

San Diego County Public Law Library

Serving the legal information needs of San Diego County citizens since 1891

www.sdcpll.org (619) 531-3900

Research Guide

Using LexisNexis

Last Updated: September 5, 2007

Last Reviewed: September 5, 2007

Logging in:

Click on the “Legal Research Databases” folder” on any of the patron desktops, then click on the “LexisNexis” icon. In the “First” and “Last” name sections of the log-in page, enter any information into these required fields, then scroll down and click “Accept” to begin searching.

Tabs:

There are six tabs available:

- **Search** – under “Sources” > “Legal” tabs (State and Federal cases, annotated codes, regulations, administrative materials, law reviews & journals and more)
- **Research Tasks** (search for information based on a particular “Area of Law” or “Litigation”)
- **Search Advisor** (“Find a Legal Topic” or “Explore Legal Topics”)
- **Get a Document** (by “Citation,” “Party Name” or “Docket Number” using the tabs within the “Get a Document” section)
- **Shepard’s** (see our Research Guide “Using Shepard’s Online”)
- **Alerts** (allows you to save any search and receive updates about it by clicking the “Save As Alert” link at the top of the page within your search results)
NOTE: there is no guarantee that alerts will be saved once you leave the library

Click on the tabs to find the database you wish to search. If you cannot locate a specific database, you can click on the “Find A Source” tab under the “Search” > “Sources” tabs at the top of the page to either input search terms to locate a particular source or search the alphabetical listing of databases by clicking on the alphabet links. You will only be able to search the databases which are available through our subscription, however, on the library’s computers.

Search Screen:

The main screen under the “Search” > “Sources” > “Legal” tabs provides several searching options to begin your research:

- **Cases – U.S.** (Federal, State and U.S. Supreme Court Cases)
- **Federal Legal – U.S.** (Federal cases, United States Code Annotated, Code of Federal Regulations, Federal Register, Federal Court Rules, Administrative and Legislative materials, etc.)

- **States Legal – U.S.** (individual states information, such as cases, annotated codes, regulations, administrative materials, jury instructions, etc.)
- **Legislation & Politics – U.S. & U.K.** (congressional bills, regulations, administrative codes & registers, etc.)
- **Area of Law – By Topic** (list of various legal topics, such as Corporate, Environment, Immigration, Military, Personal Injury, Real Estate, etc.)
- **Briefs, Motions, Pleadings & Verdicts** (limited access: U.S. Supreme court Briefs; Florida State Supreme Court briefs, California jury instructions, researching expert witnesses)
- **Secondary Legal** (limited access: law reviews & journals; Martindale-Hubbell listings; CA and NY Matthew Bender material; CLE materials, etc.)
- **Legal News** (by area of law: taxation legal news; by jurisdiction: some state legal news, including CA)
- **Reference** (Martindale-Hubbell listings, state legislative directory, USCS Statutes at Large and Popular Names tables)
- **LexisNexis® Information & Training**

Many of these sources also provide additional databases by clicking “View more sources” at the end of the particular section. The “View more sources” tab provides a list of all the available databases within that category, as well as other options for refining your search.

Beginning your search:

- Click on the database you wish to search, for example, “Federal & State Cases, Combined”, and type in at least one search term related to your research topic in the “**Enter Search Terms**” field box
 - To search using the “**Natural Language**” tab, simply type the most important words of your search query, for example, “statute of limitations for murder.”
 - To search using the “**Terms and Connectors**” tab, enter search terms using connector terms like AND, OR and NOT (if you don’t use these terms, the search engine will put “AND” between each word). For further help refer to the “Search Help” section to the right of the red “Search” button.
 - Once you have at least one search term entered in the box, you may click on “Suggest Terms for My Search” to the right of the terms field box and LexisNexis will generate additional, similar terms you may wish to use in your search. Simply click on the suggested terms generated to add them to your search criteria.
 - You can also restrict your search to cases from a specific time period by using the drop-down menu under “Restrict by Date” or entering specific dates (click on “Date Formats” for further help)
- After you have entered your search terms and selected any other criteria, click on the red “**Search**” button to the right of the search box.

Reading the results:







- Results will be displayed 50 per page, with the most relevant case first, based on your search criteria.
- Your **search terms** will be shown in **bold** where they are listed within a document
- Click on a blue document name link to read the entire document.
- Once you choose a document to read, your search terms will be displayed at the top of the screen after “**Terms**”
- You can change your search criteria by clicking on “**Edit Search**,” entering different or additional terms, then clicking on the red “Search” button again.
- Click on the arrows on either side of “**Term __ of __**” at the bottom of the screen to highlight and move through your search terms within the document.
- Click on a **reporter citation** at the top of your chosen document or by using the drop-down menu at the bottom of the page next to “**Page, Select a Reporter**” to highlight that reporter’s page numbers throughout the document for easy citing.
- To view any briefs or other documents available for your chosen document, you can click on “**View Available Briefs and Other documents Related to this Case**” at the beginning of the case if there are documents available.
- Click on the “**FOCUS**” link at the top of the screen to narrow your search results and find documents within your results that contain the additional terms you indicate.
 - Each time you use the Focus feature you further narrow the search results displayed
 - You can limit your Focus search using the same date restrictions, just as you do with your original search terms
 - You may use the Focus feature to search the entire list of documents or just selected documents you specify by checking the box to the left of the document name and then clicking the “FOCUS” icon
- Once you find a document that matches your criteria, you can click on the “**More Like This**” link at the top of your document page to find additional cases similar to the current document selected
 - You will have the option of choosing the database in which to search, the “core Terms” you wish to use, any terms that must be included (“Mandatory Terms”), and to restrict your search by date
- You can also use the “**More Like Selected Text**” search feature to locate other documents that contain similar word patterns and citations.
 - Highlight a section of text that you want more documents to address, then click the “More Like Selected Text” link at the top of the page. For best results, though, limit your selected text to one paragraph at the most.
 - You will have the option of choosing the database in which to search, the “core Terms” you wish to use, any terms that must be included (“Mandatory Terms”), and to restrict your search by date

Evaluating the results of your search:

- LexisNexis provides “Shepard’s Signals,” symbols to assist you when looking at a case indicating how other authorities have treated it.
- These signals appear at the top of the page next to the name of the case

- You can see what the signal means by placing your mouse pointer over the signal and holding it there for a few seconds.
- To see the results of a particular Shepard's Signal, click on the symbol (for further help with Shepardizing, refer to our "Using Shepard's Online" research guide).

For cases, the signals indicate:

- - **Warning:** (red stop sign) Negative treatment is indicated
- - **Questioned:** (orange box with "Q") Validity questioned by citing references
- - **Caution:** (yellow triangle) Possible negative treatment
- - **Positive** treatment is indicated (aqua green diamond with "+")
- - Citing Refs. **with Analysis** Available (blue circle with "A")
- - **Citation information** available (blue circle with "I")

If you click on the Shepard's signal/symbol *or* click on the "Shepardize" link at the top of the page, you will automatically be directed to "Shepard's Citations Service" where you will be able to see details about what has happened to the case.

- You can also click on the "**TOA**" link at the top of the page to generate a Shepard's table of authorities, which gives you the subsequent treatment of each cited reference within the Shepard's report for your case, in order by jurisdiction.

Printing and Emailing documents:

To obtain information from LexisNexis, you have two options:

- 1) Click on the "**Print**" icon in the upper right corner of the screen, *next* to the red "FAST Print" button.
 - a. Once the "Print Documents" dialogue box appears, you may choose how your document will appear when printed by selecting under the "**Document View**" to:
 - i. Include Shepard's Signal, if available
 - ii. Show Case Summary
 - iii. Show LexisNexis Headnotes
 - iv. Show core Terms
 - v. Dual Column Print
 - b. Next choose what the "**Document Range**" will be by selecting:
 - i. Current Document, with or without Selected Pages and Reporter
 - ii. Original Results
 - iii. Selected Documents
 - c. You may also select certain "**Formatting Options**," such as:
 - i. Font Type
 - ii. Search Terms in Bold or Italic Type
 - iii. Search Terms Underlined
 - iv. Embedded Legal cites in Italic Type
 - v. Displayed Pagination in Bold type
 - d. For best results, keep the "**Printer**" option set to "Adobe (PDF) Format for Attached Printer"
 - e. When finished selecting your page view, click on the red "**Print**" button. This will generate an **Adobe PDF** document of the case. Click on the picture of the printer at the upper left of Adobe PDF document screen to print the document, and then follow our print program instructions to process the document through our print station.

- 2) Click on the **“Email”** icon in the upper right corner of the screen.
 - a. Type your email address into the **“To”** box
 - b. Type a **“Subject Line”** and **“Add a brief note”** if you like
 - c. The **“Document View,” “Document Range,”** and **“Formatting Options”** work the same as for printing above
 - d. When emailing, you also have the option to format the emailed document to appear as **“Word (DOC), “WordPerfect (WPD), “Text Only” (TXT), “Adobe” (PDF),** or **“Generic” (RTF)**
 - e. When finished entering your email address and selecting your other options, click on the red **“Send”** button to email the selected document
 - f. When retrieving your email, please be aware that the Lexis material will appear as an attachment, not be visible within the text of the email