

HOW TO USE LEXIS

The screenshot displays the Lexis website interface. At the top, there is a navigation bar with the Lexis logo on the left and links for "Switch Client", "Preferences", "Help", and "Sign Out" on the right. Below the navigation bar is a secondary menu with "My Lexis™", "Search", "Get a Document", "Shepard's®", and "More". On the far right of this menu are "History" and "Alerts" icons. A red "All" tab is active, with a "+ Add/Edit Subtabs" button next to it. The main content area is divided into several sections:

- Sources:** A "Help" link is present. Under the "All (Default Subtab)" heading, there are three columns of links:
 - Legal:** Cases - U.S., Court Records, Briefs and Filings, Expert Witness Analysis, Jury Verdicts & Settlements, Federal Legal - U.S., States Legal - U.S., Legislation & Politics - U.S. & U.K., Area of Law - By Topic, 50 State Multi-Jurisdictional Surveys, Secondary Legal, Legal News, Reference, Find Laws by Country or Region, LexisNexis(R) Information & Training.
 - News & Business:** Combined Sources, News, Market & Industry, Science & Technology, Country & Region (excluding U.S.), Featured Content & Services, Individual Publications, Company & Financial, EDGAR SEC Filings Enhanced Search Templates.
 - Public Records:** Find a Person, Find a Business, Find Assets, Find Filings, Watch/Risk List, Find Environmental Site Records, Public Records.
- Quick Tools:** A "Help" link and a text input field "Enter a citation or term". Below are buttons for "Get a Doc", "Shepardize®", "Find a Source", and "Lexis®Web".
- Quick Search:** A "View Tutorial | Help" link. It features a dropdown menu set to "FEDERAL & STATES COMBINED" with "Select Multiple" options. Below is a "Select Practice Area" dropdown with "Select Multiple" options. A "Source Categories" section includes checkboxes for "Treatises & Analytical Materials", "Forms", "Law Reviews & Journals", "Briefs, Motions, Pleadings & Verdicts", and "Jury Instructions". A "Next" button and "*Entry Required" note are at the bottom.
- Search by Topic or Headnote:** A "Help" link, a "Select Topic" dropdown, and a "Go" button. Below is the text "Don't see the topic you need?" and a "View more" link.

Following are some basic instruction on using Lexis online legal research. Note, however, that the best way to get to know Lexis is to get online and just use it!

PREFERENCES

You can pick and choose how you want Lexis to display or search options and search results. Here are a few suggestions.

Start Location

You can choose where Lexis starts each time you sign on. The Search page is probably the most useful.

Show check boxes for combining resources

Lexis allows you to search multiple databases by providing check boxes. Any boxes selected will be included in the search.

Natural Language

You can change the number of results that are returned for a search. You can also change the way the results are ordered. If you want them to appear by date, the most recent first, select to sort by "Date" instead of "Relevance."

Retrieve

This will tell Lexis how many cases or other authorities to show per page. It is set at first to 10 at a time, so if you get 50 results, there will be 5 pages with 10 results each.

Allow me to edit my search

When Lexis returns your search results, it can provide you with options for editing your search. For instance, if you find a particularly good headnote, you can ask Lexis to conduct a new search for more cases like that headnote. It is suggested that you keep all these checked.

Results view

This is some fine tuning, allowing the researcher to eliminate some of the Lexis options in when your results are shown. We suggest you leave this alone until you become familiar enough with Lexis to make personal preference choices.

Pagination Display

This option provides information as to the page by page setup of the document being viewed.

Case Law Display

When you are viewing a case, Lexis can show you several optional elements. You can de-select any of these that you want, but you probably want to leave them all selected.

Practitioner's Toolbox

Lexis has a tool called the Practitioner's Toolbox that provides information and research assistance. Leave it selected.

Country Code

Leave this selected as United States unless you are a Canadian student.

Enhanced Table of Contents Display

These are advanced options that provide tools while you are viewing an authority. Select the "Show floating cite assistant," as this can be a useful tool. You can de-select it later if you like.

History

Sets options for the history of a case. You can change the amount of retrievals at a time if you like, but leave the order in Reverse Chronological mode.

Now all you have to do is click on **SET**.

LAYOUT OF LEXIS

The screenshot displays the Lexis website interface. At the top, there is a navigation bar with the Lexis logo on the left and links for 'Switch Client', 'Preferences', 'Help', and 'Sign Out' on the right. Below the navigation bar, there are several tabs: 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. The 'Search' tab is currently selected. Below the tabs, there is a 'Quick Tools' section with a search input field and buttons for 'Get a Doc', 'Shepardize®', 'Find a Source', and 'Lexis®Web'. To the right of the 'Quick Tools' is a 'Quick Search' section with a dropdown menu for 'FEDERAL & STATES COMBINED' and a 'Next' button. Below the 'Quick Search' is a 'Search by Topic or Headnote' section with a 'Select Topic' dropdown and a 'Go' button. The main content area is divided into two columns: 'Legal' and 'News & Business'. The 'Legal' column lists various legal resources such as 'Cases - U.S.', 'Court Records, Briefs and Filings', and 'Federal Legal - U.S.'. The 'News & Business' column lists resources like 'Combined Sources', 'News', and 'Market & Industry'. There is also a 'Public Records' section with links like 'Find a Person' and 'Find a Business'.

The key to using Lexis is the TABS on the top left of the page. They look like this:

This is a close-up screenshot of the navigation tabs. The tabs are 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. Each tab has a small downward arrow indicating a drop-down menu. Below the tabs, there is a 'All' tab and a '+ Add/Edit Subtabs' button.

The Tabs

Notice that the new layout for Lexis has just a few tabs with drop-down options. To see more options, just click on the down arrow within the tab.

My Lexis Tab

A pre-set home page.

Search Tab

Choose a database and enter a search query to find relevant authority.

Get a Document Tab

Find a case, statute, or other document with just a title or citation.

Shepard's Tab

Determine whether authority is still valid.

More Tab

This is mostly Lexis trying to sell more services.

MY LEXIS TAB

The screenshot displays the Lexis My Lexis homepage. At the top, there is a navigation bar with the Lexis logo and a menu containing "My Lexis™", "Search", "Get a Document", "Shepard's®", and "More". Below this is a "Quick Search" section with a "Help" link. The search interface includes radio buttons for "Terms and Connectors", "Natural Language" (selected), and "Easy Search™". A search input field is followed by a "Next Step" button. Under "Select Sources By:", there are radio buttons for "Source Type" (selected) and "Recent Sources". The "Jurisdiction" dropdown is set to "FEDERAL & STATES, COMBINED" with a "Select Multiple..." link. The "Practice Area" dropdown is set to "Medical" with a "Select Multiple..." link. The "Source Categories" section has several checkboxes: "Treatises & Analytical Materials", "Briefs, Motions, Pleadings & Verdicts", and "Cases" are unchecked; "Forms", "Jury Instructions", "Statutes & Regulations", "Law Reviews & Journals", "News & Business", and "Agency Materials" are checked. Below the search section is a "My Search Tools" area with an "Add / Delete..." link. It contains four tool windows: "Get By Citation" (with "Enter Citation" and "Citation Formats" fields, a "Go" button, and radio buttons for "Get a Document" and "Shepardize®"); "Get & Print" (with "Enter Citation" and "Citation Formats" fields, a "Go" button, and a note "(Separate citations by a semicolon.)"); "Search the News" (with a "Source" dropdown set to "News - Previous 60 Days"); and "Martindale-Hubbell® Lawyer Search" (with "Last Name:" and "First Name:" input fields). To the right of these tools is a text box: "Add search forms and research tools to this page. Click the 'Add/Delete' link to the left. See the demo for details: View Tutorial. Tip: Arrange items on page by drag and drop." Below this text is a "Search the News" tool icon with a red box around it, and a "Source" dropdown set to "News - Previous 60".

This is a home page that provides up-to-the-minute legal news and resources. It also provides shortcuts to commonly used search tools. Very customizable.

SEARCH TAB

The screenshot displays the Lexis search interface. At the top, there is a navigation bar with 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. On the right, there are links for 'Switch Client', 'Preferences', 'Help', and 'Sign Out'. Below the navigation bar, there is a 'History' and 'Alerts' section. The main content area is divided into several sections: 'Sources' (with a 'Help' link), 'Quick Tools' (with a 'Help' link), 'Quick Search' (with 'View Tutorial' and 'Help' links), and 'Search by Topic or Headnote' (with a 'Help' link). The 'Sources' section is currently selected and shows a list of categories: 'Legal' (Cases - U.S., Court Records, Briefs and Filings, Expert Witness Analysis, Jury Verdicts & Settlements, Federal Legal - U.S., States Legal - U.S., Legislation & Politics - U.S. & U.K., Area of Law - By Topic, 50 State Multi-Jurisdictional Surveys, Secondary Legal, Legal News, Reference, Find Laws by Country or Region, LexisNexis(R) Information & Training), 'News & Business' (Combined Sources, News, Market & Industry, Science & Technology, Country & Region (excluding U.S.), Featured Content & Services, Individual Publications, Company & Financial, EDGAR SEC Filings Enhanced Search Templates), and 'Public Records' (Find a Person, Find a Business, Find Assets, Find Filings, Watch/Risk List, Find Environmental Site Records, Public Records). The 'Quick Tools' section has a search input field and buttons for 'Get a Doc', 'Shepardize®', 'Find a Source', and 'Lexis®Web'. The 'Quick Search' section has a dropdown menu for 'FEDERAL & STATES COMBINED' and a 'Next' button. The 'Search by Topic or Headnote' section has a dropdown menu for 'Select Topic' and a 'Go' button.

Allows you to choose a database in which to search, then allows you to enter a set of terms and phrases, called a query. Lexis will then retrieve authority relevant to your query from the selected database. Think of all the links as databases.

Sources

Shortcuts to many of the most popular research sources

Recently Used Sources

Very useful tool. Provides direct access to your most recently used databases.

Quick Tools

Helpful shortcut. Tip in a citation and click "Get a Doc" or "Shepardize" depending on what you are trying to do. Or enter a topic and click on "Find a Source."

Quick Search

Another tool to focus your research within a group of databases that match your criteria.

Search by Topic or Headnote

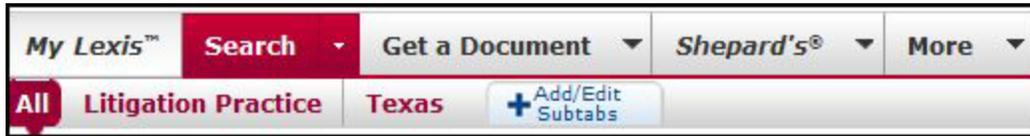
Not as useful. Very broad topics.

Litigation and Transactional Resources

Again, not as useful. More of an effort to get subscribers to buy more services.

Subtabs

A great feature. This allows you to customize your own tabs (actually, subtabs) with quick links to practice areas and, most importantly, jurisdiction. You can add up to 18, but more is not always better.



Now that you know the layout, let's try searching.

Searching by Topic

If you have a topic to research, the best way to search is to click on the **SEARCH** tab.

Follow these instructions.

1. Click on the **Search** tab.
2. Select a database. You can choose what specific courts in which to research, or choose the topic of law to research. It is usually most effective to choose a court database, such as "**State Court Cases, Combined.**"
3. After choosing a database, Lexis will ask you to enter a search query. A query is a collection of words and phrases relevant to your research issue. There are two ways to enter your query: by **Terms and Connectors** or using **Natural Language**.

Terms and Connectors

This allows the researcher to list the terms and phrases, placing connectors between them. The connectors determine the relationship between the words. For instance, if you want the term *suicide* to appear within 50 words of the term *physician*, and for the term *physician* to appear within the same sentence as the term *assisted*, it would appear like this:

suicide w/50 physician w/s assisted

Lexis provides a box on the right hand side of the page that defines the possible connectors you can use. You can even click on one of the connectors and Lexis will place it in your query for you!

Natural Language

You can also research using natural language. In this case, simply provide your search terms separated by commas. Note that if you have any multi-word phrases, you should place them in quotation marks. This way Lexis will only search for the terms together, not individually.

For example:

suicide, homicide, "physician assisted"

Lexis will also provide suggestions for expanding your terms. Just click on the "Suggest Terms for My Search" link on the right side of the Search Terms text box.

4. When you click on the Search button, Lexis will try to find cases relevant to your query.

5. The results page will list summaries of the cases that were found are listed. After the title of the case, Lexis will provide the following:

Case Title and Citation

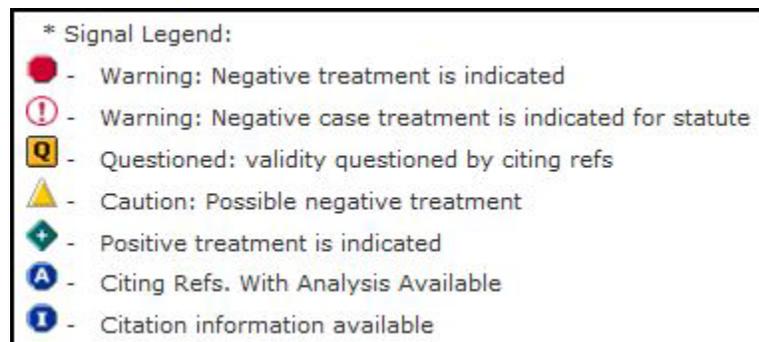
Overview General description of the case

Core Terms: The most relevant terms from that case

Highlighted Terms: Terms from your query are highlighted within the case.

Shepard's References: To the left of the title of the case a symbol will appear. The symbols indicate whether that case is still valid, or whether it has been treated positively or negatively by other cases.

The symbols look like this:



These symbols help you determine whether even looking at a case in the results page is worthwhile. For instance, if a case has a red stop sign shaped symbol (which is a negative treatment), you may want to skip it in favor of other, more positively treated cases.

6. Click on a title to a case. Lexis now provides the entire opinion, along with tools such as” **Procedural Posture:** How the case was affected procedurally.

Case History: Prior or subsequent opinions of the same legal matter

Case Summary: General description of the case

Core Terms: The most relevant terms from that case

Lexis Headnotes: You can use these or hide them.

The Opinion: The actual full court opinion.

Highlighted Terms: Terms from your query are highlighted within the case.

Shepard's References: To the left of the title of the case a symbol will appear. The symbols indicate whether that case is still valid, or whether it has been treated positively or negatively by other cases.

7. If the case looks relevant, you can print it, download it, or even choose to view it in an easier to read format. Simply look for the following toolbar towards the top right of the page:



GET A DOCUMENT TAB

The screenshot shows the Lexis website's 'Get a Document' interface. At the top, there is a navigation bar with 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. Below this, three sub-tabs are visible: 'By Citation' (which is selected and highlighted in red), 'By Party Name', and 'By Docket Number'. A red arrow points to the 'By Citation' sub-tab. Below the sub-tabs, there is a text instruction: 'Click the **Citation Formats** link to locate the correct citation format for any retrievable publication, even if you know only part of its name.' The main content area is divided into two columns. The left column is titled 'Get by Citation' and contains a text input field, a 'Citation Formats' link, and a blue 'Get' button. Below the input field, there is a note: 'To request multiple citations, use *Get & Print* or the new *Shepard's® BriefCheck™*'. The right column is titled 'Related Searches' and contains two links: 'Get by Party Name' and 'Get by Docket Number'. At the bottom of the right column, there is a 'Did you know...' section with text: 'You can retrieve case law decisions as well as Briefs, Motions, and Pleadings through the Get by Party Name and Get by Docket Number tabs.'

If you have a citation, a name of a party, or even a docket number you can quickly find the document using this tab. Notice that the subtabs help you target your search based on what information you have. You will use the Search Tab when you have a topic or issue that needs to be researched, and the Get a Document Tab when you have information and need to locate a specific case, act, or other document. This works with statutes, regulations, and any other type of citation.

You can practice by clicking on the Party Name subtab and typing in the name of a case, such as *Roe v. Wade*, or *Plessy v. Ferguson*. Or search for the citation 410 U.S. 113.

SHEPARD'S TAB

My Lexis™ Search Get a Document Shepard's® More

Shepard's® Table of Authorities Auto-Cite® LEXCITE®

Research or validate citations quickly, easily and reliably.
Shepard's® - now integrated with LexisNexis® Headnotes.

Enter the Citation to be Checked View Tutorial | Help

Citation Formats

The Report will include:

- Shepard's® for Validation - subsequent history and citing references with analysis (KWIC™)
- Shepard's® for Research - prior and subsequent history and all citing references (FULL)

To request multiple citations, use [Get & Print](#) or the new [Shepard's® BriefCheck™](#)

Shepard's is a way to validate authority. It is a critical step in the research process. Once you have located a case, statute, or other form of primary authority, how can you be sure that the authority is still valid? The answer: Shepard's.

Using the Shepard's Tab Main Form

Simply enter the citation in the text field and Shepard's will provide the histories and treatments of the case. As we will discuss below, you will use the symbols to determine if the case you have Shepardized is still valid.

Shepardizing a Search Result or While Reviewing a Document

If you are looking at a document, or if you have a citation you want to Shepardize, click on the **Shepard's** tab. You will most likely only use the **Shepard's** subtab under the main tab, as shown above. If you were looking at a document, Lexis automatically fills in the citation for you. If not, just type in the citation you want to Shepardize. Then click the **Check** button.

The Shepard's results page provides the following:

Shepard's Summary: Informs the researcher at-a-glance as to the kind of treatments and histories found in the results. The researcher should be especially concerned about any **Warning Analysis**. While **Cautionary Analysis** should be paid attention to, those treatments do not necessarily invalidate the case being Shepardized.

Prior History: These are the same case at a different level of litigation. There may be History symbols that affect the validity of the case you are Shepardizing. The key can be found at the bottom of each Shepard's results page.

Citing Decisions: These are cases that have cited the case being Shepardized. There may be Treatments (symbols) provided that help determine the validity of the case being Shepardized. The key to these symbols are always found at the bottom of the page. The key looks like this:

* Signal Legend:

-  - Warning: Negative treatment is indicated
-  - Warning: Negative case treatment is indicated for statute
-  - Questioned: validity questioned by citing refs
-  - Caution: Possible negative treatment
-  - Positive treatment is indicated
-  - Citing Refs. With Analysis Available
-  - Citation information available

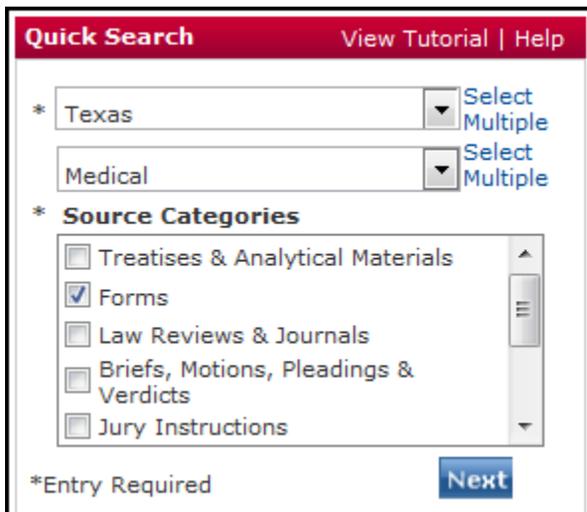
More... Secondary Authority Online

While the majority of research online is for the purpose of locating primary authority, more and more secondary sources have become available on both Lexis and Westlaw, Lexis' main competitor. To find secondary sources, start on the SEARCH tab. On the right side of the page you will see a choice for **Secondary Legal**. You can choose on the sources listed below, or click on "**View more sources.**" Simply navigate through the choices provided. Lexis will then allow you to enter a search query for the source you chose. By going back to the Search tab, you could also choose to research by **Area of Law-By Topic**. If you click on one of the listed links, Lexis will provide both primary and secondary sources relevant to that topic.

Form Books Online

Again, to find form books, start on the SEARCH tab. On the left side of the page you will see a choice for **Secondary Legal**. Underneath you will see the choice for **Matthew Bender**, one of the best publishers of form books. You will be able to choose to search for forms by **Area of Law** or by **Jurisdiction**. You can then enter a search query, or click on the symbol next to a particular topic. This will expand your choices. You need to browse through several form books to get a feel for the power of these tools. There are thousands of forms available on Lexis, if you know how to find them.

You may also want to use the new **Quick Search** box on the right side of the page. It is simple to use. Just choose a database, subject matter, and a source category:



The screenshot shows the 'Quick Search' interface. At the top, there are links for 'View Tutorial | Help'. Below that, there are two dropdown menus: the first is set to 'Texas' and the second to 'Medical', both with 'Select Multiple' links. Underneath is a section titled '* Source Categories' with a list of options: 'Treatises & Analytical Materials', 'Forms' (which is checked), 'Law Reviews & Journals', 'Briefs, Motions, Pleadings & Verdicts', and 'Jury Instructions'. At the bottom left, it says '*Entry Required' and at the bottom right, there is a blue 'Next' button.

Printing

Lexis provides several options for the researcher to choose from in order to save a viewed document. First, find the Print Toolbar at the top right of the page. It looks like this:



Following is an explanation of the options presented:

The symbol on the far left is a tool to set up your printing preferences to make printing more efficient. Just follow the instructions as provided by Lexis.

The [Printer symbol](#) allows you to print the document being viewed.

The [Floppy Disc symbol](#) will give you instructions on downloading, or even easier, just click **File**, and **Save As** on your browser. Title the document and click **OK**. The document you are looking at will be saved. Pretty easy!

The [Mail symbol](#) allows you to email the document. Very cool, and very easy.

The [Phone symbol](#) allows you to actually fax the document right from the computer screen.

The [Page Symbol](#) is a very useful printer friendly tool. It allows you to look only at the text of the document without the extra stuff. Give it a try!

Reminder: Everything costs the subscriber (but not the student). So when you are working as a paralegal in a firm, be careful. Just because you email a document to yourself, for example, it does not mean it's free!