

CourtLink®

Quick Guide



A complete, quick reference guide to using
LexisNexis® CourtLink® features and functionalities



Alert

Stay on top of any new litigation involving your clients, and find out when an opposing party is involved in litigation by setting up an alert on litigant, attorney or subject matter to receive automatic email notification of newly filed cases.

To set up an Alert:

1. Click on the **Alert** tab from the CourtLink top navigation menu.
2. Click the red **Set New Alert** button.
3. Select an Alert type from the list provided.

To set up one of the following Alert types:

- **Federal Subject Matter**
- **State Subject Matter**
- **Class Action**
- **Bankruptcy Chapter**
- **Patent Number/Class***

1. Select the appropriate Alert type from the list provided.
2. From the drop-down menus, select a **court system** and **court type**.
3. From the Online Court box, highlight the court(s) that you wish to search or click **Select All** to select all displayed courts. Then, click **Add Courts**. Notice that the selected courts are removed from the Online Court box and now appear in the Selected Combined Court area. Click **Next**.
4. If you wish to specify subject matters for each court in your Alert set-up, select **Subject Matters** next to each court displayed. Or, if you want to set up all subject matters in every court, click **Next**.
5. Enter a **name** for your Alert and enter a client matter code (optional). To save this Alert, select **Set New Alert**.

*Steps for setting up Patent Number/Class Alerts vary slightly.

To set up one of the following Alert types:

- **Litigant**
- **Attorney/Firm**
- **Judge**
- **Bankruptcy Debtor**
- **Bankruptcy Creditor**

1. Select the appropriate Alert type from the list provided.
2. Enter name(s) in the spaces provided. In the adjacent field, enter any alternative spellings for each name. For example, National Football League can also be referred to as NFL. — OR — As an alternative, you can select the **Upload a File with Party Names for Batch Alerts** radio button. Follow the on-screen directions for providing necessary information.
3. Choose from one of the following three options:
 - All available Courts and Subject Matters
 - Choose specific Courts and Subject Matters
 - Use Default Courts and Subject Matters
 The Criteria Summary screen will appear if you choose all available courts and subject matters or use default courts and subject matters. If you choose specific courts and subject matters, follow steps 2 and 3 from the left-hand column.
4. Click **Next**. The Criteria Summary screen will appear. The **name** of your Alert will appear and you may enter a client matter code (optional). To save this Alert, select **Set New Alert**.

To view Alert Activity:

You can access your Alerts using one of the following methods:

- Option 1:** When cases meet your Alert criteria, you will automatically receive email notification. Simply click on the link in your email.
- Option 2:** New Alert results will be listed on the **My CourtLink** page, under the heading "Today's Alerts." Or, click the **Alert** tab and view the results displayed on the Results tab. Click on the Alert name to view results.

To manage your Alerts:

1. Click the **Alert** tab from the CourtLink top navigation menu.
2. Click the **Manage Alerts** tab.
3. Click an **Alert name** to edit the Alert OR click the **checkboxes** to designate those you wish to delete.
4. Click the **Remove Selected** button to delete selected items.



Search

CourtLink offers superior search capabilities to find relevant past and present litigation activity.

- **Search:** Search by various criteria including attorney or law firm, judge, litigant, nature of suit, keyword, etc., to locate dockets and documents of interest. Combine federal and state courts for a more comprehensive search.
- **Docket Number:** Search by docket number
- **Patent Search:** Search by patent number or by court for patent-related cases.
- **Document Finder:** CourtLink exclusive! Search for the documents listed within the dockets that meet certain criteria for federal courts. Document Finder allows you to pinpoint the relevant work product of opposing counsel, as well as key ruling information on the presiding judge.

Search

1. Click the **Search** tab. Then, click the red **Search** button.
2. Select the court(s) to be searched. Click **Next**.
3. Enter your **search criteria** in the fields provided. Click **Next**.
4. In the Search Summary screen, review your search criteria. Enter your client matter number or project notes (optional) and review pricing details.
5. To confirm your request, click **Run Search**.

Docket Number

1. Click the **Search** tab. Then, click the red **Docket Number** button.
2. From the drop-down menus, select the **Court System** you want to search.
 - Under **Court System**, choose federal courts or a single state court system.
 - Under **Court Type**, select a specific court.
 - Under **Online Court** or **Runner Court**, select a specific jurisdiction.

3. Enter the **docket number**. (Click the Formatting Rules link for details on docket number formats.) Enter a client matter code (optional). Click **Next**.
4. If you have selected a Runner Court, you will need to select a **delivery method**.
5. Review your **Search Summary**. To complete your search, click **Submit Search**.

Document Finder

1. Click the **Search** tab. Then, click the red **Document Finder** button.
2. Click on the Court and Nature of Suit links to select up to 5 different courts and natures of suits for your search, and select a document type from the drop-down menu.
3. Review your **Search Summary**. To complete your search, click **Submit Search**.

Patent Search

1. Click the **Search** tab. Then, click the red **Patent Search** button.
2. Enter a **patent number** to find cases related to that patent OR enter a class/subclass to find cases related to that class or subclass OR select a **U.S. District Court** to display the patent cases from that court. Enter a client matter code (optional). Click **Next**.
3. Review your **Search Summary**. To submit your request, click **Submit Search**.

To view Search results:

New Search results will be listed on the **My CourtLink** page, under the heading "Recent Searches." Click on a search name to view the results for that search. You may also view Search results from search history within Search.



Track

CourtLink Track provides automatic email notification of new activity in existing cases of interest to you so that you can stay on top of new activity in your firm's own cases and keep abreast of events in other cases that may impact your practice areas or your clients.

NEW! Now you can receive track notifications throughout the day to better manage and stay current on case filings and provide superior customer service to all of your clients.

To set up a Track:

1. Click the **Track** tab from the CourtLink top navigation menu.
2. Click the **Track a Docket** button.
3. From the drop-down menus, select the **Court System** you want to search.
 - Under **Court System**, choose federal courts or a single state court system.
 - Under **Court Type**, select a specific court.
 - Under **Online Court**, select a specific jurisdiction.
4. Enter the **docket number**. (Click the **Formatting Rules** link for details on docket number formats.)
5. Under **Scheduling Options** select a frequency for notification of new activity: daily (or up to 3 times per day), selected weekdays, selected dates of a month, or only one time on a single date.
6. Enter a client matter code (optional).
7. Click the **Save Track** button.

To view Track results:

You can access your Track results using one of the following methods:

Option 1: When cases meet your Track criteria, you will automatically receive email notification. Simply click on the link in your email.

Option 2: New Track results will be listed on the **My CourtLink** page, under the heading "Tracked Dockets." Or, click the **Track** tab from the CourtLink top navigation menu. A list of your tracks will appear. Click on the case name to view results.

To manage Track activity:

1. Click the **Track** tab from the CourtLink top navigation menu.
2. Click the **Manage Tracks** tab.
3. Click the **Case Name** to edit the Track OR click the **checkboxes** to designate those you wish to delete.
4. Click the **Remove Selected** button to delete the selected items.



Strategic Profiles

Uncover the litigation history of an opposing party, attorney or law firm and/or the judge assigned to a case to develop compelling case strategies.

- **Judicial Strategic Profiles:** Understand whether the judge assigned to your case has substantial or limited experience in a particular area of law, and learn how the judge handled similar cases. Uncover the experience of your opposing counsel before the judge in particular matters.
- **Attorney Strategic Profiles:** Gain insight into an opposing counsel's practice area experience and number of published decisions, learn whether the attorney has argued similar cases before a specific judge and see prior strategies employed, including case resolution.
- **Litigant Strategic Profiles:** Research the litigation history of your client or the opposing litigant to uncover participation in prior similar cases and discern patterns of case resolution.

To create a new profile:

1. Click the **Strategic Profile** tab from the CourtLink top navigation menu. A **history** of previous Strategic Profiles is displayed automatically.
2. Select a **profile type** by clicking on one of the five tabs next to History, e.g., Litigant.
3. Select the Courts and Nature of Suits to be included in your profile by clicking on the **Select Courts** and the **Select Nature of Suit** links at the top of the page.
4. Enter your **profile criteria**, including name(s), dates, client matter code (optional), chart type and reporting selections.
5. To submit the profile, click **Create Profile**.



Dockets & Documents

Obtain a history of all of the dockets and online documents that have been viewed as well as check the status of your document retrieval orders.

Online Arrived and Online Pending

View a list of all the dockets and online documents that you have viewed as well as those that you have requested or updated from CourtLink. To review the status of an online docket or document:

1. Click the **Dockets & Documents** tab from the CourtLink top navigation menu.
2. Click the **Online Arrived** tab to display the history of your docket and online documents for the past seven days.

— Or —

Click the **Online Pending** tab to display the status of dockets and online documents that have not yet arrived. Upon completion, this material is automatically delivered to Online Arrived.

Runner Arrived and Pending

View the status and billing details for the orders you have placed through the CourtLink Document Retrieval Service. To review the status of a runner document from the CourtLink Document Retrieval Service:

1. Click the **Dockets & Documents** tab from the CourtLink top navigation menu.
2. Click the **Runner Arrived** tab to display your completed document retrieval order as well as billing details.

— Or —

Click the **Runner Pending** tab to display the status of your document retrieval runner requests. Upon completion, this material is automatically delivered to Runner Arrived. If the documents you need are not available online, you can order dockets and documents through the CourtLink Document Retrieval Service. Place your order online or call 866.540.8818.



Document Retrieval

Order dockets and documents from all federal and state courts through the CourtLink Document Retrieval Service.

To place an order online for documents from the CourtLink® Document Retrieval Service:

1. Click the **Order Documents** link at the top of any CourtLink screen.
2. Enter your order details (Court System, Court Type, etc.) and delivery method, then click **Next**.
3. An order confirmation page will appear. Once you have confirmed the details, click the **Send Order** button.

Go to the **Dockets & Documents** tab, and then click on **Runner Arrived** and/or **Runner Pending** to check on the status.

To log on to CourtLink go to: courtlink.lexisnexus.com

If you have any questions about your account or using CourtLink services, please contact one of our knowledgeable Customer Support representatives at **888.311.1966**, or visit the CourtLink Learning Center at courtlinklearning.lexisnexus.com

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