Lexis Advance®
Reference Guide For Corporations

This guide shows you where to find—and how to use—common Lexis Advance® features. Keep this guide handy for reference.

Out of the office? Need the facts? You can gain access to Lexis Advance with current smartphones, tablets and laptops at www.lexisadvance.com. Lexis Advance screens adapt automatically.

Download other Lexis Advance how-to literature, videos, tips and more!

The Lexis Advance Support Site can also help you with sign-in and keep you updated on new Lexis Advance enhancements.

Please note: All screens shown may change slightly as new sources, features and enhancements are added.

Sign in: www.lexisadvance.com | Learn more: www.lexisnexis.com/advancesupport

LexisNexis®
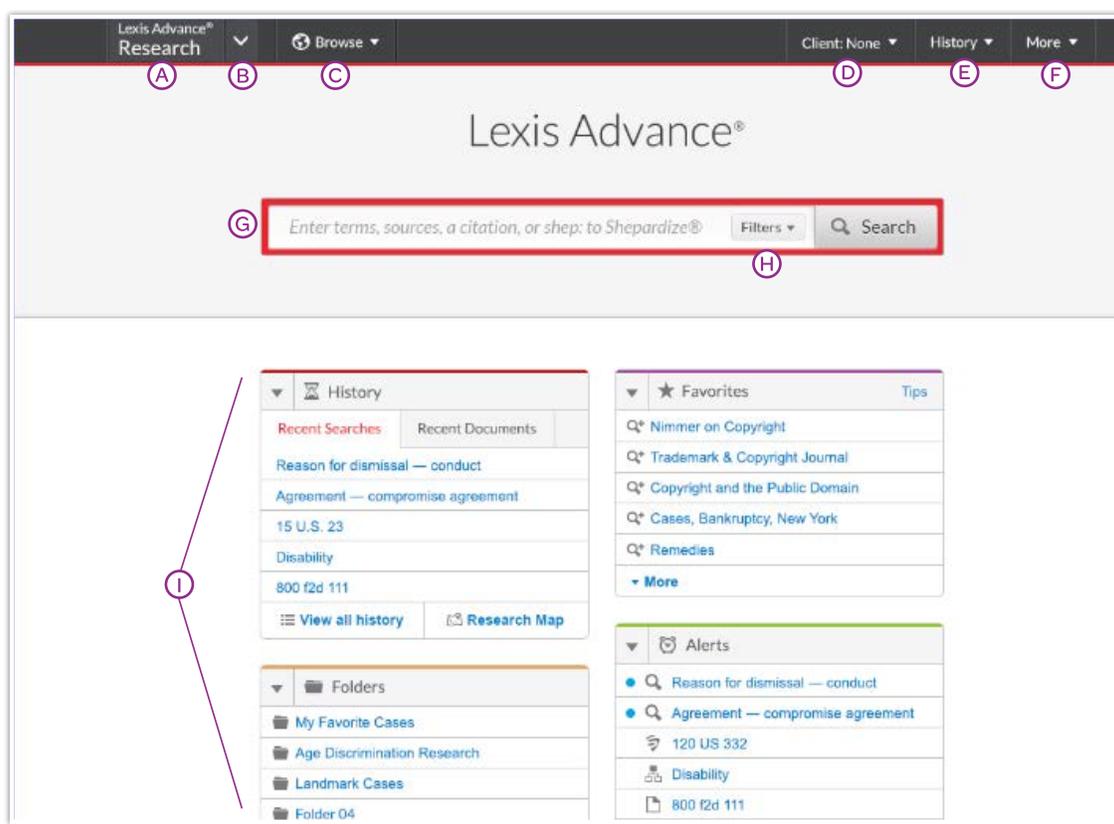
When you sign in to Lexis Advance, the home page displays.

(A) **Return to this home page.** Click the **Lexis Advance logo** on any screen.

(B) **Access other subscription products.** Click the down arrow for access to your other subscription products, such as LexisNexis® Public Records.

(C) **Browse sources or legal topics.** Click **Browse**. Select **Sources** or **Legal Topics**. Drill through the hierarchy or search for specific sources or topics.

(D) **Change/edit client** matter IDs.

(E) **Return to recent searches** or documents retrieved. Also connect via the History pod below the red search box.

(F) **Link to Settings**, Help, Price Guide, *My Lexis*™, Sign Out, etc. Also gain access to Folders, Alerts and Notifications. Or use the landing page pods shown on this page.

(G) **Enter your search words, find sources and more!** Enter a:
  - **natural language search** and click **Search**. No source selection necessary.
  - **terms and connector** search, e.g., *americans disabilities /20 alcohol!* and click **Search**
  - **citation**, e.g., *800 f2d 111* and click **Search** to retrieve the full-text document as well as search results for that citation

  - **partial or full source title**, e.g., *Collier*, to find a source title to add to your search. Or retrieve the source's documents.
  - **popular case name**, e.g., *roe v. wade,* and click **Search** to retrieve the full-text document as well as search results for that case
  - **popular statute name**, e.g., *Georgia Lemon Law*, and click **Search** to retrieve the full-text document as well as search results for that statute
  - *Shepard's*® **request**, e.g., *shep: 800 f2d 111*, and click **Search**

  As you type, the red search box offers suggested legal phrases, documents or sources.

(H) **Refine your search upfront and filter** by content, jurisdiction or practice area—or get help with terms & connectors. **Click filters to re-use recent sources, filters or topics.** You can also filter your **search results**.

(I) **Get there quicker!** Get fast access to favorite sources, Folders, Alerts and legal topic update notifications (A blue dot means that item has new information). Also get access to **Help topics**.

FILTER YOUR RESULTS: SAVE BROWSING TIME
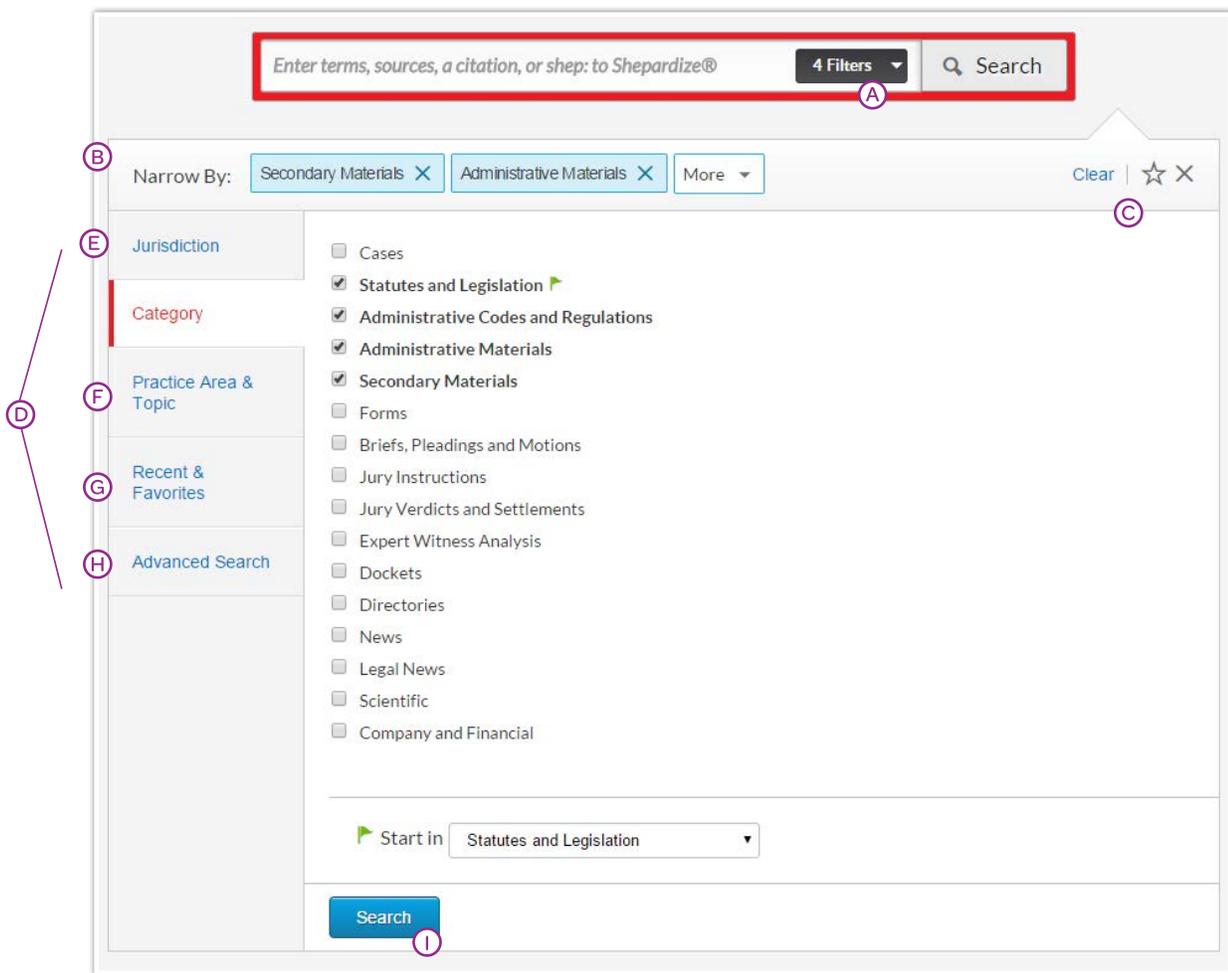
You can filter your **search results** to limit the number of documents. But you can also save **time up front and filter before you search**, choosing jurisdictions, content categories and/or practice areas. Add **favorite sources, source combinations, recently used filter combinations or frequently used legal topics** to your search. Finally you can get assistance developing a **terms & connectors** search.

(A) **Click the Filters** pull-down menu to add filters. As you add, the filters box displays the number of filters you've selected.

(B) **As you add filters** across screens, the **Narrow By** box displays your filter choices. Click the **X** to delete a choice or **Clear** to remove all choices.

(C) **Finished selecting filters?** You can **save the combination** as a favorite and re-use. Click the **star** to add it to your **Favorites** list.

(D) **Navigate filter choices.** Just select a Filter link.

(E) **Jurisdiction** includes Federal, State, by Court and Circuit options.

(F) **Practice Area & Topic** options include more than 40 practice areas.

(G) **Recent & Favorites** options include up to 50 recent and favorite sources/source combinations, recent and favorite filter combinations, and recent and favorite legal topics selected from **Browse Topics**.

(H) **Advanced Search** helps you select search commands. Also link to **citation formats** for retrieving full-text documents.

(I) **Click Search** to close the Filter box when you've finished selecting filters.

BROWSE SOURCES: FIND THE SOURCES YOU NEED

You don't need to select sources before you search at Lexis Advance. But if you want to search specific sources, you can find them two ways.

1. If you know the source name or partial name, enter it in the red search box.

(A) Select a source title to add it to your search.

(B) Select a source's **Table of Contents (TOC)** link to browse the TOC, search the full TOC or **select specific parts of the TOC** to search and/or deliver.

(C) Select a source's **Get Documents** link to retrieve all available documents for that source. Then you can set a **Publication Alert** to get source updates.
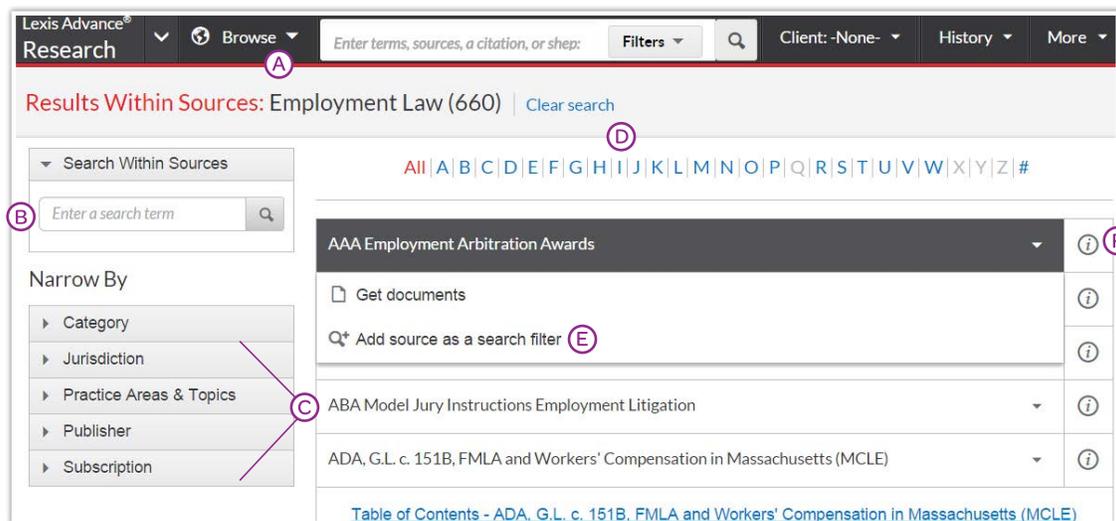
2. You can also search or browse source listings:

(A) Click **Browse** then select **Sources.** Browse by jurisdiction, content category, practice area and more. Or click **All Sources** to search and browse alphabetically by title.

(B) **Enter a title or partial title.** Suggestions are provided as you type. Click the gray magnifying glass to search.

(C) **Filter sources** by content categories, jurisdictions, etc. Find what you need more quickly by selecting filters, e.g., News, then California.

(D) **Browse sources alphabetically.** Use this bar first to select a letter. Then add content and jurisdiction filters.

(E) **Click a source link** and you can:
 – add the source to your search
 – retrieve all available documents for that source

(F) **Click the information** (i) icon to display the source description with details on content, coverage and update schedule.

BROWSE TOPICS: SEARCH BY LEGAL TOPIC
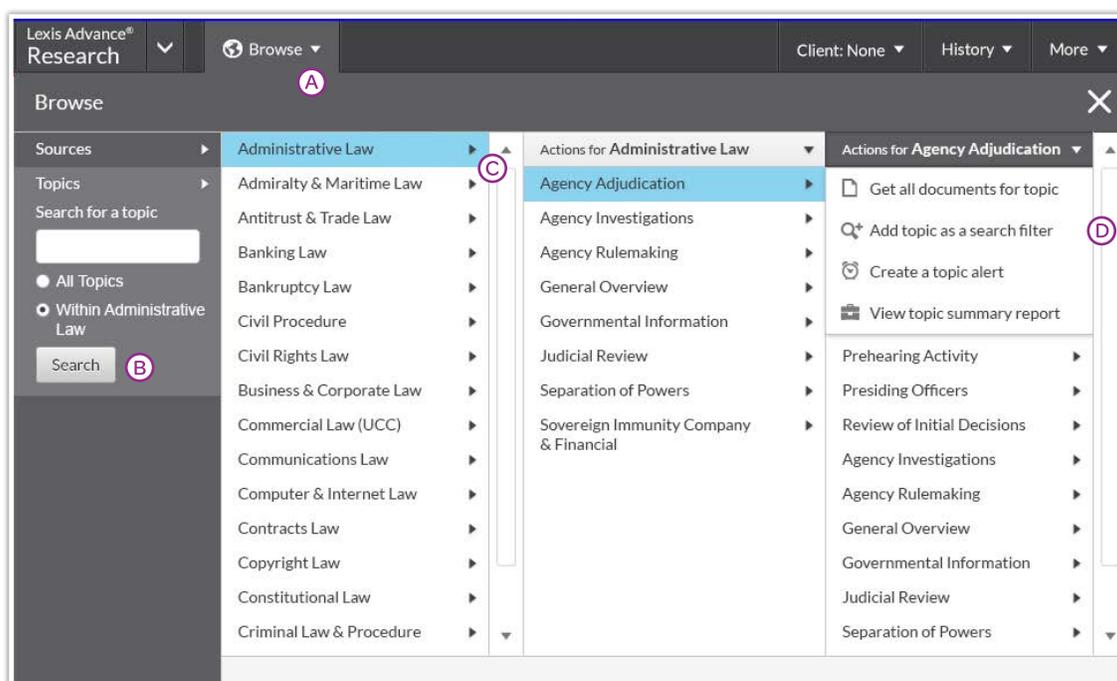
If you prefer to find a legal topic to begin your research, start in Browse Topics. You can also enter the Lexis Advance legal topic hierarchy by **selecting a relevant headnote** in a case you are viewing.

(A) **Search for specific topics** or browse through the Lexis Advance legal topic hierarchy. Click **Browse** then select **Topics**.

(B) **You can search for specific topics.** Enter your search words and click **Search**.

(C) **Or browse levels of the legal topic hierarchy.** Click a **Practice Area** link. Select a topic or use the arrows to open or close additional levels.

(D) **Use your topic in your research!** Once you choose a topic, you can:

– View Lexis Advance search results on this topic, i.e., relevant cases, legislation, news, dockets, etc.

– Add it to a search (and add your own search words)

– Create an Alert on the topic. Your topic Alert will be added to your landing page Alerts pod

– Some topics give you access to Topic Summary Reports, which offer seminal cases and statutes, secondary sources, details on burden of proof, etc.

Legal topics added to your search will be saved in your **Recent & Favorites** list. To make it a Favorite—and add it to your Favorites pod—click the star next to the topic in the Recent & Favorites list.

SEARCH RESULTS: FIND RELEVANT DOCUMENTS FAST

You have many options for refining and using your search results from this screen:

(A) Set up an Alert for your search—across content types, if you choose. Click the **alarm clock** icon next to your search. Your options screens let you choose content types, **edit search terms** and even **select the delivery time** of your updates.

(B) Select **Actions** to add a search to a Folder or expand your search.

(C) See the top relevant results for each content category. Click **Snapshot**.

(D) Save to a Folder. Check the box next to the document title then click **Add to Folder**. Select a **Folder**. When that document appears in future results, it displays the **Saved to Folder** icon. Click the icon for quick Folder access.

(E) Print, download or email without opening documents. Check the box next to document titles you need, then click the appropriate icon. Click **More** to create a printable page of your results.

(F) Sort documents. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc.

(G) Keep track of documents viewed. The **glasses icon** marks documents you viewed over the last 30 days. Hover over the icon to see the last viewed date.

(H) Determine relevance. See your search terms in context to help determine which documents are on point.

(I) Return to prior research tasks. Click **History** and select a prior search or document.

(J) Refine your search—no charge! Need a smaller, more-focused results set? Filter by:

– **Content category**, e.g., move to secondary sources and more. Just select a content type.

– **Adding more words** to your search. Enter them in the **Search Within Results** box.

– **Content options**, each content category offers different filter options, so you can only filter one content category at a time.

To add filters: Click a filter link; **it displays in blue under Narrow By.** Remove the filter; just click the **X** in the blue box. Select and remove multiple filters.

Save favorite filter combinations, e.g., your practice area and jurisdiction, to use again. Click the **star** and save the combination to your Favorites pod on the landing page.

SNAPSHOT VIEW: THE MOST RELEVANT RESULTS ACROSS ALL CONTENT

Save time by browsing the most relevant documents retrieved by your search—on one screen—with the Snapshot View. Use the Snapshot View to **deliver multiple documents,** e.g., print or email to colleagues or save multiple documents to Folders.

(A) **Scroll and view the top three results** by relevance. In the **Snapshot View,** the first four content categories in your search are open to display automatically.

(B) **Deliver or save documents across content categories!** It's fast. Browse and check the boxes of the document you want and click the **print**, **email** or **download** icons or the **Folder** icon. **And save even more time as you deliver.** Quick delivery options let you **bypass dialog boxes**. Download delivery plug-ins for **Google™ Chrome™** and **Apple® Safari®**.

(C) **Click a document link** to move to the full-text document.

(D) **Click View More Categories** at the bottom of the Snapshot screen to expand the Snapshot view.

ALERTS: GET UPDATES IN REAL TIME

Timely alerts

Convenient alerts help you stay on top of the latest changes in your results—
covering cases, topics, *Shepard's* analysis, pending legislation, news and more.
Or you can set up a publication alert and receive updates without a search query.

In addition, the Lexis Advance service offers **real-time alerts** among your delivery
options so you can get information **as updates become available.**

(A) Choose from convenient delivery options—even **real-time alerts delivered as updates are available**.

(B) When you view alerts and notifications on your home page, a blue dot means that item has new information.

(C) To easily edit your alerts, click **View all alerts**.

FOLDERS: SAVE AND ORGANIZE WITH EASE
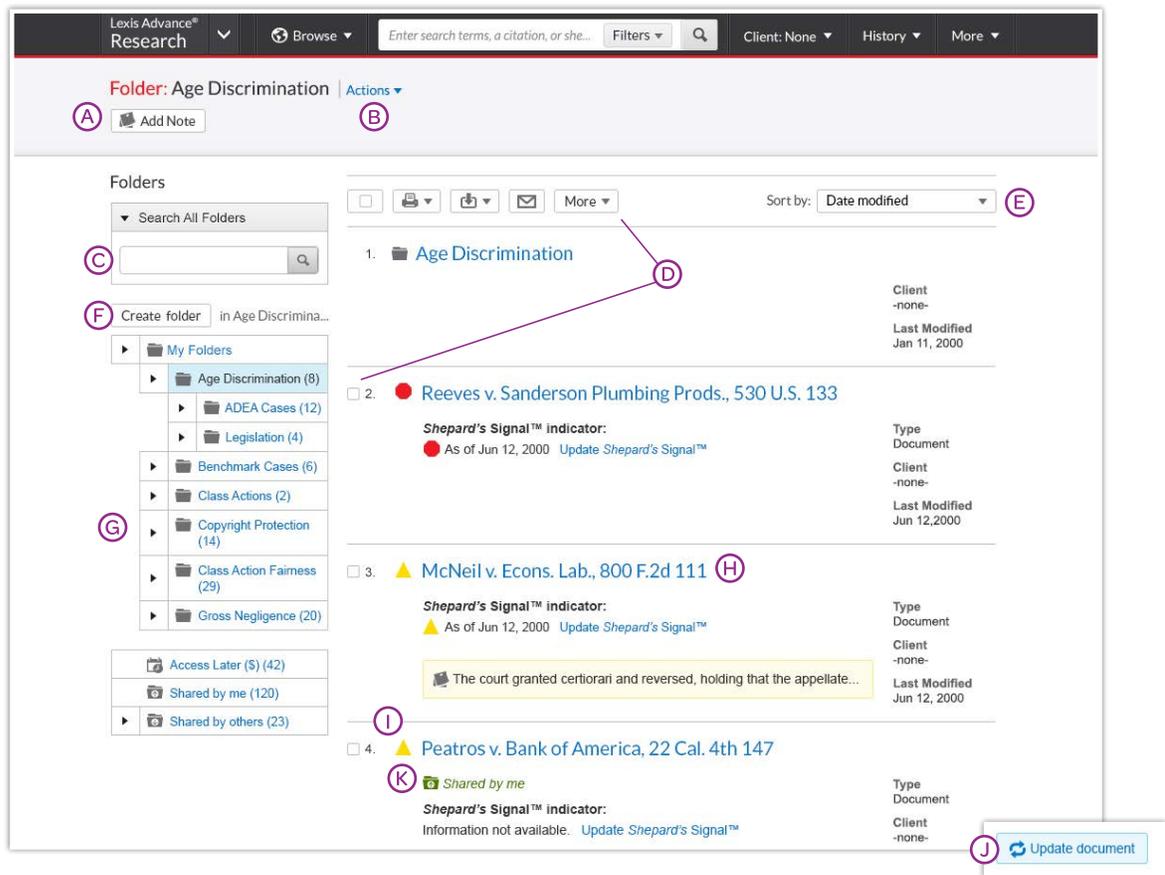
Gain access from the **Folder** pod on the landing page or click the **More** pull-down menu at the top of most Lexis Advance screens and choose Folders.

Save more than full-text documents. Copy and save selected document text, search results lists, effective searches and Research Maps from History, Web links, Topic Summary Reports, PDFs, etc., as well as documents from other LexisNexis® products like LexisNexis® Verdict & Settlement Analyzer. **Subscription documents stay in Folders** until you remove them. If your organization has the Folder sharing option, you can **share Folder items or entire Folders** and manage access.

(A) **Add Folder notes.** Click and add up to 4,000 characters.

(B) **Move, copy or delete Folders.** Click **Actions**. Also **download** the Folder, **rename** it or update all *Shepard's* **Signal™ indicators**.

(C) **Find vital facts across all Folders** and notes. Just enter your search words, e.g., *front pay*.

(D) **Use Folder listings/documents.** Check the **box(es)** next to the listing(s). Select a **delivery icon**, e.g., print. Select the **More** pull-down menu and **copy** the listing, **move** it to another folder, **remove** it from the folder, **manage sharing** options (if part of your subscription), etc.

(E) **Organize Folder documents.** Re-sort by date modified, newest documents, clients, relevance and more.

(F) **Create a new Folder** or subfolder within a Folder. To create a new Folder in My Folders, click **My Folders** then the **Create folder** button.

(G) **Move among your Folders.** Just select a Folder link. Click ▶ to open levels of subfolders. Each Folder shows how many documents it contains. Also see how many documents you've shared or saved for later purchase.

(H) **Click a document listing** link and view the search, filters and sources used to get the document. Retrieve the document or view the text selection. **Add Notes** to the listing. Also **View All Notes** for the Folder.

(I) **Ensure documents are good law.** See immediately when a document was checked via *Shepard's*. Update if needed.

(J) **Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them.

(K) **Manage shared Folders and items** and view items shared with you by colleagues.

DELIVERY OPTIONS: SAVE, PRINT, DOWNLOAD AND EMAIL

Deliver a **single document** as you view the full text of that document. Deliver **one or more documents** from the results list—even across content categories. **Select the checkbox** next to each document you wish to deliver.

Then look for the delivery icons at the top of the screen:

(A) 📁 **Save to a Folder:** Options help you select a folder, save the document(s) or results list(s) and add notes to preface the document(s).

(B) 🖨 **Print:** Options let you open as a PDF, format (fonts, search terms in bold, etc.), show headnotes in cases, etc. Save steps and bypass options screens too. Just select **Use default settings**.

(C) ⬇ **Download:** Options let you download as .Docx, .WP or .PDF, send to LexisNexis® CaseMap® case analysis software or download the results list. Even send as multiple, zipped files. Save steps and bypass options screens too. Just select **Use default settings**.

(D) ✉ **Email:** Options let you format (.PDF, .Docx, .WP), add recipient addresses, subject and message.

(E) ▢ **Get it Now:** Access documents you selected out of plan.

(F) ▢ **Printer-Friendly View:** Allows you to view the page without toolbars or navigation buttons.

STATUTES: GET MORE THAN FULL TEXT

When you view a full-text statute or case, you also have quick access to other vital analysis resources available via Lexis Advance, such as, *Shepard's* reports.

(A) **Save the document** to a Folder, print, deliver or share. Click **More** to request a printer-friendly version.

(B) **Jump To** specific **document parts,** e.g., opinion or headnotes. Move among **search terms** or **reporter pages**.

(C) **Move among results documents.** Click **Next Document** or **Previous Document**. Click **Results List** to move to **your results set**.

(D) **Copy the full-case citation** for your work. Include parallel citations and a link to the full-text case. Format using a variety of style formats.

(E) **Check the *Shepard's* status immediately!** See possible issues and move directly to the ***Shepard's* report**.

(F) **Change pagination.** Select a reporter.

(G) **Archived code versions** allow you to quickly access and analyze prior language of the statute you are viewing organized year by year.

(H) **Come up to speed on the legal topics.** Find **seminal cases and statutes**, relevant secondary sources and details on burden of proof, review standards, etc., for the legal topics covered. Also find **Topic Summary** Briefcase icons next to LexisNexis® headnotes. Click and link to Topic Summary Reports.

(I) **Highlight—and use—vital text.** When you highlight text, an options box displays. You can copy the text and paste it to your work; annotate and/or save the text to a Folder; search with the selected text; or highlight important passages. Then save the highlighted document to a Folder.

(J) **Link to full-text documents cited.** Just click the link. And, when judges, attorneys, expert witnesses and companies are mentioned, simply click on the underlined name to get more detail and the option to search across Lexis Advance for more information.

SHEPARD'S® CITATIONS SERVICE: CITE GOOD LAW

A **Navigate quickly** to the *Shepard's* report section that generated the signal:

  – **Legislative History**

  – subsequent **Citing Decisions**

  – **Other Citing Sources** such as treatises, or

B **Set an Alert** and get automatic updates when the *Shepard's* status changes. Even select change type, e.g., negative analysis.

C **Get the big picture on citing references.** Click **Grid** and see citing references in context over jurisdictions and time.

D **Subsection reports by specific court citation.** Courts and other sources that have referenced a citation. Each citation pattern has its own *Shepard's* report. Signals reflect the treatment of one or more citing cases in each report.

E **Save, deliver and/or share.** Familiar icons let you save reports to a Folder or deliver report specifics. For example, you can deliver the *Shepard's* report, the full text of citing decisions or both.

F **Sort report results** by date as well.

G **Filter citing decisions to get to vital cases faster.** Refine by specific treatment, jurisdictions or time frame. Even search for specific words within your results.

  Click a filter; **it displays in blue under Narrow By**. Remove the filter; just click the **X** in the blue box. Select and remove multiple filters.

H **See how citing cases** have been treated subsequently by viewing their *Shepard's* Signal indicators.

I **Use pinpoint citations.** Get flag colors, a short description, a pinpoint page reference—and the case language in question.

J **Review what each signal** indicator means in the *Shepard's* **Legend** at the bottom of the screen.

SHEPARD'S® GRAPHICAL: MAP THE APPELLATE HISTORY

Get a better understanding of your case's "life cycle" as it traveled over time through different courts.

(A) **View appellate history** in List view. Click the **Appellate History** subtab. A list of references is the default view.

(B) **View the history in a graphical map.** Click **Map**. (Map view is shown.)

(C) **Print your map.** Get a printer-friendly display. Then click the **Print** icon.

(D) **Understand map icons.** Click **Legend**. For example, the star labels the citation you *Shepardized*™.

(E) **Remove map notations,** e.g., indirect history and re-display the map.

(F) **Use these three icons** to zoom into the citation you *Shepardized,* move to a full-screen view or expand/contract your view, respectively.

(G) **Review vital cases in the appellate history.** Click a map icon. Then move to the full-text document or the reference in the List view.

SHEPARD'S® GRAPHICAL: SPOT TRENDS IN CITING REFERENCES

Rarely are cases overruled totally. Points of law within cases may continue to be cited across many jurisdictions. This grid shows you that quickly and effectively.

(A) **Set an Alert for changes.** Click the icon and request updates on negative analysis, any change or the changes you choose.

(B) **View citing references in List view.** Click **Citing Decisions**. The list of citing cases is the default view.

(C) **Get the big picture in a graphical grid.** Click **Grid**.

(D) **Print your grid.** Get a printer-friendly display. Then click the **Print** button.

(E) **Go to vital references in one step.** Click a grid box and move to those cases in the List view.

(F) **Filter by analysis phrase,** jurisdiction or year, e.g., click **7th Circuit (69),** to view those cases in the List view.

Understand grid components. Click **Legend** at the bottom of the screen. (Not shown)

HISTORY: RETURN TO A SEARCH QUICKLY WITH A 90-DAY VIEW

Get interrupted during research? Pick up where you left off quickly by going to your History. And go back to your Search History to save useful searches to your Folders.

View search history for the past 90 days. View searches, documents retrieved, *Shepard's* reports, documents delivered (You can quickly re-send them!), Web-page views, topic summaries, even searches from other LexisNexis products like LexisNexis® Litigation Profile Suite. **You can view your search history in a List view or as a graphical research map.**

(A) **Return to a search fast.** Select from the five most recent searches or documents from the **History pod** on the landing page. Or click **History** in the black header. Link to your complete History list by selecting **View all history**.

(B) **The List view** is the default view.

(C) **View your search history** in a graphical map. Click **Research Map**.

(D) **Print your history.** Get a printer-friendly list of searches. Then click the **Print** button.

(E) **Sort your history** by **date** (oldest or newest first), **client** number (highest or lowest first), **type** or search **title** (alphabetical or reverse alpha order).

(F) **Filter history to display** by date or date range, client or tasks type, e.g., Alerts created, email sent, Web searches, legal searches, etc. Only dates with research are included. Just click a date, type, etc.; the filter **displays in blue under Narrow by.** Remove the filter; just click the **X** in the blue box.

(G) **See search details up front.** Each listing tells you so much—content categories, search type, e.g., natural language, search terms, task type and more.

(H) **Return to your search**. Click the search title.

HISTORY: EXPAND YOUR RESEARCH WITH A VISUAL MAP

(A) **Get a step-by-step graphical** depiction of your prior research. Click **Map** to identify explored versus non-explored paths, possibly uncovering other relevant results.

(B) **Learn more** about map icons and graphical trails.

(C) **Add your History Map** to one of your Folders.

(D) **Share** your History Map via email or download. Request a printer-friendly view and print. Click **More** for options.

(E) **Compare 2 – 3 search results** to find common documents—and perhaps expand your research. Click a map search **icon** and **Select search to compare results**. Repeat. Then click **Compare Search Results**. Your results open in a new window.

(F) **Find similar relevant documents.** Click a document icon in your map and **Select document to find similar results**. Then click **Find Similar Documents**. This is a fast way to compare relevant documents to find more, including ones you may not have reviewed yet.

(G) **Filter your map.** Filter by **client, date,** etc. Search for **words** included in your map. You can also exclude specific searches, e.g., **trails,** on your map or change the trail order. Click **Reset map to default view** to clear filters.

(H) **Re-run or save your work.** Click a map icon and choose to **re-run** your search or **save a search to a Folder**.

DOCUMENTS COSTS: TRANSPARENT OUT-OF-PLAN PRICING

Documents outside your subscription are clearly marked and **cannot be accessed unless you take active steps** to purchase them.

Screens shown here are examples; they do not reflect current Lexis Advance prices.†

Searching out-of-subscription sources

Out-of-subscription sources can be added to your searches via Browse Sources without extra cost. There are no search charges or hourly charges in Lexis Advance subscriptions to see what documents are available with the exception of LexisNexis® Public Records.†

From **Browse Sources** screens:

*Sources marked with one asterisk: Search this source at no charge, but you will incur document-access charges if you select documents from the results screen and click "Get It Now!"

**Sources marked with two asterisks (and a grayed-out source name) are restricted documents and cannot be added to your search. However you can click on the information icon to learn more about the source to determine if it may be feasible to add to your subscription.

Out-of-plan documents in search results

All out-of-subscription documents are marked. Plus you can see the cost and your search words in context to help you make a purchase decision. Documents available at a special price include a **Save!** icon. (Not shown.)

You can only access the document via the Get it now! link. (The document title is not linked.) You can also save the out-of-plan summary to a Folder and purchase it later. There is no charge to hold an out-of-plan summary in a Folder. Click the checkbox then the Folder icon and make your Folder selection.

†See the Price Guide for Commercial Markets for current list prices.

Linking to out-of-plan documents

If you click an embedded link, i.e., attempt to link from a full-text subscription document to an out-of-plan document, you are notified and can cancel the task, or save or purchase the document.

Reminders on documents you purchase

Once purchased, documents you have viewed but did not save to a Folder can be accessed through your **History**.

Purchased documents that you saved to a **Folder** are accessible for one year from the date of purchase.

Lexis Advance shows you the **expiration date** on the:

- **Full-text document** in the "About this document" box
- **Search results** listings showing that document
- **History** lists displaying that document
- **Folder** listings for that document. Updates to that Folder document during the year you use the document are included in the purchase price.

Sign in
www.lexisadvance.com

Learn more
www.lexisnexis.com/advancesupport

Please note: Lexis Advance is continually evolving, so actual screens and features may vary slightly from those displayed here.