>
<td>rico NOT/2 puerto looks for documents with the first word. The second word need not be found, but if it is, it cannot be within two words of the first word.</td>
</tr>
<tr>
<td>AND NOT</td>
<td>trust AND NOT charitable finds documents with trust but without charitable anywhere in the document. Use AND NOT as the last connector in your search.</td>
</tr>
</tbody>
</table>

How Connectors Work

Connectors operate in the following order of priority:

First: OR

Second: /n, PRE/n, NOT/n

Third: /s

Fourth: /p

Fifth: AND

Sixth: AND NOT

If you use two or more of the same connectors, they operate left to right and, if number connectors are used, the smallest number operates first.

Here’s an example of how connectors operate:

bankrupt! /25 dischag! AND student OR college OR education! /5 loan

1. OR creates a unit, joining student OR college OR education
2. /5, the smaller of the number connectors, ties together loan and the unit of student OR college OR education
3. /25 creates a unit of bankrupt! /25 dischag!
4. AND operates last and links the units formed in 2 and 3.

Using Parentheses to Change Priority

Example:

mary /3 smith OR jane /3 jones OR william /3 matthews

This search looks for smith OR jane and then jones OR william.

Use parentheses to override the normal priority and create units of mary and smith, jane and jones and william and matthews. This search will now look for documents with one, two or all three of the name units.

(mary /3 smith) OR (jane /3 jones) OR (william /3 matthews)
Viewing and Analyzing Results

The LexisNexis services provide all the tools you need to analyze documents quickly, identify those that are on point, and retrieve additional relevant documents such as news articles and public records.

You’ll find a variety of ways to display documents that let you review your results as efficiently as possible.

Display Formats

Cite—displays a bibliographic list of the citations.

Cite List Overviews (shown at right)—provide you a summary of the case’s legal issues to help you quickly determine which documents in your results are relevant.

Virtual Digest View—(Available for Retrieve All Headnotes results and More Like This Headnote results only. Not shown here. See page 12.) Shows case citations, plus relevant LexisNexis Headnotes and/or paragraphs most relevant to your topic.

KWIC™ +25—the default lets you display a 25-word window of text around your search terms. To vary the number of words, click KWIC, then click 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.

TOC View—sources arranged hierarchically by topic, such as statutes, regulations and treatises are displayed automatically in TOC (Table of Contents) format. Browse or search the TOC. (Though not shown here, turn to page 14 for TOC navigating and searching details.)
Browsing Documents

LexisNexis Case Summaries

Written by attorney-editors, LexisNexis case summaries are targeted synopses of cases. Each case summary contains three sections:

1. **Procedural Posture** describes the case's procedural history—how the case arrived before the court.
2. **Overview** provides a brief review of the court's holding on the legal issues raised.
3. **Outcome** reviews the procedural disposition of the case.

Core Terms

Core Terms are the most frequently used words and phrases from the text of a case. They offer you a quick snapshot of the content based on the court's own language.

LexisNexis Headnotes

LexisNexis headnotes are key legal points of a case drawn directly from the language of the court.

Use LexisNexis headnotes to:

- **A** Track the language used by the court in discussing the key points of law in the case.
- **B** Uncover additional information by linking directly to relevant sections in the case, other related documents, related headnotes, or to LexisNexis Search by Topic or Headnote.
- **C** Review the main points of a case easily.

See page 12 for more details on how to use LexisNexis headnotes to find additional cases.

View Available Briefs and Other Documents Related to this Case

Click this link to move to links to available case documents, such as U.S. Supreme Court Briefs and Oral Arguments Transcripts.

Case in Brief

Click the Case in Brief link and move to a single PDF that compiles the vast LexisNexis content related to your case, including:

- controlling cases—and detailed explanations on why they are significant
- details on the parties' roles and relationships—even the arguments they raised
- references to pertinent annotated statutes, digests, treatises, law reviews, bar journal articles and legal encyclopedias
- practice tips and strategies
- hard-to-find resources such as news articles and CourtLink® court records

Even find links to original sources documents for the case. Each Case in Brief report can be refreshed and updated as soon as new information becomes available.

Case In Brief treatment is reserved only for selected cases—cases from the U.S. Supreme Court's current term, key cases in various practice areas, cases of first impression and cases in the news.
Related Content

Gain a Broader Range of Sources Related to the Case You are Viewing

Related Content brings together all the related documents for the case law document you are viewing and makes them readily available to you. Related Content provides convenient access to additional information about the case you are viewing so you can fully understand the impact of the case, the arguments to support the case, or the impact of various issues found within the case. Related Content will show in a left-hand navigation pane which highlights this content without having to search for it or to even know that it exists.

Related Content provides comprehensive case analysis from Shepard’s Citations Service, Cases in Brief, Emerging Issues commentaries and court documents. Complete issue analysis is developed from the exclusive combination of Matthew Bender treatises and practice guides, ALR® and AmJur®, BNA®, law journals, and more. The convenient Document Outline makes it easy to go directly to specific areas of the case you are viewing.

Features

A. The Related Content navigation pane automatically appears on each case. Click the yellow arrow bar on the right side of the panel to hide the Related Content panel during your session.

B. The Related Court Materials section contains links to additional analysis on the various issues found within the case law document.

C. The Document Outline section allows you to navigate through sections of the case that is currently on your screen.

D. Click here to hide the Related Content navigation pane for this session.

E. As you use the Next and Previous arrows to view other documents in your results, the Related content pane updates as well, to display links to the related items for each new document, with the new case name shown at the top.

F. The Shepard’s Signal appears at the top, immediately alerting you to the status of the case you are viewing.
Combined Search—Tabbed Results Sets

After you enter your Combined Search (see page 3 for details on combining sources), you can see how many documents were found for each source type—quickly. You receive a summary page with tabbed results, offering up to 12 tabs by source type, e.g., case law, statutes and regulations, etc.

1. Click a blue link to view results for a source type. The number at the end of the link, e.g., CFR - Code of Federal Regulations, is the number of documents retrieved.

2. Click a specific tab to show all the results for that tab.

3. Rest your cursor on a tab’s red arrow, e.g., on the Treatises & Analytical Materials tab, and a pop-up screen shows you the document types available under that tab.

Your results tabs stay at the top of your screen as you browse documents for easy navigation. And you can print your results table summary as well as specific documents and document types. Just click the Print Summary Table link.

LexisNexis Practitioner’s Toolbox For USCS and State Statutes

This special display, available in full-text USCS and 21 states’ statutes documents, makes navigating statutes fast and easy. The LexisNexis Practitioner’s Toolbox also provides links to a variety of resources cited or referenced within the statute. And find links to enacted legislation that could affect that section.

The LexisNexis Practitioner’s Toolbox appears on the right side of your document. Each toolbox is unique to that statute, displaying only those section headings that occur in that statute. Click to move to a section within the statute or to references cited.

Note: Click the Retrieve Legislative Impact link and move directly to a table of amendments—and amending language by bill.
Using the Lower Navigation Frame

Use the navigation frame at the bottom of your search results page to go to specific points in a document, go to a specific reporter page in paginated legal documents, display a particular document, or go to a specific search term.

1. Navigating to a specific part of a document
When a document is displayed in Full format, you can click the **Explore** button, then use the menu to navigate within the document. Also move to the top of the document.

2. Navigating to a specific reporter page
Click the reporter name in the drop-down list next to **Page** (or in the running header of the document). The reporter name you select will be highlighted at the top of the page in red; the page references for that reporter will be highlighted in the document in red. Then click the text box next to **Go**, enter the page number you want to display, and click **Go**.

3. Displaying a Document
To display a particular document, enter its number in the box next to **Doc** and click **Go** (the number of documents in your results is displayed next to the Go button). Use the right or left arrows to go to the previous or next document in your results.

4. Navigating to a Specific Search Term
To go to specific search terms in the document:
- Click the right arrow to go to the first search term in the document.
- Enter the number of a search term in the box next to **Term** and click **Go** to go to a particular search term (the number of search terms in the document is displayed next to the Go button).
- Use the right or left arrows to go to the previous or next search terms in your results.
Finding More Documents

Sometimes you find a document that is right on point. You then want to know if there are other documents with similar fact patterns or similar language. At www.lexis.com, you can use LexisNexis headnotes, Core Cites, Core Terms or text you select yourself to find other similar, relevant documents.

More Like This Headnote

When you find a relevant LexisNexis headnote within a case, use the More Like This feature to find other cases with headnotes that contain similar language. The More Like This Headnote feature will also find closely matching language within the text of the opinion.

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. Click Search.
3. Review your results in the Virtual Digest view—a view that includes retrieved headnotes and the most closely matched paragraphs in the opinion. You can receive up to 250 cases with the most closely matched headnotes or case discussions, ranked by relevancy. Use the Sort By box at the top of the screen to re-sort by court/date or date. Use the links in the Digest view to move to particular cases, matching headnotes or discussions.
More Like This—Core Cites and More Like This—Core Terms

More Like This—Core Cites finds cases with similar citation patterns to your on-point case.

To find more documents like the one you are viewing:

1. Click the More Like This link at the top of your results screen.
2. To find cases with similar citation patterns, click the Core Cites radio button. OR, to find cases with similar Core Terms, click the Core Terms radio button.
   (To remove Core Terms from your search, uncheck the box next to that Core Term. If you wish, add additional Core Terms in the search box below the checked Core Terms.)
3. Add mandatory terms and restrict the search by date. (Optional)
4. Click Search.

More Like Selected Text

If you see a particular passage in a document that is relevant, you can create your own More Like This search. For example, you’re viewing Campbell v. Acuff-Rose Music, 510 U.S. 569 (1994), which deals with a summary judgment decision in a copyright infringement case. You see the relevant passage. Highlight the passage and click More Like Selected Text at the top of the results screen. The More Like This feature will enter a search using the terms you highlighted. Click Search. For best results, keep your selected passage relatively brief, e.g., not more than a paragraph. Concentrate, if possible, on a single issue.

Case Law Links

In LexisNexis case law, names of companies, judges and counsel are linked, i.e., select the drop-down arrow next to the link and move right to additional search results. For example, link to a company name and choose recent news, SEC filings, agency decisions regarding that company, U.S. and state cases where the company is a party and more.
Reviewing Your Search History Feature

Your LexisNexis searches and search results are saved automatically under the Recent Results tab of the Search History log for 24 hours from time of search. View the original saved results until 2 A.M. without incurring additional search charges.

To review your search history:

1. Click History in the upper right corner of the lexis.com menu screen.
2. A list of today’s recent results will display. Click an underlined search request under View Original Results to see saved results at no additional charge. Click Re-run/Edit to update or revise the search with your usual charges.
3. Click the Archived Activity tab to display a list of searches from the previous 29 days. Click an underlined search request to rerun or edit the request. (You will receive an on-screen notification if you are searching a source outside your subscription.)
4. Click Client ID or Date to sort all the requests. Click Set Filter to limit your history view to specific client(s) or date(s).

Narrowing Your Results with the FOCUS Feature

As you analyze the documents you find, you may decide to narrow your focus to a particular issue within your topic. Use the FOCUS feature to pinpoint words within your search results—even if those words were not part of your original search request.

To enter a FOCUS feature search, after you review your search results:

1. Go to the FOCUS™ Terms bar at the top of your results screen.
2. Type your search words, e.g., AND fair use
3. Click Go.

The FOCUS feature will automatically search all of your 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. The checkboxes appear in CITE, KWIC™ or FULL displays.

Searches (but not the results), including alert updates, are saved for an additional 29-day period under the Archived Activities tab. If you rerun a saved search, you will receive an on-screen notification if you are searching a source outside your subscription.

To review your search history:

1. Click History in the upper right corner of the lexis.com menu screen.
2. A list of today’s recent results will display. Click an underlined search request under View Original Results to see saved results at no additional charge. Click Re-run/Edit to update or revise the search with your usual charges.
3. Click the Archived Activity tab to display a list of searches from the previous 29 days.
   Click an underlined search request to rerun or edit the request. (You will receive an on-screen notification if you are searching a source outside your subscription.)
4. Click Client ID or Date to sort all the requests. Click Set Filter to limit your history view to specific client(s) or date(s).
Table of Contents Sources

Expandable Table of Contents sources, called TOCs, make it easy to navigate through U.S. and state statutes and regulations, treatises and other secondary sources. You can click through the TOC levels, open and close multiple TOC levels, search the full-text source or just the TOC.

For example, to browse the TOC for Moore's Federal Practice® – Civil to find in-depth analysis on sanctions under Rule 11 of the Federal Rules of Civil Procedure, select the source and click the Browse TOC link. Then:

1. Click on the TOC one level at a time:
   - Click any + to open that TOC level.
   - Click any – to close that level.

2. Click on levels with + or – to link to full-text documents. When viewing a full-text document, click TOC Hits or Return to Results to go back to your TOC search results.

3. Click black links to expand your research to adjacent levels or documents. To return to your TOC search results, click TOC Hits.

Open or close multiple TOC levels:
1. Rest your cursor on any + or –. A pop-up menu shows you how many levels are open and closed—and how many items are at each level.* Select a level and click.
2. Rest your cursor on any + or – to check your location. Select a level and click.* Select any full-text document. To return to the TOC, click the TOC link.

Your TOC search results show you a condensed TOC.

Or search the TOC for information on Sanctions under Rule 11 of the Federal Rules of Civil Procedure:

1. Type the following search in the TOC search box: sanctions /10 rule 11
2. Is the Table of Contents radio button checked? It is the default. Then click Search.

Your TOC search results show you a condensed TOC.

Every line is a link. Blue links go to TOC levels—including full-text sections—where your search words appear. Black links do not include your search words but give you access to adjacent levels and documents for context.
LexisNexis
Search by Topic or Headnote (formerly Search Advisor)

Need an entire overview on a topic? Unfamiliar with an area of law? Click the by **Topic or Headnote** sub-tab under the Search Tab.

**Search by Topic**
Compile relevant materials you need—in one search.
Not just primary law.
Cover multiple jurisdictions simultaneously, zeroing in on:
• primary law, including cases, codes, regulatory/administrative—even law review articles
• Matthew Bender treatise analyses
• practice aids—checklists, forms, etc.
• LexisNexis Briefs, Pleadings & Motions
• Mealey’s™ Litigation Reports and other relevant legal new sources

To Search by Topic or Headnote:
1. Select your topic. (Your last 20 topics are saved for quick return.) New Topic? You can:
   • Find a Legal Topic (Option 1); just search with several key words, e.g., ENTER: fair use /5 defense
   or
   • Explore Legal Topics (Option 2); Select one of 40+ practice areas, e.g., Copyright Law, and use the + to expand topic areas and − to collapse.

2. Fill in the Search across Sources or Search by Headnote box. For **Search by Topic**, select:
   • Jurisdictions—choose federal, all states, a specific state, all available municipalities—or click **Select Multiple** and choose what fits your needs.
   • Sources—click the **Select Sources** button and select relevant courts, statutes and regulations, agency materials, analyses, news, etc. Click **OK-Use Selected**.
   • Search Terms (Optional)—if you’d like, add terms to refine your research, e.g., specific case facts.
   Then click **Search**.

For **Search by Headnote**, select a jurisdiction. (if you’d like you can restrict by date.) Click **Retrieve All**.
Reviewing Search by Topic Results
Your Search by Topic results are displayed in a tabbed results set. You can move among any content types, e.g., from cases to Nimmer on Copyright®, without losing your place.

See page 10 for more details on tabbed results sets.

Viewing Retrieve All Headnotes (Search by Headnote) Results
Your results for Retrieve All Headnotes and More Like This Headnote (see viewing and analyzing results on page 14) are displayed in the Virtual Digest view, which shows case citations, plus their relevant LexisNexis headnotes and/or paragraphs most relevant to your topic.

You can:

A. Link to the discussion of the headnote in the opinion. Click its link, e.g., HN5. You can also link to the full text of any paragraph shown. Click its pinpoint page cite, e.g., [*312]

B. Use the More Like This Headnote link to find additional headnotes.

C. Maybe you only want cases with headnotes classified under the topic. Click the Show Headnotes Only link at the top of the screen.

D. Find the cases most frequently cited by the other cases under the topic, i.e., the "influential cases." Click the down arrow next to the Sort By box at the top of your results screen. Select Frequently Cited.

Following each citation in the Frequently Cited sorting list, find the number of citings listed in green. To move to those case citings, click the View link. Then, to see each particular citing reference listed, click the Show Hits link.

E. View In-Depth Discussions only. (You want a better understanding of the topic.) Click the In-Depth Discussions link. You get the top 15 cases that provide significant explanation of your topic.

F. Click on the "i" icon next to your topic and get details on what that topic covers. For example, Fair Use Factors "covers the factors listed in 17 USCS §107 to be considered in determining whether the use made of a work in any particular case is a fair use, including the purpose and character of the use; the nature of the copyrighted work; the amount of substantiality of the portion used; and the effect upon the plaintiff's potential market." Also find selected search terms important to this topic.
LexisNexis Research Tasks

Special lexis.com pages focus on specific areas of law, jurisdictions or the workflow of a specific practice type. These pages compile the resources practitioners need, saving valuable research time. Click the Research Tasks tab. Choose a practice area or jurisdiction.

Research Tasks Pages
These pages combine source selection and searching on a single screen. For example, most pages offer legal news, forms, Get a Document and/or Shepardize, analytical materials by Matthew Bender, CCH®, BNA and/or other publishers, links to related Web sites, etc. Select a source from the menu, add search words and click Go.

LexisNexis Practice Centers, featured in Lexis® Transactional Advisor, can also be opened from the Research Tasks tab. (See pages 31 – 32 for more details on Lexis Transactional Advisor and LexisNexis Practice Centers.)

Set a Page as Your Research Starting Point!
1. Log on to www.lexis.com; click Preferences (top right main menu)
2. Select Research Tasks under Start Location. Click Set.
3. Go to Research Tasks. Select a page. Click Set as my Default Research Task Page at the top of that page.

In addition to Research Tasks pages, the Research Tasks tab also gives you one-click access to LexisNexis Tax Center. This special page compiles cases, codes, regulations and analyses from major publishers, plus it gives tax practitioners the option to combine these multiple content types into one search, e.g., search cases, Internal Revenue Code, and CCH Standard Federal Tax Reporter simultaneously. Also find a link to the LexisNexis Tax Center when you select the Taxation area of law menu.
Get a Document

Retrieve individual documents from the LexisNexis services quickly and easily with the Get a Document tab. Use the citation, the names of the parties, or the docket number to retrieve documents.

Get a Document by Its Citation

1. Click the Get a Document tab.
2. Click the by Citation tab. (by Citation is also the default setting.)
3. Type in the citation for the document you want to retrieve, e.g., 253 F3d 34
4. Click Get.

Citation Format Assistant

If you are not sure of the citation format for the document you want to retrieve, click Citation Formats.

Option 1: Find a Citation Format
Enter a complete or partial publication name. For example, type: virginia journal or virginia journal of international law. Click Find.

Option 2: Explore Publications Alphabetically
Click a letter of the alphabet in the letter navigation bar to view publications beginning with that letter.

Click the abbreviation to the right of a publication name. A template like the one below will appear. Enter an appropriate citation in the template and click Get.
Get a Document by Party Name

Retrieve Cases, CourtLink Dockets and LexisNexis Briefs, Pleadings and Motions by party names

1. Type the names of the parties in the Party fields (the party names do not have to be in plaintiff vs. defendant order, e.g., United States in the first box and Microsoft in the second box). If you only know the name of one party, type it in the first box.

2. Choose the jurisdiction for the cited case you would like to see.

3. You may choose the court that relates best to your case (optional).

4. Select a date range from the drop-down list (optional).

5. Click Search.

Get a Document by Docket Number

Retrieve Cases and CourtLink Dockets by Docket Number

1. Type a docket number in the Docket Number field, for example, 00-8452.

2. Choose the jurisdiction for the cited case you would like to see.

3. Select a date range from the drop-down list (optional).

4. Click Search.

Note: Because letters, rather than numbers, are sometimes used in the first part of the docket number, and an abbreviation for the court or type of matter may appear between two numbers, the safest way to search for a docket number is by using the AND connector.

For example, to search for “92 CIV. 7703” you would type 92 AND 7703 in the Docket Number field.
**Shepard's® Citations Service**

**Is it good law?**

The *Shepard's* Citations Service provides the comprehensive citations history and treatment coverage necessary to verify the status of:

- Federal case law
- Case law from all 50 states, Washington, D.C. and Puerto Rico
- United State Code sections and statutes from all 50 states and Washington, D.C.
- Regulations, including the Code of Federal Regulations
- U.S. and state constitutional provisions
- Court rules, including the Federal Rules of Evidence and Federal Rules of Civil Procedure
- Law review articles from selected publications and annotations
- Individual U.S. patents

*Shepard's* can also be used to find authority, i.e., identifying cases, articles, or legislation that have cited your case or statute.

*Shepard's* results include:

- Editorial analysis available within 24 – 48 hours after a case decision is available online
- References to unpublished decisions, law reviews, treatises and LexisNexis headnotes
- Checks of an authority's official and unofficial citations
- Links to cases that cite your case
- Easy methods for researching specific points of law or fact patterns
- New summary report for statutes which include negative citing case treatment, affecting legislation, pending legislation (from selected states), and other citing references, e.g., Matthew Bender treatises; briefs; pleadings and motions; and, selected U.S. agency decisions.

**Shepardize® a Case or Statute at www.lexis.com**

1. Click the *Shepard's* tab at the top of the menu screen.

Note: To Shepardize the case or statute you are viewing, click the *Shepardize* link at the top of the document.

2. Type the citation on the open field.

3. Select *Shepard's for Validation* (KWIC) or *Shepard's for Research* (FULL) format. The default is FULL.

4. Click Check.

**Report Formats**

**Shepard's for Research** (FULL)—shows prior as well as subsequent history plus every available citing reference. It also includes the *Shepard's* Summary, which shows you at a glance how citing references impact your authority.

**Shepard's for Validation** (KWIC)—shows subsequent history, citing references with editorial treatment of your case, and new references that have not been analyzed by *Shepard's* editors.
**Reading Your Shepard's Case Report**

- **Shepard's** Signal indicators show that the McNeil ruling has strong negative treatment in its subsequent history.
- Find LexisNexis headnote references. HN16(60) means the issue discussed in Headnote 16 of your case has been referenced 60 times in citing cases.
- See the full text of the LexisNexis headnotes associated with your case.
- Link to vital references—even LexisNexis headnotes and treatises—from here. Or use the Navigation Bar. (See M.)
- The **Display Options** link lets you display or hide your citing references' **Shepard's** Signal indicators and pinpoint page numbers references.
- Save this cite for automatic updates.
- Click on the citation and view the full text of the document you **Shepardized**™.
- Click on a treatment phrase, e.g., “Followed by;” get a detailed definition.
- 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.
- **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.
- Click **Legend** to see the definitions of **Shepard's** Signals.
- 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.
- Use the lower Navigation Bar. Select a treatment, jurisdiction or LexisNexis headnote and go!
Reading Your *Shepard's* Statute Summary Report

The *Shepard's* Summary gives you all vital affecting authority at-a-glance, with links to full-text documents.

*Shepard's* Signal indicators give feedback on the status of your statute. The red exclamation point indicates strong negative treatment.

Click any analysis to move to citing references with that treatment phrase.

Click to see individual *Shepard's* reports for specific subsections.

Click on a citing reference type, e.g., Law Reviews, to view links to each reference in that category.

Link to recently enacted legislation, as well as pending bills, that reference your section and could potentially affect your section.

Use the *Shepard's* Alert feature to set up regular updates and receive automatic reports of changes to the statute.

Use FOCUS™-Restrict By to further restrict your view to specific treatments or jurisdictions. Even find specific words within the citing references.

Move to the full-text statute.

*Shepard's* Summary for Caselaw

Each *Shepard's* Summary presents an easy-to-read synopsis that brings the most vital information right to the top and shows you why your case received the *Shepard's* Signal indicator. For example, as shown below, you can quickly determine *McNeil* has been overruled on one point of law. You also discover it has been followed—a possible split of authority.

To move to any grouping shown:

1. Click the link for an analysis type, e.g., “Overruled.” Move to the first reference (case, law review, etc.) Click the reference’s name to move to the first mention of *McNeil*.

   If the citing reference is an opinion, click the pinpoint page-number link, e.g., p. 836, to move directly to where the specific analysis is given. Just click the Return to *Shepard's* link to return.

2. To move to the next citing reference with the same treatment, go to the *Shepard's* Navigation Bar in the lower-right corner. Click the right arrow.
Use the Navigation Bar to Link to a Specific Treatment or Jurisdiction

Click the drop-down menu next to Cites. Choose a treatment or jurisdiction ... and move directly to the selection you highlighted. Then, to move to chosen references, e.g.:

- **next cite**: click the right arrow at the end of the bar
- **previous cite**: click the left arrow
- **a specific reference** (e.g., 4 of 9): ENTER: 4 and click Go

**Shepard's Signal Indicator**

The Shepard's Signal is an at-a-glance indicator of the precedential status of a case or statute. To review this legend while you research in Shepard's, click the Legend link at the bottom-left side of your report.

- **Warning—Negative treatment indicated**
  Contains strong negative history of treatment of your case or statute (for example, overruled by or reversed).

- **Questioned—Validity questioned by citing references**
  Contains treatment that questions the continuing validity of precedential value of your case or statute because of intervening circumstances, including judicial or legislative overruling.

- **Caution—Possible negative treatment indicated**
  Contains history or treatment that may have a significant negative impact on your case or statute (for example, limited or criticized by).

- **Positive treatment indicated**
  Contains history or treatment that has a positive impact on your case or statute (for example, affirmed or followed by).

- **Cited and neutral analysis indicated**
  Contains treatment or your case or statute that is neither positive nor negative.

- **Citation information available**
  Indicates that citing references are available for your case or statute but do not have history or treatment analysis (for example, the references are law review citations).

- **Warning: Negative treatment is indicated for statute**
  Indicated that citing references contain strong negative treatment of your section, (for example, the section may have been found to be unconstitutional or void).
Customizing Your *Shepard's* Report: All Your Options are on One Screen

Now you can restrict your *Shepard's* report to specific treatment phrases AND find references with specific words—all on one screen. Click the **FOCUS™—Restrict By** link at the top of your *Shepard's* report.

**Custom Restriction** options restrict your report view to specific treatments, jurisdictions, LexisNexis headnotes, and/or dates. Click the box next to an option to select it. Select as many options as you need.

The **FOCUS** feature searches the text of citing references for specific words. Enter your search words in the **FOCUS terms** box, e.g., *front pay /30 future loss*.

When you’re done selecting restrictions and/or adding search words, click **Apply**.

Combine Custom Restrictions and the **FOCUS** feature to narrow your research quickly and effectively. Use Custom Restrictions first to select jurisdictions, treatments and/or date ranges most relevant to your research. Then use the **FOCUS** feature to zero in on authorities dealing specifically with your issues or facts.
Using Shepard’s Table of Authorities

Shepard’s Table of Authorities identifies the cases your case cited and includes Shepard’s Signal indicators to show how these cases have been treated thereafter. Shepard’s Table of Authorities reports provide:

- At-a-glance analysis of the foundation of a case uncovering hidden weaknesses in cases that have no obvious negative treatment
- Links to the text of a case for in-depth information on the legal authorities cited within a case
- A case-finding tool for specific legal issues or points of law
- Cases cited within law reviews that are available through the LexisNexis services

Note: Check the pinpoint page to see why a case was given the indicated editorial analysis. AS part of your secondary sources research, you can use Table of Authorities to retrieve a list of all the cases cited in a law review article.

You can request a Table of Authorities report three ways:

1. Click the link at the top right side while viewing a case.
2. Click the Table of Authorities link at the top of a Shepard’s report.
3. Click the Table of Authorities tab within the Shepard’s option.

The Shepard’s Table of Authorities report displays the list of cases in the following order:

- U.S. Supreme Court
- U.S. Circuit Courts then U.S. District Courts in numeric order
- Specialty courts
- State courts (alphabetically, highest court to lowest court)

Within the jurisdiction, the cases are arranged in the order that they are found in the decision and then by the volume number of the reporter if both appear on the same page.

Many of the features and functionality you find useful in Shepard’s Citations Service are also available through Shepard’s Table of Authorities, including the FOCUS feature, “pinpoint” page citations and the ability to print Table of Authorities reports.
LexisNexis Alerts

Use LexisNexis Alerts to get regular research updates that you can view online or receive via e-mail. The Alerts tab on the main www.lexis.com menu offers:

- **Alerts**—Follow any research issue … legal, news, legislative/political and more on a monthly, weekly, business daily, or daily basis—even up to three times per day.
- **Shepard's Alert**—Get regular updates on citing authorities that could potentially affect the validity of your case, as well as reports of pending or recently enacted legislation that could affect the validity of your statute. NOTE: Coverage of pending and recently enacted legislation is currently from selected states, with more states being added to achieve full 50-state coverage.
- **CourtLink Alert**—Get regular updates on court filing activity. Move directly to all the familiar CourtLink screens and features—without signing off the LexisNexis services.

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

First review your search results. Then click the Save as Alert link at the top of your results screen. (You can click this link even if your search found 0 documents.) Fill in the Save LexisNexis® 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 (once, twice or three times per day)
   - every day (once, twice 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 E-mail Options to personalize your e-mail update subject line and choose attachment type and formatting.
D. To exclude any duplicate documents, click this check box.
E. 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.)
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 LexisNexis® Alert form selections, click Save.

Each time your search is updated, you receive only new items. Your stored Alert searches can be found by selecting the Alerts tab, then the Alert sub-tab. From this sub-tab listing, you can:

- Edit or delete your saved search
- Run a FOCUS feature search on the most recent search results
- Review previous results
- Update your search on the spot
To Set Up a Shepard’s Alert® for Case law or Statutes:

Receive regular updates on citing authorities that could potentially affect the validity of your case, and on pending or recently-enacted legislation (from selected states) that could affect the validity of your statute.

Access the Shepard’s Alert set-up screen in several ways:

• Select the Shepard’s tab on the main lexis.com 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 Sign-In page for lexis.com, after entering your LexisNexis ID and password, select the Set up a Shepard’s Alert radio button, enter a citation and 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. Choose:
  • Any Change to the citation
  • New Negative Analysis only
  • A combination of settings you determine. Select the Custom Settings radio button, then click the Customize analysis, jurisdictions and LexisNexis Headnote settings link. Select Positive, Negative or other treatment changes. Select jurisdictions, any specific LexisNexis Headnote or available secondary source. Then click Apply

C Select your update schedule. Choose:
  • Once every business day (Monday – Friday)
  • Weekly (and select the day of the week—Monday through Sunday)
  • Every other week (and select the week day—Monday through Sunday)
  • Monthly (and select the date)
  • Select a date to end your updates

D Select your delivery options—online or via e-mail.
  (Click the Email Options ... link to personalize your e-mail update subject line and choose attachment type. Also choose to get an e-mail alert even when there is no change.)

E Click Continue. Review your selections. To confirm, click Save.

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

Shepard’s Alert for Statutes

The Shepard’s Alert feature makes it easy to stay up-to-date on recent or pending legislation that may affect the validity of your statute. Current coverage includes federal statutes and legislation, as well as statutes and legislation from selected states. Check with your LexisNexis account representative for recent updates.
To Set Up a CourtLink® Alert:

Select CourtLink Alerts after you choose the Alerts tab. Click Continue, then enter your CourtLink ID and password. This is where you will see a list of your current CourtLink Alert search results. You can also review existing CourtLink Alert searches by clicking the gray Manage Alerts tab.

To set up a new CourtLink Alert search:

1. Click the red Set New Alert button.
2. Select a type of Alert:
   - Attorney/Firm
   - Bankruptcy Chapter
   - Bankruptcy Creditor
   - Bankruptcy Debtor
   - Class Action
   - Criminal Defendant
   - Federal Appellate
   - Federal District/Nature of Suit
   - Judge
   - Litigant
   - Patent Number/Class
   - State Nature of Suite
3. After selecting an Alert type, you will move automatically to search criteria screens appropriate for your choice. Fill in the screen blanks, clicking Next and Back to move among the criteria screens. Then click Set New Alert.

CourtLink Single Search

Search across 80+ million dockets from CourtLink—plus an additional three million court-filed documents—all in one search. Use any concept, issue, or terms of interest.

Find the CourtLink Single Search box at the top of any CourtLink screen. (See graphic at bottom.) It’s also right up front on the LexisNexis Total Litigator page. Enter your search terms and Go! (Add client codes and project notes if needed.) Results are displayed under two tabs: one for dockets and one for documents. Left-hand navigation allows you to zero in by criteria such as date filed, case status, case type, litigation area, state, and court system. Results can also be e-mailed and printed.
LexisNexis Total Litigator

LexisNexis Total Litigator identifies key stages of the litigation lifecycle and provides a simple, yet comprehensive method for managing litigation tasks. Identify a task:

- early case assessment,
- drafting and filing,
- legal research,
- discovery,
- investigative research,
- trial preparation; and
- staying current.

LexisNexis Total Litigator will present the sources (as well as the products and services) that might be utilized to accomplish that task. Just:

1. Click the **Total Litigator** tab.
2. Select a task.
   
   **A** Click a link from the left navigation bar, e.g., **Companies** under Early Case Assessment.
   
   **Or**
   
   **B** Click a red sub-tab under Total Litigator, e.g., **Draft, File & Serve**.

3. LexisNexis Total Litigator walks you through the steps to the search form for that task.

   Plus, LexisNexis Total Litigator offers one-step search and current awareness—right from the home page:
   
   **C** My Favorite Tasks: Add the tasks you use often. To add, click edit. Also change the order in which the tasks appear.
   
   **D** My Recently Used Sources: Up to 20 saved automatically.
   
   **E** Quick Search: Select the task—and the search box adapts so you can add a cite, search words, etc.
   
   **F** Search Dockets & Documents: Use any concept to search 80+ million CourtLink dockets plus court-filed documents at once.
   
   **G** Litigation News: Updated daily. No search needed. Click a headline; get the full text.
   
   **H** Blogs: Interact with experts and colleagues. Find free tools, e.g., e-mail updates and RSS feeds.
   
   **I** Podcasts: Covering the latest area-of-law trends and issues. Download and listen at your convenience.
Lexis® Transactional Advisor

Lexis Transactional Advisor is your one-stop, online destination that offers a comprehensive combination of due diligence tools, legal analysis and practice-specific capabilities all organized to match your daily workflow. Choose from the following practice areas:

- Bankruptcy
- Corporate, Business, and Compliance
- Commercial
- Environmental
- Insurance
- International
- Mergers & Acquisitions
- Patent Law
- Real Estate
- Securities
- Tax

For example, from the main Transactional Advisor page, a corporate attorney can review commentaries on emerging issues that affect multiple transactional practices. They can use the Quick Find box to retrieve necessary real estate forms, or compare laws across 50 states to help them prepare for corporate policy. There are hundreds of legal resources, including many new sources arranged by task, such as due diligence, policy drafting, deal structuring, etc. (See next page for more on LexisNexis Practice Centers.)

Click the Transactional Advisor tab. Here you can complete a variety of tasks:

A. **Move directly to a practice center.** Need more details? Position your mouse on a practice area and read more.

B. **Get fast access to forms.** First select a deal type, e.g., Intellectual Property, then a form type, e.g., Copyright. Click **Go**.

C. **How does the law vary in different states?** Find out quickly. More than 300 topical surveys are available. No search needed. Just pick an area of law, jurisdiction and topic. Retrieve a spreadsheet with links to pertinent statutes, regulations and rules. All current … all compiled.

D. **What do the experts have to say on Emerging Issues?** Read the full text to learn more about issues that matter to you.
LexisNexis Practice Centers

Each practice center showcases LexisNexis legal resources arranged by practice area. Find information based on tasks to be completed rather than by specific source name. For example, in the Corporate, Business, and Compliance Practice Center, click Evaluate Risks & Conduct Due Diligence. Now you have access to legal analysis, public records, news— even one-stop report products—to help you investigate parties and assets, analyze damages & remedies and understand statutes of fraud.

Select a Practice Center as the default view when you click the Transactional Advisor tab. Display a practice center, then click the Set as my default Practice Center link in the navigation trail at the top of the screen.

From the Practice Centers, you can also link to the LexisNexis Community Pages on the Web. The Community Pages are free sites available by practice area. They provide an online forum to share your expertise and to collaborate within your community of professionals. Additionally you can access a host of free tools, e-mail updates, RSS feeds and Web widgets that work with your preferred Web search page. Listen to viewpoints through Webinars and download our selection of the most popular podcasts related to the legal industry. View the pages at www.lexisnexis.com/communities
Counsel Selector

Select the Counsel Selector tab and move directly to martindale.com® There you can:

A. Search lawyer/law firm profiles.
B. Check firm visibility at martindale.com. Top 10 Lists rank law firms according to the number of times researchers have searched for firm information during the last month.

C. Monitor and compare attorneys and firms through a customized Watch List. Register once and add lawyer and law firm profiles. Securely append comments to profiles. Compare lawyers and firms with the side-by-side comparison tool.

D. Check out Professional Resources for firm lawyers, corporate counsel, law schools, and bar associations.

E. Get details on corporate counsel best practices, including forums with CLE credit.

F. Search a database of more than 50,000 expert witnesses, process servers, court reporters and other legal market service providers.

G. Tap into free, full-text legal articles.

H. Read blog posts, comment and view comments on a variety of legal topics at the Martindale-Hubbell® Web site.

I. Learn more about new Martindale-Hubbell products and blog with martindale.com product experts.

Law Firm Profiles

Profiles are divided into easy-to-access, tabbed sections:

- **Overview**—quick links to all other profile sections.
- **People**—provides links to lawyers’ biographical profiles; refine by practice area and office location.
- **Practice Areas & Industries**—the firm’s statement of practice, group profiles and other information about its practice and experience; refine by office location.
- **Offices**
- **Diversity** programs (displays for diversity profiles subscribers only)—details the mix of minority and non-minority lawyers in the firm.
- **Legal Articles**—available at martindale.com, authored by firm members.
- **Peer Review Ratings**—a combined overview on all firm lawyers.
- **U.S. Federal Litigation Activity**—the top practice areas and jurisdictions where the firm has represented clients in U.S. District Court. (Covers a rolling two-year period.)
- **Transactional Activity**—the total number of mergers and acquisitions—and the dollar volume of those deals over the past two years, as reported by FactSet®.


At the end of each law firm profile, see if the firm rates on martindale.com Top 10 Lists, which feature the Top 10 firms by a number of criteria, including litigation and M&A activity, Peer Review Rated lawyers (total overall, total AV, BV and CV, etc.), visibility at martindale.com overall, etc.
Index to Learning LexisNexis®

®, 5
§ (section symbol), 5
* (as a universal character), 5
! (as a universal character), 5
Alert feature, LexisNexis, 27 – 29
  CourtLink Alert, 29
  CourtLink Single Search, 29
  LexisNexis Alerts (formerly ECLIPSE), 27
  Shepard's Alert, 28
Allcaps search command, 5
Asterisk (*), 5
Atleast search command, 5
Blogs, 30, 33
Boolean search logic, 4
Browsing documents, 8
Capitalization, 5
  Allcaps search command, 5
  Caps search command, 5
  Nocaps search command, 5
Caps search command, 5
Case in Brief, 8
Case Law Links, 13
Case Summaries, LexisNexis, 7, 8
Caution Shepard's Signal indicator, 24
Citation Format Assistant, 19
Citation information Shepard's Signal indicator, 24
Cite display, 7
Cite list overviews, 7
Cited and neutral analysis Shepard's Signal indicator, 24
Combine Search: Combining Multiple Source Types, 3
Combined Search—Tabbed Results Sets, 3, 10
Connectors, 6
  How Connectors work, 6
  Using parentheses to change priority, 6
Core Cites, LexisNexis, 12 – 13
Core Cites, More Like This, 13
Core Terms, LexisNexis, 12 – 13
Core Terms, More Like This, 13
Counsel Selector, 33
CourtLink Alert, 29
CourtLink Court Records, 8
CourtLink Single Search, 29
Custom display, 7
Custom ID, 1
Custom ID Manager link, 1
Custom password, 1
Custom restrictions in Shepard's, 25
Custom tabs, 3
Digest of cases, 17
Display formats, 7, 14
  Cite, 7, 14
  Cite List Overviews, 7
  Custom, 7
  Full, 7, 14
  KWIC, 7, 14
  TOC view, 7
Virtual Digest view, 7
Displaying a document, using the lower navigation frame, 11
Easy Search, LexisNexis, 4
ECLIPSE feature (now LexisNexis Alert feature), 27
Equivalents, 5
Exclamation point (!), 5
Explore button, 10
Find a Source, 2
  Using key words or phrases, 2
  Using connectors, 2
  Using the short name, 2
  Using the alphabetical links, 2
FOCUS feature, 14
  In Shepard's, 25, 26
FREESTYLE feature, 4
Full display, 7
Get a Document, 19 – 20
  By its citation, 19
  By docket number, 20
  By party name, 20
Headnote, More Like This, 7, 12, 17
Headnote, Search by, 17
Headnotes, LexisNexis, 12, 17, 22, 25, 28
Headnotes, Retrieve All, 7, 17
Headnotes, Show only, 17
History (research session) 14
In-Depth Discussion link, 17
KWIC display, 7
Law Firm Profiles, 33
Lexis Transactional Advisor, 31
LexisNexis Search by Topic or Headnote, 17
  Retrieve All Headnotes, 17
LexisNexis
  Alert, 27
  Case Summaries, 7, 8
  Core Terms, 7 8, 12, 13
  Headnotes, 7, 8, 12, 17, 22, 25, 26
  More Like This Headnote, 7, 12, 17
  Retrieve All Headnotes, 7, 17
  Search by Headnote, 17
  Show Headnotes Only, 17
LexisNexis—continued
  Practice Centers, 18, 32
  Practitioner's Toolbox for USCS and State Statutes, 9
  Research Tasks Pages, 18
  Search by Topic or Headnote, 17
  Tax Center, 18
  Total Litigator, 30
  Web Communities, 32
Mandatory terms, 4
martindale.com, 33
More Like This, 12 – 13
  Core Cites, 13
  Core Terms, 13
  Headnote, 12
  Selected Text, 13
Natural language searching, 4
Navigating, 11
  To a specific part of a document, 11
  To a specific reporter page, 11
  To a specific search term, 11
Nocaps search command, 5
Password, 1
Peer Review Ratings, 33
Phrase searching, 4
Plural search command, 5
Plurals, 5
Positive treatment Shepard's Signal indicator, 24
Possessives, 5
Practice Centers, LexisNexis, 18, 32
Practitioner's Toolbox for USCS and State Statutes, LexisNexis, 9
Questioned Shepard's Signal indicator, 24
Quick Search, 2, 30
Related Content, 9
Remember Me (Signing In), 1
Research Tasks pages, LexisNexis, 18
Search by Topic or Headnote, 17
Search commands, precision, 5
  Allcaps, 5
  Atleast, 5
  Caps, 5
  Nocaps, 5
  Plural, 5
  Singular, 5
Search formats, 4
  Easy Search, 4
  Natural language, 4
  Terms and connectors, 4
Search history feature, 14
Search words, 5
Section symbol ($§), 5
Segment searching, 4
Selected Text, More Like, 13
Shepard's Citations Service, 21 – 26
  Alert, 22, 23, 27, 28
  Custom restrictions, 25
  FOCUS, 23, 25, 26
  How to Shepardize a case, 21
  Navigation bar, 22
  Reports, 21 – 23
  Shepard's for Statutes, 21, 23
  Shepard's Signal indicators, 24
  Shepard's Summary, 23
  Table of Authorities, 22, 26
Short name to find a source, Using the, 2
Show headnotes only, 17
Show hits, 7, 17
Signing in, 1
Singular search command, 5
Sources, 2 – 3
  Combining multiple source types, 3
  Selecting Sources, 2
    Quick Search, 2
    Recently Used Sources, 2
    Source Selection, 2
    Find a Source tab, 2
Symbols, 5
  @, 5
  §, 5
Table of Authorities (TOA), Shepard's, 22, 26
Table of Contents (TOC) sources, 7, 15
Navigating, 15
Searching, 15
Tag docs, 7
Tax Center, LexisNexis, 17
TOA, Shepard's, 26
TOC, 7, 15
Total Litigator, LexisNexis, 30
Transactional Advisor, Lexis, 31
Terms and connectors searching, 4
Universal characters, 5
  Asterisk, 5
  Exclamation point, 5
View Search Commands link, 6
Virtual Digest view, 7, 12, 17
Warning Shepard's Signal indicator, 24
Web Communities, LexisNexis, 32
Words, 5
  Equivalents, 5
  Hyphenated, 5
  Plurals, 5
  Possessives, 5
Using Learning LexisNexis

Think of Learning LexisNexis® as a roadmap, ready to walk you through a basic research session at www.lexis.com. If you browse the guide's table of contents below, you’ll see Learning LexisNexis is organized just like www.lexis.com.

Need help finding a topic of interest? In addition to scanning the Table of Contents below, also turn to the detailed subject index on page 34.

Table of Contents

Signing In .................................................................................................................. 1
Create a Custom ID and Password ........................................................................ 1
Search ....................................................................................................................... 2
Selecting Sources .................................................................................................... 2
Completing the Search Form ................................................................................. 4
Search Words and Connecting Search Words ...................................................... 5
Precision Search Commands ................................................................................ 5
Universal Characters (wildcards) .......................................................................... 5
Connectors ............................................................................................................. 6
Viewing and Analyzing Results .......................................................................... 7
Display Formats ...................................................................................................... 7
Browsing Documents ............................................................................................ 8
Related Documents and Links (RDU) ................................................................ 9
Combined Search—Tabbed Results Sets ............................................................... 10
LexisNexis Practitioner’s Toolbox for USCS and State Statutes ....................... 10
Finding More Documents ..................................................................................... 12
LexisNexis® Search by Topic or Headnote ........................................................... 16
Search by Topic ..................................................................................................... 16
Search by Headnote (Retrieve All Headnotes) .................................................... 16
LexisNexis® Research Tasks ............................................................................... 18
Research Tasks Pages ............................................................................................ 18
LexisNexis Tax Center ........................................................................................... 18
Get a Document ..................................................................................................... 19
Get a Document by its Citation .......................................................................... 19
Citation Format Assistant ..................................................................................... 19
Get a Document by Party Name ........................................................................ 20
Get a Document by Docket Number ................................................................ 20
Shepards® Citations Service .............................................................................. 21
Shepardize® a Case or Statute at www.lexis.com ............................................... 21
Reading Your Shepards® Case Report ................................................................ 21
Reading Your Shepards® Statute Report .............................................................. 23
Shepards® Summary: Look Here First! ................................................................. 23
Use the Navigation Bar to Link to a Specific Treatment or Jurisdiction ........... 24
Customizing Your Shepard’s Report: All Your Options are on One Screen ...... 25
LexisNexis® Alerts ............................................................................................... 27
To Set Up a LexisNexis Alert Update (formerly the ECLIPSE feature) ........... 27
To Set Up a Shepard’s Alert for Caselaw or Statutes ...................................... 28
To Set Up a CourtLink® Alert ............................................................................. 29
LexisNexis Total Litigator .................................................................................... 30
Lexis® Transactional Advisor ............................................................................. 31
LexisNexis Practice Centers ............................................................................... 32
Counsel Selector .................................................................................................. 33
Index to Learning LexisNexis® .......................................................................... 34

Customer Support (in the U.S.)
LexisNexis Customers 1-800-543-6862
Legal Education Customers 1-800-455-3947
TDD 1-800-712-5306
(A Telephonic Device for the Deaf (TDD) is installed in the LexisNexis
Customer Support Department for persons who are hearing impaired)

Customer Support (Outside the U.S.)
Toll Free

<table>
<thead>
<tr>
<th>Country</th>
<th>Customer Support Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>0011-800-543-68621</td>
</tr>
<tr>
<td>Canada (Internet products support)</td>
<td>1-800-533-3685</td>
</tr>
<tr>
<td>Canada (CD-Rom products support)</td>
<td>1-866-293-3836</td>
</tr>
<tr>
<td>Caribbean</td>
<td>1-800-543-6862</td>
</tr>
<tr>
<td>China Beijing</td>
<td>1-917-859-5398 (collect)</td>
</tr>
<tr>
<td>China Shanghai</td>
<td>1-917-859-5398 (collect)</td>
</tr>
<tr>
<td>France</td>
<td>00-0800-543-68621</td>
</tr>
<tr>
<td>Germany</td>
<td>0800-81-53740</td>
</tr>
<tr>
<td>Hong Kong, SAR</td>
<td>800 96 8733</td>
</tr>
<tr>
<td>India</td>
<td>1-917-859-5398 (collect)</td>
</tr>
<tr>
<td>Korea</td>
<td>1-917-859-5398 (collect)</td>
</tr>
<tr>
<td>Jamaica</td>
<td>0-800-543-6862</td>
</tr>
<tr>
<td>Japan</td>
<td>00531-31-3259</td>
</tr>
<tr>
<td>Malaysia</td>
<td>1800 80 6374</td>
</tr>
<tr>
<td>Mexico</td>
<td>95-800-543-6862</td>
</tr>
<tr>
<td>New Zealand</td>
<td>0800-44-0814</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>1-800-543-6862</td>
</tr>
<tr>
<td>Saipen</td>
<td>1-800-543-6862</td>
</tr>
<tr>
<td>Singapore</td>
<td>800 1100 415</td>
</tr>
<tr>
<td>Switzerland</td>
<td>0800-89-7074</td>
</tr>
<tr>
<td>Taiwan</td>
<td>0800 110 3330</td>
</tr>
<tr>
<td>Trinidad/Tobago</td>
<td>001-800-543-6862</td>
</tr>
<tr>
<td>England (UK)</td>
<td>00800-895-107</td>
</tr>
<tr>
<td>All other Non-U.S. locations</td>
<td>1-917-859-5398 (collect)</td>
</tr>
</tbody>
</table>

Account Executive ___________________________________________________________________________

Telephone Number ___________________________________________________________________________
Learning LexisNexis®

An in-depth guide to using lexis.com®