Lexis® and Nexis®: Cost-Effective Search Tips
Follow these tips and suggestions to help make your research on the LexisNexis® services more efficient and cost-effective.

1. Sign up for training.
   • Receive free training in person from a specialist in one of our offices across Canada or online via a web-based session. Call us at 1-800-387-0899 or email us at training@lexisnexis.ca for training or assistance.

2. Prepare your research before searching.
   • Since there are no longer any hourly charges, take your time while online to construct search terms, choose sources, and learn about the many features and functionality of the Lexis® and Nexis® services.
   • Check for spelling mistakes with the Check Spelling link before clicking the Search button.
   • Decide which source(s) would be the most cost-effective to search.
   • Notes:
     ○ The Lexis® service (www.lexis.com) is primarily used to search U.S. legal content, and news and business information.
     ○ The Nexis® service (www.nexis.com) is primarily used to search news and business information.
     ○ If searching Canadian legal content, use the LexisNexis® Quicklaw® online legal research service (www.lexisnexis.ca/quicklaw) for the most cost-effective searches.

3. Find individual documents.
   • Use the Get a Document or Shepard’s tab if you know the specific case, law review article, statutory code section, or citator reference. This will result in a lower charge than searching within sources.
   • All options under the Get a Document and Shepard’s tabs are subject to document-retrieval charges.
   • Notes:
     ○ You can search by citation, party name, or docket number under Get a Document.
     ○ If you’re not sure of the proper format for a citation, click Citation Formats.
     ○ Use the Shepard’s tab to note up a U.S. case, law review article, or statutory code section.
     ○ The Quick Tools box has a search box for Get a Doc and Shepardize.
     ○ The service is not case- or punctuation-sensitive.

4. Find sources.
   • At no extra cost, search in Find a Source by entering a keyword, list or phrase, or by browsing the source list alphabetically.
   • Note:
     ○ You can also search the LexisNexis® Directory of Online Sources at http://w3.nexis.com/sources — without having to sign in to Lexis or Nexis.

For Customer Support, please call 1-800-387-0899 or service@lexisnexis.ca.
5. **Select sources carefully.**
   - Smaller or single sources generally cost less per search than larger or group sources.
   - Use the icon to view details of a source.
   - View the Lexis® Price List of sources at www.lexisnexis.ca/en/pdf/LexisPriceList.pdf. To search the list, use CTRL+F on your keyboard.

6. **Use enhanced navigational tools.**
   - When searching in codes, analytical treatises, and other structured materials, you can run a full-text search or click through the table of contents (TOC). The TOC approach has several features to help you review documents and return to the TOC quickly and easily:
     - Search the TOC or the full text of the document.
     - Click the + sign to expand the TOC and the – sign to collapse it.
     - The View drop-down lets you return to the TOC from the text of a document.
     - Jump to a particular TOC level with one of the links that show your hierarchical path.
     - Rest your cursor on a page for more than four seconds, and the citation for the section you’re viewing will display.

7. **Use the Book Browse feature.**
   - Use Book Browse to view preceding and succeeding code sections of a statute title without running a new search request. After viewing the results of your search:
     1. Click Book Browse at the top of the page of a displayed code section.
     2. Click the Next or Previous arrows at the top of the page to navigate forward or backward in documents.
     3. Click Return to Search Results at the top of the page to return to your original code section.

8. **Start with broad searches.**
   - It is less expensive to conduct broad searches and to focus these searches later than to get too few results and have to rerun a search. There is no charge if you receive the More than 3,000 Results message and then click Edit Search, but you are charged for searches resulting in No Documents Found.
   - When searching, use broad search terms, include synonyms and use proximity connectors rather than search an exact phrase (e.g., search terms separated by w/p or w/N will specify terms within the same paragraph or within N words of each other, where N is any number you specify from 1 to 255). For assistance with terms and connectors, view the free help file by clicking the More Connectors & Commands... link below the text box on any search form.
     - Notes:
       - For more search terms, click the Suggest terms for my search link.
       - The w/ is optional in the following connectors: w/N, w/p, w/seg and w/s.

9. **Use the FOCUS™ feature.**
   - FOCUS lets you narrow your search results without changing your original search request by searching for terms not in your original search request — at no additional charge. However, modifying your original search (either via the bread-crumb trail or by modifying your search using the Edit Search link) does constitute another search charge once you click the red Search button again. But going back to your original search results via the bread-crumbs trail (i.e., removing your “focus”) does not cost extra.
   - An Advanced search is also available. After viewing the results of your search:
     1. Click Advanced... to the right of the FOCUS terms box.
     2. Enter desired FOCUS Terms, Restrict by Date, Search Within and Restrict by Document Segment information.
     3. Click the FOCUS button.
     - Note:
       - There is no added charge to view or sort results.

10. **Use LexisNexis® Case Summaries, LexisNexis® Headnotes, and “More Like” Tools.**
    - LexisNexis Case Summaries, available exclusively in LexisNexis case law documents, consist of Procedural Posture, Overview and Outcome sections. These concise, targeted synopses of cases, written by our trained case law editors, provide you with a snapshot of a case law decision, a valuable timesaver as you originally assess cases.
• LexisNexis Headnotes are the key legal points of a case drawn directly from the language of the court and selected by a team of LexisNexis® legal editors. Link to relevant text within your case or to other relevant documents with the same headnote. Because headnotes are numbered, you can easily review the main points of a case — online or offline. You can also Search by Topic or Headnote for a more in-depth search on your topic (see tip 12).
  ○ More Like This Headnote allows you to focus on the terms of art or keywords in a particular headnote. It uses those terms and keywords to find more cases with similar headnotes or with closely matching language in the opinions. After viewing the results of your search:
    1. Click the More Like This Headnote link at the end of a headnote (HN).
    2. Specify appropriate information for Jurisdiction and Date.
    3. Click Search.

• More Like Selected Text is a convenient research tool that allows you to create a search on your own “casenote.” Simply highlight a portion of relevant text and then click the More Like Selected Text link at the top of your document. When you submit a More Like Selected Text search, the LexisNexis® research services first analyze your selected text, looking for key terms and important legal citations, and then retrieve other documents that contain similar patterns of words and citations.
  ○ Notes:
    ▪ For best results, limit your selected text to no more than one paragraph. Also, try to focus on a single subject or issue, and be sure to highlight any case law citations that appear in connection with the issue.
    ▪ This feature is available only if you are using an advanced browser.
    ▪ This feature is not available with documents found through the Shepard’s® Citations Service.

11. Use document options.
• Once you are in a result, click the Outline tab to quickly jump to specific portions of the document.
• Use Select a Reporter and enter the respective page number to jump to a specific page of the document.

12. Search by Topic or Headnote.
• Use Search by Topic or Headnote under the Search tab to easily access on-point results for your topic and ensure that you are searching across only relevant sources: expert analysis from Matthew Bender® content, as well as cases, codes, law reviews and more.
  ○ A simplified interface allows you to choose single or multiple jurisdictions, multiple sources, and further search terms to narrow your topic.
  ○ Clearly defined result sets appear by content type, so you can choose the sources you want to explore further.
  ○ Note:
    ▪ Searching by this method sometimes results in searching multiple sources at once. Therefore, the transactional rate may increase as more sources are searched together.

13. Create your own source selection subtabs.
• Create additional source selection tabs that contain sources specific to an area of law or jurisdiction in which you research frequently (Legal and News & Business are default subtabs):
  1. Click +Add/Edit Subtabs at the top of the Search page.
  2. Select items from the General Search, Search, Practice Areas and/or Jurisdiction sections.
  3. Click Next.
  4. Customize subtabs using the Move Up and Move Down buttons to specify the order in which subtabs should appear.
  5. Click Set.
  ○ Note:
    ▪ Use the Recently Used Sources drop-down to view the last 20 sources you previously used.

14. Shepardize® (note up).
• Noting up a case, law review article, or statutory code section using the Shepardize button in the Quick Tools box is subject to a document-retrieval charge.
• Noting up a case, law review article, or statutory code section from a link in another document is subject to a document-retrieval charge and is charged as a premium source.
• Searching for the Shepard’s record for a case, law review article, or statutory code section from a search form (Shepard’s tab) is run as a search.
15. Use History and Alerts.

- **History**
  - Your searches and search results are saved automatically in the History log for 24 hours. Searches (but not results) will be saved for an additional 29 days. Retrieve results of a previous search for 24 hours at no additional charge.
  - If you run anything from the Recent Results tab (results from the last 24 hours) in your History, there is no charge.
  - If you run anything from the Archived Activity tab in your History, you are charged the cost of the original search again.

- **Alerts**
  - There is a cost each time an alert runs, regardless of whether the alert retrieves documents. The cost depends on how frequently the alert runs*.
    - Monthly: $40
    - Weekly: $30
    - Business days only: $25
    - Daily: $20
    - Intradaily or hourly: $4.71 (Nexis only)
  - **Notes**:
    - There is a per-document charge for each email address the alert is sent to.
    - Print rates are based on the Results format chosen. Selecting a List View or Expanded List is considered as one document. Selecting any other format is subject to an individual document charge.


- **Use Get & Print** to retrieve multiple documents using their citations or to retrieve multiple Shepard’s Citations Service reports.
  1. Click Get a Document.
  2. Click the Get & Print link under the search box.
  3. Enter citations, separating them by a hard return or semicolon.
  4. Enter information for Select Report Services, Page Options, Formatting Options and Delivery Method.

For Customer Support, please call 1-800-387-0899 or service@lexisnexis.ca.

*All prices are in Canadian dollars and are subject to change without notice.

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