

# CourtLink®

## Quick Guide



A complete, quick-reference guide to using  
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 nature of suit to receive automatic email notification of newly filed cases.

### To set up an Alert:

1. Select 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 District Natures of Suit**
- **Federal Appellate**
- **State Court Natures of Suit**
- **Patent Number/Class\***
- **Class Action**
- **Bankruptcy Chapter**

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 Court(s)**. Notice that the selected courts now appear in the Courts To Be Searched box below. Click **Next**.
4. Select all or specific Litigation Areas to be included by selecting or de-selecting the appropriate check boxes. Click **Next**.
5. Enter a name for your Alert and enter your Client Matter Code (optional). To activate this Alert, click on the **Set New Alert** button.

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

### Other Alert options:

Now you can share your CourtLink Alert results with anyone you want, regardless of whether or not they have a CourtLink ID. When setting up a new Alert, click on the **Share This Alert** button, or in the Manage My Alerts tab, click on the **Share This Alert** link to select additional recipients.

New Alert results are available throughout the day in some court jurisdictions. Intra-day Alerts are now available in select courts where records are updated in real time. Look for the option to receive multiple updates each day when setting up your Alert preferences.

### To set up one of the following Alert types:

- **Litigant**
- **Attorney/Firm**
- **Judge**
- **Criminal Defendant**
- **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. 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. Select from one of the following three options:
  - Use All available Courts and Natures of Suit
  - Choose specific Courts and Natures of Suit
  - Use My Default Courts and Natures of SuitIf you choose to select specific courts and natures of suit, follow steps 2 and 3 from the left-hand column. By default, all available courts and natures of suit are initially selected and will be used if you do not choose another option. Click **Next**.
4. On the Criteria Summary screen, the name of your Alert will appear and you may enter your Client Matter Code (optional). To save this Alert, click on the **Set New Alert** button.

### 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, select the **Alert** tab and view the results displayed on the **Results** tab. Click on the **Alert** name to view results.
- Option 3:** Have new dockets automatically sent to your email by selecting the Automatic Docket Email box in the preferences section. This allows you to view and email dockets without having to log in to CourtLink.

### To manage your Alerts:

1. Select the **Alert** tab from the CourtLink top navigation menu.
2. Select the **Manage My 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.

**NEW!**

### Single Search

Enter keywords into the text box at the top of every CourtLink page to run broad, all-inclusive searches of selected dockets and documents.

1. Enter one or more keywords into the CourtLink Single Search box in the upper left-hand corner of any CourtLink page. Click **Search**.
2. Enter your Client Matter Code (optional). Click **Submit Search**.
3. Results from your search will appear in two tabs, one for dockets and one for documents. You can view these dockets and documents at no additional charge by checking the box or clicking on the blue link. To refine your search results, click on the various categories to the left of the dockets and documents results tabs (e.g., Case Status, Case Type, Litigation Area, State or Court system).

### 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.

1. Select the **Search** tab. Then, click the red **Search** button.
2. Select the court(s) to be searched by clicking in the boxes next to the court names. To see all of the courts available in a particular state, expand the list by clicking on the plus sign next to the state name. 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 Code or project notes (optional) and review pricing details.
5. To confirm your request, click **Run Search**.

### Docket Number

Search by docket number.

1. Select 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 your 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**.

**COURTLINK EXCLUSIVE!**

### Patent Search

Search by patent number or by court name for patent-related cases.

1. Select 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 U.S. Class or Subclass or select a District Court to display the patent cases from that court. Enter your Client Matter Code (optional). Click **Next**.
3. Review your Search Summary. To submit your request, click **Submit Search**.

### 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.

1. Select the **Search** tab. Then, click the red **Document Search** button.
2. Select **Document Finder** by clicking the radio button. Click **Next**.
3. Click the **Select Court** and **Select Natures of Suit** links to select up to five courts and natures of suit for your search and click the **Save Changes** button. Select a document type from the drop-down menu.
4. Click **Next** to review your Search Summary. To complete your search, click **Submit Search**.

### Document Text Search

Search the full text of millions of documents from selected state and federal court litigation across the United States. Document Text Search allows you to uncover documents that meet your specific criteria.

1. Select the **Search** tab. Then, click on the red **Document Search** button.
2. Select Document Text Search by clicking the radio button. Click **Next**.
3. Enter your Keyword(s), the State, Court name, CourtLink Litigation Area and date filed information in the fields provided. Select a Document Type to search. Click **Next**.
4. 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.

### To set up a Track:

1. Select the **Track** tab from the CourtLink top navigation menu.
2. Click the red **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 three times per day), selected weekdays, selected dates of a month or only one time on a single date.
6. Enter your Client Matter Code (optional).
7. Click the red **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 select the **Track** tab from the CourtLink top navigation menu. A list of your tracks will appear. Click on the case name to view results.

**Option 3:** Have tracked dockets automatically sent to your email by selecting the Automatic Docket Email box in the preferences section. This allows you to view and email dockets without having to log on to CourtLink.

### To manage Track activity:

1. Select the **Track** tab from the CourtLink top navigation menu.
2. Select the **Manage My 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.

### More Track Options:

Now you can share your CourtLink Track results with anyone you want, regardless of whether or not they have a CourtLink ID. When setting up a new Track, click on the **Share This Track** button, or in the Manage My Tracks tab, click on the Share This Track link to select additional recipients.

You can also 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.

## Strategic Profiles

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

**NEW!**

The judgment data for over 100,000 Federal District Civil court cases has been integrated into CourtLink Strategic Profiles, making it fast and easy to view and use a collection of judgment information.

- **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. Select the **Strategic Profiles** tab from the CourtLink top navigation menu. A history of previous Strategic Profiles is displayed automatically.
2. Select a profile type by selecting one of the five tabs next to History, e.g., Litigant.
3. Select the Courts and Natures of Suit to be included in your profile by clicking on the **Select Courts** and the **Select Natures of Suit** links at the top of the page.
4. Enter your profile criteria, including Name(s) of Party, date range, Client Matter Code (optional), Chart Type and Reporting Selections.
5. To submit the profile, click the red **Create Profile** button.



## 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 (runner) 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. Select the **Dockets & Documents** tab from the CourtLink top navigation menu.
2. Select the **Online Arrived** tab to display the history of your docket and online documents for the past seven days or select 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 Orders

The CourtLink Document Retrieval Service fulfills your requests for searches or documents not available online by physically sending a runner to the court or records location. The status of all runner orders are updated in real time on the Runner Order page, so you can always check the status of an order. If you have any questions, please call the Document Retrieval Service team at 1-866-540-8818.

### Search Assurance Arrived and Search Assurance Pending

If a search cannot be completed at the time that it is entered, due to a downed court connection, our Court Research Analysts will complete the Search for you as soon as possible. The status of these Search Assurance requests can be tracked on this page.

### Email History

View all email orders that you have placed in the last 30 days on the Email History page. In addition to viewing all your current and completed orders, you can also download completed email files on this page.

## For other litigation tools and resources,

we invite you to visit LexisNexis®

Total Litigator. LexisNexis Total Litigator provides seamless, single-point access to the complete portfolio of LexisNexis® litigation resources. With critical tools, content and services mapped directly to your workflow—case assessment and investigation, drafting and filing, discovery, research and trial preparation—LexisNexis Total Litigator has everything you need to efficiently and effectively manage cases through each step of the litigation process.

**Log on today:**

<https://litigator.lexisnexis.com>

**If you have any questions** about your account or using CourtLink services, please try one of three options:

1. Contact one of our knowledgeable Customer Support representatives at **888.311.1966**
2. Visit the CourtLink Learning Center at **[courtlinklearning.lexisnexis.com](http://courtlinklearning.lexisnexis.com)**
3. Contact the CourtLink Document Retrieval Service team for all of your runner order needs at **866.540.8818**

To log on to CourtLink go to: **[courtlink.lexisnexis.com](http://courtlink.lexisnexis.com)**

