H O W   T O   U S E   L E X I S

Following are some basic instructions 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! Please note that the layout to Lexis is slightly modified from time to time, adding and removing features, but the basic research layout and principles will remain consistent.

GETTING STARTED: SET YOUR PREFERENCES

You can pick and choose how you want Lexis to display or search options and search results. Just click on the Preferences link. Here are some suggestions.

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

Show this tab at the beginning...
The tabs on the top left of the page can change, but you will want to keep this preference on Legal. Lexis also has News and Public Records options, but for a paralegal, the Legal tab is the most useful.

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.

Statute Display
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**.

Screen Shot of the Preferences Dialogue Box

LAYOUT OF LEXIS

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

Here we will provide a general description of each Tab.

SEARCH TAB

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. The researcher can look for databases by jurisdiction or subject matter. Lexis provides many choices.

Looking at the following screen shot, notice that Lexis lists many possible databases from which to begin your search. It may seem intimidating to have so many choices at first, but it shouldn't be. Instead, view these options as Lexis' way of making your job easier.

Most researchers will research within the federal databases within their jurisdiction or within their state jurisdiction, depending on the kind of case being researched.

Once you are online, try several of the different database options, entering your query. Notice the varying results depending on the database. Get comfortable with the layout of the results page.

Of course when researching, you will pay special attention to cases from your jurisdiction.

As we will see later, the Search page is the best way to conduct a general search in Lexis. It will most likely be the starting point for most of your research on Lexis.

Screen Shot of Search Page

Method for Searching by Topic on Lexis

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. On the left side of the page you can choose what specific courts in which to research, or on the right side of the page, choose the topic of law to research. It is usually most effective to choose a court, 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.

    Natural Language
    A researcher can also search 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:

   Overview: General description of the case
   Core Terms: The most relevant terms from that case
   Highlighted Terms: Terms from your query are highlighted within excerpts of 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. We will discuss Shepard's more later.

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.
   Overview: The general facts of the case.
   Outcome: The result of the case.
   Core Terms: Major terms from that case.
   LexisNexis Headnotes: You can use these or hide them.
   The Opinion: The actual full court opinion.

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:

RESEARCH TASKS TAB

Lexis provides a selection of research sources according to A*reas of Law* or *Litigation*.

Areas of Law provides a method of researching by specific subject matter. *Litigation* provides practice-aid research for several specific jurisdictions, but not all.

Screen Shot of Research Tasks Page

SEARCH ADVISOR TAB

A tool that helps the researcher focus the subject matter sources for the topic being researched. It is designed to provide research options for the user.

The researcher can type in a legal topic and press Find, or the researcher can click on one of the subject matter links provided on the page.

After doing one of the two options, the researcher will be asked to enter his or her search query. Lexis will then provide search results that have narrowed to the subject matter in question.

Screen Shot for Search Advisor Page

GET A DOCUMENT TAB

If you already know the name of a case or have a citation of any law, this is the place to go. For best results, type in only the volume, publication, and page number of the citation for which you are searching.

Example: 110 P.2d 392

Lexis even provides help with your citation format.

Screen Shot of Get a Document Page
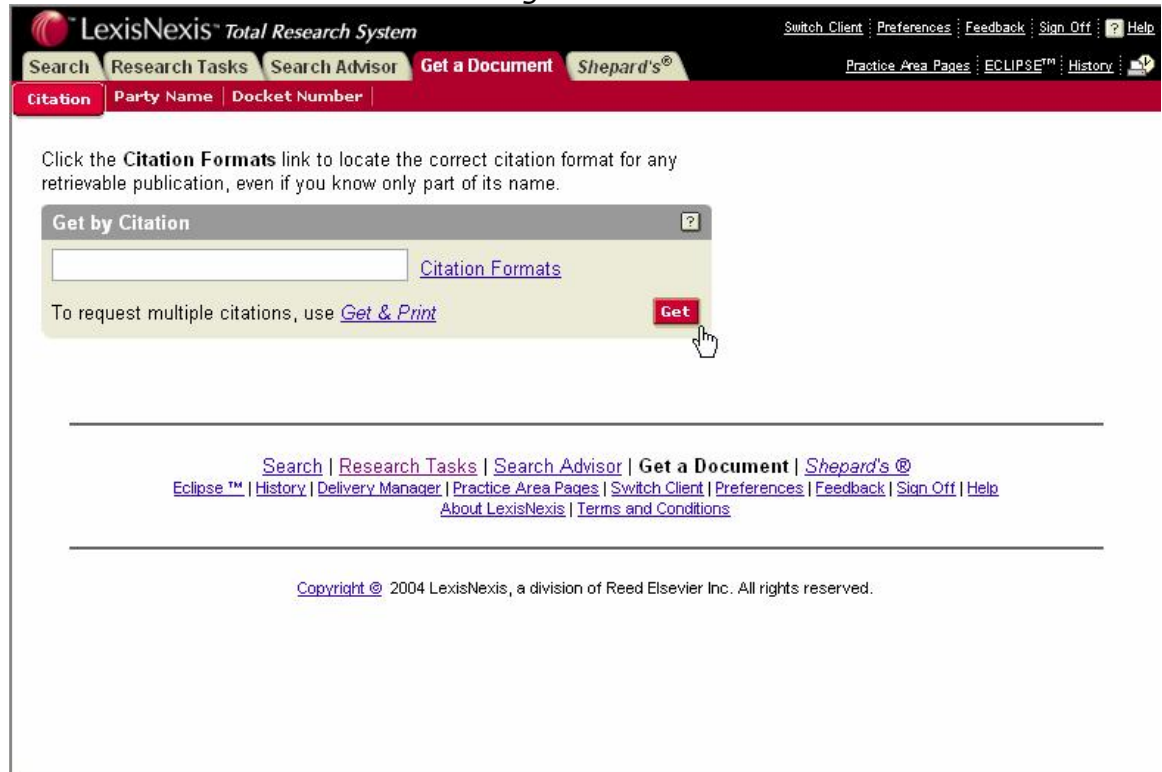
Method for Getting a Document on Lexis
If the researcher already has a citation or case title and simply needs to look it up, the process is fairly simple. Just click on the GET A DOCUMENT tab.

Notice the set of sub-tabs underneath the main tabs. You can find a document in the following manners:

1. Click on the **Citation** sub-tab and type in the citation, then click **get**.
2. Click on the **Party Name** sub-tab to find a case by the title of the opinion.
3. Click on the **Docket Number** sub-tab if you have only the court docket number available. (This is the least used method.)

You can practice by clicking on the Party Name sub-tab and typing in the name of a case, such as *Roe v. Wade*, or *Plessy v. Ferguson*.

SHEPARD'S TAB

Shepard's is a method of validating whether the law you are looking at is still valid. There are many ways to Shepardize within Lexis, but the easiest is by clicking on this Tab.

Once the Shepard's page comes up, simply type in the citation you want to Shepardize. Again, type only the volume, publication, and page number of the citation. Do not include the names, the year, or parallel cites.

Screen Shot of Shepard's Page

Method for Shepardizing on Lexis

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.

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** sub-tab 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 to the symbols 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:

The above tabs are the key to researching within Lexis. Most of your research, however, will likely revolve around the Search page. Following is the step-by-step procedure for researching by subject matter using the Search page, and an explanation of the results page.

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 right 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.

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:

 Print | Download | Fax | Email | Text Only

Following is an explanation of the options presented:

- is a way to set up your printing preferences to make printing more efficient. Just follow the instructions as provided by Lexis.
- Print allows you to print the document being viewed.
- Download will give you instruction 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!
- Fax allows you to actually fax the document right from the computer screen. Cool.
- Email allows you to email the document. Very cool, and very easy.
- Text Only is a very useful tool. It allows you to look only at the text of the document without the extra stuff. Give it a try!

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