

Lexis Advance® User Guide

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What is Lexis Advance® ?

Lexis Advance® is a legal research tool that is efficient and easy to use, and includes the following product features.

- Simplified search box
- No source selection needed, but if you choose, you can limit your search by source, topic, category, jurisdiction, or practice area.
- *Shepard's*® Citations Service
- Folders for organizing your research
- Legal Issue Trail™
- LexisNexis® and Web content searching
- Additional features, such as LexisNexis® MedMal Navigator®, LexisNexis® Litigation Profile Suite, LexisNexis® Verdict & Settlement Analyzer, and Lexis Practice Advisor®

For more information about Lexis Advance, review these articles [\[A@S^cã ÁÇç\] & A^\]\]](#) :

- What is source selection?
- What is a search?
- What is narrowing my results?

Home Page

From the Lexis Advance® home page, you can begin or resume all of your research tasks, such as:


- Entering search terms to start a new search
- Finding sources in specific content areas with Explore Content
- Using Browse to find topics or sources, or to navigate to a Practice Center
- Selecting a search from history to run again
- Selecting favorite sources, topics, and filters to use for a search

The pods in the lower section of the home page (History, Favorites, Folders, Support, etc.) provide quick access to many frequently used features. You can customize this area of the home page by dragging and dropping the pods to arrange them in the order you wish.

Note:

To drag and drop a pod, use your mouse to click inside the title area of the pod (just under the color line), then drag the pod in the direction you want it. A target will appear where you can drop the pod.

All the features of the home page are described below.

Item	Description
Lexis Advance® Research	Select from this drop-down list to use a different LexisNexis® feature, such as LexisNexis® Counsel Benchmarking, LexisNexis® Litigation Profile Suite, LexisNexis® MedMal Navigator®, etc.
Browse	Use this drop-down list to browse or look for a specific topic or source, or to navigate to a Practice Center page.
Client	Select a Client or Matter name to assign your research to, or enter a new one.
History	Select a search you have run recently to see the results, select View all history to view your search history as a list, or select Research Map to view it in graphic form.
More	Use this drop-down list to open your folders, view your alerts, open the Lexis Advance online help, sign out, etc.
Advanced Search	Displays a form you can use to construct a search with terms and connectors, search in specific segments, and/or a specific content type (such as Cases, Statutes and Legislation, etc.).
Tips	This page provides a quick reference for using several key Lexis Advance® features, plus a list of frequently asked questions about using them.
Get a Doc Assistance	Displays a form you can use to retrieve a document by citation, party name, or by docket number, and provides help with citation formatting.
Search:Everything	Enter terms and connectors or a natural language search, select this to display the filters you can use to restrict your search, and then select the search button () to run your search.
Explore Content	Use this to select a specific source (or group of sources) by content area, jurisdiction, or practice area, or use the Content Type , Federal , State , or Practice Area tabs to browse through or search the sources.
History	Open this pod to see recent searches, documents you have retrieved, and <i>Shepard's</i> ® searches you have performed.

Folders	Displays a list of your folders.
News	Displays current news items.
Latest Updates	Provides a link to a description of the newest changes to Lexis Advance.
Favorites	The Favorites pod displays the sources, topics, and filters you have recently used in your searches.
Notifications	Displays a list of the notifications you have recently sent or received (notifications are sent when you share an item, such as a document, a folder, or an alert).
Alerts	Displays a list of your saved alerts and results.
Archives	Use this pod to access a collection of archived codes.
Support	This pod provides access to help pages, tutorials, and the LexisNexis Customer Support phone number.

How do I search using Lexis Advance®?

There are several ways to perform legal research with Lexis Advance®. To begin your research, select **Client** at the top of the page to associate your research with a specific client or matter. Then search using one of the methods below.


When you enter a search, you don't need to enter your terms using terms and connectors or natural language guidelines because Lexis Advance automatically determines which type of search to perform from your search terms. For example, if you enter `budget and deficit`, Lexis Advance will run a terms and connectors search, because the connector "and" is part of the search.

Note:

For information about segment searching, see [How do I search in specific segments?](#)

- Search all content
- Restrict your search to a specific jurisdiction, category, or practice area
- Restrict your search by date or date range
- *Shepardize*® a citation
- Resume previous research
- Restrict your search to specific sources
- Restrict your search to specific legal topics
- Search by citation
- Retrieve, print, or documents by citation
- Search archived codes

How do I search all content?

1. Enter your search terms in the search box, using either natural language or Boolean search construction.
 - Legal phrases and documents - If the terms you are typing are closely related to a legal phrase or document, you'll see a list of suggestions you can select from. Click one of these if you want to see the results for the suggestion instead of what you are typing. The legal phrase or document name will replace the terms you were entering in the search box.
 - Sources - If the terms you are typing are closely related to a source name, you'll see a list of possible source names displayed beneath the search box, next to **Add Source as a Filter**. Select one of these if you want to search in the source. Your selections will display under the search box. Click **Clear** to remove them.
2. Click the search button ().

Note:

In general, the longer the search query, the less likely you are to find documents containing all the search terms you entered. Any query can result in zero documents being found, but very long queries are more likely to do so.

How do I restrict my search using filters?


You can restrict your search to a specific category, jurisdiction, or practice area and topic, so you have fewer results; you can also restrict your search to a specific source or topic. When you get your results, you can narrow them further using the filters on your results page. Use one of the { ^@ã•Á } Á@Á ||| , ă * Á æ ^•Á Á restrict your search.

From Explore Content:



1. Select **Content Type**, **Federal**, **State**, or **Practice Area** under **Explore Content**.
2. Select the content you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.



4. Select the search button ().

From the search box:

1. Enter your search terms.
2. Select the down arrow () to the right of the **Search: Everything** button.
3. Select **Jurisdiction** or **Category**, or **Practice Areas & Topics**, or **Recent & Favorites** from the **Narrow By:** pane on the left.
4. Select one or more check boxes in the areas you want to restrict your search to. For example, to restrict your results to case law, select the **Cases** check box in the **Category** filter.
5. Select more filters and make your selections, if you want to restrict your search further.
6. To use a filter from your **Recent & Favorites** for a search, select it. If you made any other filter selections for the search, they will be replaced. The selections you make from the filters are displayed next to **Narrow By** as you select them.
7. Select the search button ().

Note:

The filters you use are added to the **Recent & Favorites** pod. Open **Recent & Favorites** to:


- Select the star () next to a filter to make it a favorite.
- To remove the filter from your favorites, select the  next to it.

To save a filter to be used in future sessions, select **Settings** from the **More** drop-down list at the top of the page, then select **Lexis Advance Research** from the options on the left. Select **Retain search filters for future sessions**.

What is Explore Content?

If you know which source or sources you want to search in, use **Explore Content** on the Lexis Advance® home page to navigate to them quickly. You can select a specific source (or group of sources) by content area, jurisdiction, or practice area.

If you don't have a specific source in mind, you can use the **Content Type**, **Federal**, **State**, or **Practice Area** tabs to browse through the sources available on each tab, or search all the sources available on the page.

When you select from **Explore Content**, a search form appears and the sources you selected are shown to the left of the search button ().

If you wish, you can save the path you took through **Explore Content** to use later or share. Once you've selected the source or sources you want, select **Link to this page** from the **Actions** drop-down menu. This creates a permalink you can copy and paste into your browser.

If you'd rather search by selecting pre-filters from the left panel, select **Search Everything** in the search box instead of selecting from **Explore Content**.

How do I restrict my search to a specific category?


Use one of the { ^c@ã•Á } Á@Á ||| , ã * Á æ ^•Áo restrict your search.

From Explore Content:



1. Select **Content Type**, **Federal**, **State**, or **Practice Area**.
2. Select the content you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

4. Enter your search terms in the search box.
5. Select the search button ().

From the search box:

1. On the search form, enter your search terms in the search box.
2. Select the down arrow () to the right of the **Search: Everything** button.
3. Select **Category** from the **Narrow By:** pane on the left.
4. Select one or more check boxes for the categories you want to restrict your search to. For example, to restrict your results to cases, statutes, and secondary materials, select the check boxes for **Cases, Statutes & Legislation**, and **Secondary Materials**.
5. Select the search button ().

Your results will contain documents only from the categories you selected.

Note:

The selections you make from Categories will be displayed next to **Narrow By** on the Filters page and used for future searches until you change it.

How do I search in specific segments?

In Lexis Advance®, all documents of the same type have a common structure, composed of the natural parts or divisions referred to as segments.

You can restrict your search to a specific part or segment of a document, such as the court that heard the case or the judge who wrote the opinion. Different types of documents have different segments. For example, a case doesn't have the same segments as a newspaper article.

To search in a specific segment, you can use the **Advanced Search** form (look for the link right above the search box), or type the segment name followed by your search terms in parentheses in the search box. This example uses the "name" segment for searching by party name:

```
name(griggs and duke)
```

Segment searching is especially useful when you are looking for:

- Opinions written by a particular judge
- Cases involving a specific party
- Cases in which a particular attorney or firm appeared as counsel

Which segments are searchable in Lexis Advance?

Lexis Advance does not search all of the same content types or segments as Lexis® (lexis.com). Below is the list of content types that you can currently search with a segment search using Lexis Advance.

- Administrative Codes and Regulations
- Administrative Materials
- Analytical Materials
- Company Financial
- Directories
- Statutes and Legislation
- Briefs, Pleadings and Motions
- Cases
- Secondary Sources
- Dockets
- Expert Witness Analysis
- Forms
- Jury Instructions
- Jury Verdicts and Settlements
- Legal News
- Scientific
- News

To see a list of all the segments condensed in table format, view [Segments in Lexis Advance](#) and scroll to the second page.

Searching in a Specific Segment

1. In the search box, enter your search, beginning with the segment name and followed by your search terms in parentheses. To find opinions written by Justice Sandra Day O'Connor, enter:

Example:

writtenby(o'connor)

2. Click **Search**.

Segment searches can be run as either a natural language or a Boolean search, depending on the search syntax you use. The table below has examples of segment searches using natural language and Boolean syntax.

To Find...	Type This
Cases when you know the party names, using natural language	name(griggs duke)
A legal news story when you know the headline, using natural language	headline(michael jackson death)
Cases when you know the party names, using Boolean syntax	name(griggs and duke)
Cases involving the right to counsel and heard by either Judge Anderson or Judge Markey, using Boolean syntax	right to counsel and judges(anderson or markey)
Cases argued by Jensen for which Posner wrote the opinion, using Boolean syntax	writtenby(posner) and attorney(jensen)

How do I search in a specific topic?

1. Select **Browse** at the top of the page, next to Lexis Advance®.
2. Select **Topics**.
3. When the topic list is displayed, do one of the following:

To...	Do This
Browse for a topic	Select a topic name to display more detailed topics that are categorized under that name.
Search for a topic when you know the name	Type a topic name, or part of the name, in the Search for topics box and select Search .

4. Select the topic you want to use.
5. Select the **Actions** drop-down menu.
6. Select **Add topic as a search filter**.

How do I browse through all available topics?

1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Topics**.
3. Select a practice area, such as **Administrative Law**, **Family Law**, etc. from the list.
4. Continue to expand the selections until you see the topic you want.

Tip:

To find a topic faster, enter it in the **Search for a topic** box and click the search icon.

5. Select the topic you want to use.
6. Choose one of the following options for how you want to use the topic:

Option	Description
Get documents	Choose this option if you want to view the documents associated with the topic.
Add topic as a search filter	Choose this option to include items in your search that are associated with this topic.
Create a topic alert	Choose this option if you want to be notified when updates to this topic are available.
View topic summary report	Choose this option if you want to view high-level information about the topic.

How do I restrict my search to a specific jurisdiction, category, or practice area?


You can restrict your search to a specific jurisdiction, legal topic or content type in one the , æ • Á^ • & ã^ áÁ } Á@ Á following pages.

From Explore Content:



1. Select **Content Type**, **Federal**, **State**, or **Practice Area** under **Explore Content**.
2. Select the content you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

4. Select the search button ().

To restrict your search using filters:

1. Enter your search terms in the search box, using either natural language or Boolean search construction.
 - Legal phrases and documents - If the terms you are typing are closely related to a legal phrase or document, you'll see a list of suggestions you can select from. Click one of these if you want to see the results for the suggestion instead of what you are typing. The legal phrase or document name will replace the terms you were entering in the search box.
 - Sources - If the terms you are typing are closely related to a source name, you'll see a list of possible source names displayed beneath the search box, next to **Add Source as a Filter**. Select one of these if you want to search in the source. Your selections will display under the search box. Click **Clear** to remove them.
2. Select **Search: Everything** to the left of the search button ().
3. Select **Jurisdiction**, **Category**, or **Practice Areas & Topics** from the left pane.
4. Select the check boxes for the filters you want to use.
5. Click the search button ().

How do I restrict my search to a specific jurisdiction?


You can restrict your search to a specific jurisdiction in one the ways described on the following pages.

From Explore Content:

1. Select **Federal** or **State** under **Explore Content**.
2. Select the content you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

4. Select the search button ().

To restrict your search using the Jurisdiction filter:

1. On the search form, enter your search terms in the search box.
2. Select the down arrow (▼) to the right of the **Search: Everything** button.
3. Select **Jurisdiction** under **Narrow By:** on the left.
4. Select one or more check boxes for the jurisdictions you want to restrict your search to. For example, to restrict your results to a Federal jurisdiction and the Ohio jurisdiction, select the check boxes for the **Federal** jurisdiction you want and for **Ohio**. The selections you make from the filters are displayed next to **Narrow By** as you select them. To remove a filter, select the ✕ next to it.
5. To include non-jurisdictional sources in your search, select **Include non-jurisdictional content**.
6. To include Federal sources in your search that are related to any jurisdictions you selected, select **Include related Federal content**.
7. Select the **Search** button.

Your results will contain documents only from the jurisdictions you selected.

Note:

The selections you make from Jurisdiction will be displayed on the search form and used for future searches until you change it.

How do I restrict my search to a specific date or date range?


You can restrict your search to a specific date or date range by using the date tool on the Advanced Search form, or by entering your search terms and one of the following date restrictions in the search box.

Restriction	Definition	Example
=	Date is	inauguration and = 2/21/1992
<	Date before	spanish w/3 currency and < 1990
>	Date after	insurance w/3 premiums and > 1/20/2009
<=	On or before	Sports w/3 bankruptcy and <= 01/1976
>=	On or after	Boat and seizure and >= 5/23/1999
> [begin date] and < [end date]	Date range	Mayor w/3 Peoria and > 01/01/1960 and < 12/31/1980

Note:

- Including the word `date` as part of the date restriction is unnecessary and may produce unexpected results. Searches should not include the word `date`.
- Use numbers, not words, to specify a month: `Sports w/3 bankruptcy and <= 01/01/1976`.

Date Formats

To restrict your search to a specific date or date range from the **Date** section on the **Advanced Search** form, select a date or date range from the drop-down list, then enter the date (or the starting and ending dates). You can either select a date from the calendar icons () or enter it using this format:

Mmm dd, yyyy

Or you may use any of the formats in the table below.

Note:

- When you add a date or date range to your search, it is not added to the search query shown in the search box although it is added to your search.
- If you include a date in your search, your results will contain documents with that publication date; documents with the date in the document text will not be included.

Any of these formats may be used.

Format	Example
mm/dd/yyyy	01/01/1999
mm/dd/yy	01/01/99
m/d/yyyy	1/1/1999
m/d/yy	1/1/99
Mmm. d, yyyy	Jan. 1, 1999
mmm. d, yyyy	jan. 1, 1999
Mmm d, yyyy	Jan 1, 1999
mmm d, yyyy	jan 1, 1999
Mmm d, yy	Jan 1, 99
mmm d, yy	jan 1, 99
Mmmmmmm d, yyyy	January 1, 1999
mmmmmmm d, yyyy	january 1, 1999
Mmmmmmm d, yy	January 1, 99
mmmmmmm d, yy	january 1, 99
yyyy	1999


How do I *Shepardize*® a citation?

1. In the search box, type `shep` followed by a colon (:), followed by the document citation.


`shep: 800 F.2d 111`

`shep: 410 us 73`

Punctuation, spacing, and capitalization within the citation are optional. However, the colon following "shep" is mandatory in order for the system to run a *Shepard's*® search and not a regular search.

2. Click the search button ().

How do I find a document when I know the citation?

1. Enter the citation in the search box.
2. Click the search button ().

How do I restrict my search to a specific source?

You can restrict your search to a specific source in one of the following ways.

To restrict your search from Explore Content:

1. Select **Content Type, Federal, State, or Practice Area**.
2. Select the content type you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

To restrict your search from the search box:

1. On the Lexis Advance® home page, type the name of a source into the Search box. As you type, possible source names are displayed beneath the search box, next to **Add Source as a Filter**.
2. Select the source you want to use.


Note:

If you have selected any other filters for this search, they will be replaced by your selection.

The source name is added next to **Narrow By** under **Filters**.

To restrict your search by selecting from a list of all sources:

1. On the home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

To...	Do This
Search for a source	Enter the name (or part of a name) of a source under Search for a source in the left pane, then select the search icon ().
Browse through all sources alphabetically	Select All Sources , then use the alphabetical listing to find the source you want.
Select a source by category	Select a category, such as By Jurisdiction, By Practice Area , etc. from the list, then select a sub-category, if there is one.


4. When you see the source you want to use, select it.
5. From the menu that appears, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

How do I retrieve a document when I know its citation?

To retrieve a single document when you know its citation, follow these steps.

1. Enter the document citation in the search box.
2. Select .

To retrieve documents by citation, party name, or docket number:

1. From the home page, select **Get a Doc Assistance**.
2. Select **By Citation**, **Cases by Party Name**, or **Cases by Docket Number**.
3. Follow the instructions on the screen to complete the form and retrieve the documents you want.

To enter multiple citations and download or print the documents or *Shepard's*® reports for them, when you know the citations:

1. Select the down arrow next to **Lexis Advance**® at the top of the page.
2. Select **Get & Print**.
3. Complete the form that appears.
4. Select **Go**.

What is Table of Contents browsing?



Note:

The Table of Contents is only available for publications having this structure, such as statutes and treatises.

In full document view, you can use the Table of Contents to display a document's location within a publication and navigate to other documents in that publication. For example, if you are viewing a specific Statute section, the Table of Contents displays the structure of the entire statute, showing the names of the sections before and after the one you are viewing.

From the results list view, you can display the Table of Contents for a publication by selecting the **View Table of Contents** link in the results list.

When the Table of Contents is displayed, you can:

- Select the right-facing arrow  to the left of a section to expand the section
- Search the headings and/or documents (or both) in the Table of Contents for specific search terms, publication names, or part of a name.
- Select the search icon  to the right of a section to search for specific search terms in that section.
- Select links in the Table of Contents to quickly view other sections of the publication.
- Display a document in the publication in a full-screen view.

When a section is open in the full-screen view, you can reopen the Table of Contents by selecting **Table of Contents** to the left of the document. Select it again to close it.

How do I select a specific source to search in?

To select a specific source, use one of the methods described on the following pages.

From Explore Content:


1. Select **Content Type**, **Federal**, **State**, or **Practice Area** under **Explore Content**.
2. Select the content you want to search in.
3. On the search form that appears, select **Search all sources on this page** or select the specific sources you want to search in.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

From Browse Sources:

1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

To...	Do This
Search for a source	Enter the name (or part of a name) of a source under Search for a source in the left pane, then select the search icon ().
Browse through all sources alphabetically	Select All Sources , then use the alphabetical listing to find the source you want.
Select a source by category	Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one.

4. When you see the source you want to use, select it.
5. From the menu that appears, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

The source name is added to the **Narrow By** pane.

How do I retrieve or print multiple documents when I know their citations?

To enter multiple citations and download or print the documents or *Shepard's* reports for them, when you know the citations, follow these steps.

1. From the home page, select **Get a Doc Assistance**.
2. Select **By Citation**, **Cases By Party Name**, or **Cases by Docket Number**.
3. Follow the instructions on the screen to complete the form and retrieve the documents you want.

How do I search archived codes?

You can search a collection of archived codes, including statutory codes, constitutions, administrative codes, municipal codes, and court rules.

On the home page:

1. Select **Archived Codes Search** on the **Archives** pod.
2. In the **Enter search terms** box on the **Search:Archived codes** page, type the words you want to search for.
3. Under **Narrow by**, select the category for the codes you want to search, the year or years to include in the search, and the jurisdiction, if desired.
4. Select **Search**.

How do I save a source as a favorite?

If there's a source you often search in, you can save it as a favorite for future searches, in one of two ways.

To save a source as a favorite from the source list:




1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

To...	Do This
Browse through all sources alphabetically	Select All Sources , then use the alphabetical listing to find the source you want.
Select a source by category	Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one.

4. When you see the source you want to use, select it.
5. From the menu that appears, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.




6. On the search form, select **Filters**.
7. Select **Recent & Favorites** from the pane on the left.
8. Click the star () next to the source you want to save as a favorite. The star turns yellow () to indicate that the source has been saved as a favorite.
9. To remove the source from your favorites, select the  next to it.

To save a source as a favorite from the search box:

1. On the home page, type the name of a source into the Search box. As you type, possible source names are displayed beneath the search box, next to **Add Source as a Filter**.
2. Select the source you want to use.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

3. On the search form, select **Filters**.
4. Select **Recent & Favorites** from the pane on the left.
5. Click the star () next to the source you want to save as a favorite. The star turns yellow () to indicate that the source has been saved as a favorite.
6. To remove the source from your favorites, select the  next to it.

Developing a Natural Language Search

To develop a natural language search, use terms that you might use when describing your research topic to another person. For example, to find articles about efforts in the fast food industry to use recyclable packaging, you might use this search:

What efforts has the fast food industry made to use recyclable packages?

Or, you can use just the most important terms and phrases, in any order.

recycle package fast food

How do I use search connectors?

Follow these steps to use search connectors to define relationships between your search terms.

1. On the search form, enter your search terms.
2. Enter one or more search connectors to join your search terms. For more information and example searches for each search connector, see "Using Search Connectors (*and*, *or*, etc.) and Commands (*atleast*)" in the Help.
3. Click the **Search** button.

Connector Order and Priority

Lexis Advance® uses the following order of operations for connector searches:

1. not / and not
2. or
3. proximity connectors¹, such as near/n, onear/n, w/n, pre/n, /s, /p, w/sent, w/para
4. and

Example: bankrupt! w/25 discharg! and student or college or education w/5 loan

This search query is processed in the following way:

1. or has the highest priority, so it operates first. In this example, student or college or education! is processed as a unit, which is created by the or connector.
2. w/25 operates next and creates a unit of the bankrupt! w/25 discharg! terms.
3. w/5 ties together the term loan and the student or college or education! unit.
4. and, with the lowest priority, operates last and links the units formed in the second and third items above.

¹ Proximity connectors operate from left to right, regardless of the number associated with the connector. This is also the case if you use the same connector more than once in your search string.

Lexis Advance® Equivalents for WestlawNext™ Connectors

If You Use this Connector to Search WestlawNext™	Use this Connector to Search Lexis Advance®
"search terms" (quotation marks enclosing a phrase – finds the exact phrase)	"search terms" (quotation marks enclosing a phrase – finds the exact phrase)
<i>and</i> (alternately, &)	and (alternately, &)
a space between terms (to replace <i>or</i>)	or
/p	/p or w/para Note: The w/para proximity connector will include "noise words" in the proximity of your two search terms. You can use w/para or w/p in place of /p if you wish. All 3 function the same way.
+p	pre/n (the number for n should be 50 or less)
/s	/s or w/sent Note: The w/sent connector will include "noise words" in the proximity of your two search terms. You can use w/sent or w/s in place of /s if you wish. All 3 function the same way.
+s	pre/n (the number for n should be 15 or less)
/n	w/n
+n	pre/n
but not (alternately, %)	and not

Words Ignored During a Natural Language Search

When you search using Natural Language or convert a Terms and Connectors search to run as Natural Language, the Lexis Advance® service considers the following terms "noise words" and does not search them:

all	also	am
an	any	are
as	at	be
because	been	could
did	do	does
e.g.	ever	from
had	hardly	has
have	having	he
hence	her	here
hereby	herein	hereof
hereon	hereto	herewith
him	his	however
i.e	if	into
is	it	its
me	no	of
on	onto	our
really	said	she
should	so	some
such	than	that
the	their	them
then	there	thereby
therefore	therefrom	therein
thereof	thereon	thereto
therewith	these	they
this	those	thus
to	too	unto
us	very	viz
was	we	were
what	when	where
wherever	wherein	whether

which	who	whom
whose	why	with
would	you	

Finding Variations of a Word

You can use the asterisk (*) wildcard character to search for variations of a word, making your search shorter and simpler.

- Use the asterisk at the end of a root word to find the root word plus all the words made by adding letters to the end of it. For example, `acqui*` would find variations on the term `acquire` such as `acquires`, `acquired`, `acquiring` and `acquisition`.

Tip:

- Use * only on unique roots; `fir*` will find `fired`, `firing` and `fires`, but will also find `first`, which you may not want.
 - You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.
- Use the ? to represent one or more characters within a word. For example, `int??net` would find `internet` and `intranet`.

Using * to Find Variations of a Word

Use an asterisk (*) to find a root word plus all the words made by adding letters to the end of it. For example, employ* would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- Use * only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.
- You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.

Using ! to Find Variations of a Word

Use an exclamation mark (!) to find a root word plus all the words made by adding letters to the end of it. For example, employ! would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- There must be at least 3 characters prior to the ! or you may receive unexpected results.
- Use ! only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.

Using ? to Find Variations of a Word

Use a question mark (?) to find variations of a word by replacing characters anywhere in the word, except the first character. Use one question mark for each character you wish to replace.

Examples:

- wom?n would find woman and women
- p??rson would find both the ea and the ie spelling of the name

and Connector

Use the `and` connector to find words that are far apart from one another or in different sections. Searches using `and` usually find more documents than searches using the `near` connector. As a general rule, use `and` when it doesn't matter where your search words appear in a document. Use the `near` connector when there is a connection between your search terms and you need to find the terms near each other.

For example, to find general information about budget deficits, you could use this search:

```
budget and deficit
```

However, to find documents that are relevant when your search terms are less specific, you may need to use the `near` connector. For example, the following search will find more relevant documents than if the `and` connector were used:

```
fiduciary near/1 duty near/10 breach
```

Note:

You can use an ampersand (&) in place of `and`. The two connectors operate the same way.

and not Connector

Use the `and not` connector to find documents in which a search word or phrase is to be excluded.

For example, the following search finds documents where the word "capital" occurs but the word "gains" does not.

```
capital and not gains
```

Because the exclusion covers the entire document, in this example, a document would be excluded if the word "gains" appears anywhere in the document.

You can exclude documents containing multiple words this way:

```
capital and not gains and not improvements
```

This example finds documents where the word "capital" occurs but the words "gains" and "improvements" do not.

Putting and not last

If you include `and not` in your search, it should be the last connector you use. Otherwise it may produce undesired results.

atleast Command

Use the `atleast` command to require that a term or terms appear "at least" so many times in a document. Use `atleast` when you want only documents that contain an in-depth discussion on a topic rather than just a mention.

For example, the following search requires references to CERCLA (the Comprehensive Environmental Response, Compensation, and Liability Act) to appear in every document at least 10 times:

```
atleast10(cercla)
```

You can use any number with the `atleast` command.

near/n Connector

Use the `near/n` connector to find documents with search words that appear within "n" words of each other. The value of "n" can be any number. Use `near/n` to join words and phrases that express parts of a single idea or to join closely-associated ideas.

Words or phrases linked by `near/n` must be in the same section (a specific part of a document). Either word may appear first.

For example, the following search finds documents in which both words appear in the same section, within three or fewer words of one another.

```
richard near/3 branson
```

It retrieves documents containing the words Richard Charles Nicholas Branson, Richard Branson and Branson, Richard.

Specifying the value of "n"

When choosing the value of *n*, these guidelines may prove useful:

Choose this...	For search words to appear here...
<code>near/3 - near/5</code>	in approximately the same phrase
<code>near/25</code>	in approximately the same sentence
<code>near/75</code>	in approximately the same paragraph

Tip:

Although you may choose a number for *n*, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple `near` Connectors

Multiple `near/n` connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog near/10 cat near/5 fish
```

onear/n Connector

Use the `onear/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime onear/3 compensation
```

`onear/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

Note:

You can use the `pre/n` connector in the same way as the `onear/n` connector. The two connectors operate the same way.

or Connector

Use the `or` connector to find documents that contain either or both of the words or phrases linked by `or`. Use the `or` connector to link search words that are synonyms, antonyms, alternative spellings, or abbreviations.

Synonyms	ship or vessel or boat
Antonyms	reasonable or unreasonable
Alternatives	takeover or take over
Abbreviations	british broadcasting corporation or b.b.c. or bbc

The search looks for the words or phrases linked by the `or` connector, not the word "or" itself. The words or phrases linked by `or` can be in any part of a document.

pre/n Connector

Use the `pre/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime pre/3 compensation
```

`pre/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

/n Connector

Use the /n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious /3 dog
```

Note:

You can use the /n connector in the same way as the w/n connector. The two connectors operate the same way.

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

Choose this...	For search words to appear here...
/3 - /5	in approximately the same phrase
/25	in approximately the same sentence
/75	in approximately the same paragraph

Tip:

Although you may choose any number for n, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple /n Connectors

Multiple /n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog /10 cat /5 fish
```

w/n Connector

Use the w/n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious w/3 dog
```

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

Choose this...	For search words to appear here...
w/3 - w/5	in approximately the same phrase
w/25	in approximately the same sentence
w/75	in approximately the same paragraph

Tip:

Although you may choose any number for n, you may want to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple w/n Connectors

Multiple w/n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog w/10 cat w/5 fish
```

w/p or /p Connector

Use the w/p or /p (within paragraph) connector to find documents with search words that appear within the same paragraph, or within approximately 75 words of each other.

For example, the following example finds "retirement" within the same paragraph as "benefit":

```
retirement w/p benefit
```

The following example finds "subcontract" or "sub-contract" within the same paragraph as "architect":

```
subcontract or sub-contract /p architect
```

Note:

You can use w/para in place of /p or w/p if you wish. All 3 function the same way.

w/seg Connector

Use the w/seg connector to find documents in which your search terms appear in the same segment (headline, body, etc.), or within approximately 100 words of each other.

For example, the following search finds documents where the word "unreported" and "income" appear in the same segment.

```
unreported w/seg income
```

w/s or /s Connector

Use the w/s or /s (within sentence) connector to find documents with search words that appear within the same sentence, or within approximately 25 words of each other.

For example, the following finds "earnings" within the same sentence as "taxation":

earnings /s taxation

Note:

You can use w/sent in place of /s or w/s if you wish. All 3 function the same way.

What is a *Shepard's*® citation search?

The *Shepard's*® Citations Service provides a comprehensive report of the cases, statutes, secondary sources, and annotations that cite your authority, including more recent cases that rely on your starting case. You can use this report to quickly validate your research and ensure you have good law.

Shepard's editors assign editorial analysis phrases that best fit the citing case within their editorial guidelines, helping you make a "good law/bad law" determination.


How do I *Shepardize*® a citation?

1. In the search box, type `shep` followed by a colon (:), followed by the document citation.

`shep: 800 F.2d 111`

`shep: 410 us 73`

Punctuation, spacing, and capitalization within the citation are optional. However, the colon following "shep" is mandatory in order for the system to run a *Shepard's*® search and not a regular search.

2. Click the search button ().

How do I *Shepardize*® a document when I know its citation?

Retrieving a *Shepard's*® report by citation can be done in a variety of ways.

The most common method is to enter "shep:" in the search box, followed by your citation, then press **ENTER** or click the search button.

You could also enter just the citation name in the search box, then click the *Shepard's* Signal™ indicator next to the document name.








The *Shepard's Signal*™ Indicators

The *Shepard's Signal*™ indicators are integrated into case law documents and provide an immediate indication of the subsequent history and treatment of a particular case. When these codes are present, the LexisNexis® research service displays one of the following signals.

Note:

Not every case will have a *Shepard's Signal* indicator.

When a signal is generated from the Subsequent Appellate History, the system looks at the Subsequent Appellate History as a chain of interconnected events. Thus, the phrase generating the signal may be assigned to a decision in that chain that does not apply directly to your case, but may be several links in the chain away from your case.

Indicator	Description
	Warning: Negative treatment is indicated The red <i>Shepard's Signal</i> indicator indicates that citing references in the <i>Shepard's</i> ® Citations Service contain strong negative history or treatment of your case (for example, overruled by or reversed).
	Warning: Negative treatment is indicated for statute The red exclamation point <i>Shepard's Signal</i> indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain <i>strong negative treatment of the Shepardized</i> ™ section (for example, the section may have been found to be unconstitutional or void).
	Questioned: Validity questioned by citing references The orange <i>Shepard's Signal</i> indicator indicates that the citing references in the <i>Shepard's</i> Citations Service contain treatment that questions the continuing validity or precedential value of your case because of intervening circumstances, including judicial or legislative overruling.
	Caution: Possible negative treatment indicated The yellow <i>Shepard's Signal</i> indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that may have a significant negative impact on your case (for example, limited or criticized by).
	Positive treatment indicated The green <i>Shepard's Signal</i> indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that has a positive impact on your case (for example, affirmed or followed by).
	Citing references with analysis available The blue "A" <i>Shepard's Signal</i> indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain treatment of your case that is neither positive nor negative (for example, explained).
	Citation information available The blue "I" <i>Shepard's Signal</i> indicator indicates that citing references are available in the <i>Shepard's</i> Citations Service for your case, but the references do not have history or treatment analysis (for example, the references are law review citations).

What is narrowing my results?

Your search results may be presented in one of the following ways:

- For searches that retrieve multiple documents, your results are displayed as a list. On the left side of the page, you can view options for narrowing your results to a specific category type. If you want to view at-a-glance details for every category all at once, you can view the **Snapshot** page.

Your search (or a portion of it, depending on how long it is) appears at the top of the page next to **Results for:**. A smaller search box is also displayed at the top of the page, so you continue your research.

- If you retrieved an individual document by entering its citation in the search box, that document is displayed at the top of the results list, with other documents containing that citation displayed below it. If the document is included your subscription, it appears automatically. If it is outside your subscription, you'll have the option of accessing it for a fee.
- Multiple documents retrieved by a single citation (such as table cases) appear as a list of documents.
- If you enter multiple citations in the search box, your results are displayed as a list of documents.
- If you used the **Search for (citation)** option in **About This Document** to retrieve all documents referencing a specific citation, the documents will be displayed as a list of results, regardless of any specific content type, jurisdiction, practice area, or "Start in" selections you made before your search.

Use the **Narrow By** pane on the left to narrow your results by entering search terms in the **Search Within Results** filter, or by several specific criteria, such as jurisdiction, court, timeline, and so on, depending on what kind of search you ran and what types of content your results contain. By default, the jurisdiction, location, and court filters are displayed by number of results (highest - lowest). You can change this to display them in alphabetical order instead, in **Settings**.

You can also use the search form at the top of the page to change your search terms, or change the content type, jurisdiction, practice area, etc. you want to search and run the search again.

Results List Page

Your search results may be presented in one of the following ways:



- For searches that retrieve multiple documents, your results display as a list of documents in the categories you selected when you selected the filters for your search. The number of results found for each category is displayed following the category name, and next to each filter in the pane on the left. If more than 10,000 results were found for a category, **(10,000+)** is displayed. The first category listed is the category you chose to start in. To display the documents for a different category, select it from the left pane.



Your search terms appear at the top left of the page below the navigation bar.

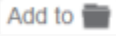







- If you retrieved an individual document by entering its citation in the search box, it is displayed as the only document in the results list. To see a list of other documents that reference the citation, select the **Results List** link at the top of the page.
- Multiple documents retrieved by a single citation (such as table cases) display as a list of documents on the results page.
- If you enter multiple citations in the search box, your results display as a list of documents on a results page.

Select any highlighted search term in a document in your results list to open that document, scrolled to the location of the search term.

The search form is displayed at the top of your results so you can modify your search terms or the content type, jurisdiction, practice area, etc. you want to search, and run the search again.

Value	Description
Results for [your search terms]	Displays your search terms.
	Click to save your search to run automatically on a schedule you specify.
Actions	<p>Click this to display a list of additional things you can do with your results.</p> <p>Add search to folder Select this to save your search to a folder.</p> <p>Run search as terms & connectors Run the search as a terms & connectors search.</p> <p>Include legal phrase equivalents Expand the search results to include all legal phrase equivalents for the selected keyword.</p> <p>+ Expanded results Expand your results to include all the documents containing any of your search terms. (This option displays only if you ran a Natural Language search.)</p> <p>- Fewer results Display only the results that contain all of your search terms. (This option displays only if you selected + Expanded results from the Actions menu after a Natural Language search.)</p> <p>Link to this page Select to display the permanent link for the page so you can copy it to save or share it with others.</p>
	To display the location and distribution of each of your search terms in each of the documents in your results in a graphical display, select this icon. You can set a default for this view in Settings .

	<p>To display the results page with each document showing the title and several lines of text to help provide context, select this icon. You can set a default for this view in Settings.</p>
	<p>To display the results page with each document showing the title and 4 additional pieces of information (such as the court, jurisdiction, or judgment date), select this icon. You can set a default for this view in Settings.</p>
<p>Sort by</p>	<p>By default, the documents in your results list are sorted by relevance.</p> <p>Select an option from this list to sort in a different order. You can select from relevance, document title (A to Z or Z to A), jurisdiction, court, or date (newest to oldest or oldest to newest).</p>
<p>Jump to</p>	<p>In the Snapshot view, use the Jump to drop-down list to display the results for the other categories you selected when you selected the filters for your search.</p>
<p>Narrow By</p>	<p>If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the Narrow By pane on the left side of your results.</p> <ul style="list-style-type: none"> ■ Use the Search Within Results filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: <code>dog bite liability</code> and your answer set is very large, you might enter the terms: <code>assumed risk</code> to narrow the results to only documents that also contain those terms. ■ Use the other filters, such as Content Type, Jurisdiction, Timeline, Sources, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. You can select whether you want location-related filters (jurisdiction, location, and court) to be sorted by number of results or alphabetically by default, in Settings. You can also choose to have the three jurisdictions and locations you use most often listed first. <p>To select several criteria in a category, use Select multiple.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ If you are viewing your results in the Cases category, Category is not displayed in the Narrow By pane because your results are already narrowed to the Cases category and can't be narrowed any further. However, some categories, such as Analytical Materials can be further narrowed down, so the subcategories are displayed under Category when you are viewing your results from the Analytical Materials category. ■ The categories and headings in the Narrow By pane depend on the kind of search you ran. For example, a legal search may have headings for Federal and specific states under the Jurisdiction category. Results for a <i>Shepard's</i>® search may have headings for Warning, Caution, Positive, etc. under the Analysis category. ■ Documents may appear in more than one category. For example, case law documents would appear in the "Cases" category, in one of the jurisdictions, and would also contain a number of keywords and/or citations. <p>To return to a previous results set after filtering one or more times, select the Clear link under your selections at the top of the Narrow By pane to close that version. When you have closed all the versions, your original results are displayed on the right side of the results view.</p>

Practice Areas & Topics	<p>Select specific practice areas and topics available to display search results associated with the selected practice area or topic.</p> <p>Tip: Click the Select multiple link to select multiple practice areas or topics.</p>
Timeline	<p>To select a specific date range and display the number of results within it, you can do one of the following:</p> <ul style="list-style-type: none"> ■ Slide the indicator toward the center of the diagram from either end and select OK ■ Enter a beginning and ending date in mm/dd/yyyy format and select OK
Most Cited	<p>A list of links to related results for the most cited documents related to your search.</p> <p>Tip: Click More to view more results, or select Less to view fewer results.</p>
Keyword	<p>A list of links to related results for similar keyword searches.</p> <p>Tip: Click More to view more results, or select Less to view fewer results.</p>
Did you mean:	<p>You may see suggested search terms here if there are terms closely related to those you entered that might improve your search results. Click the suggested terms if you want to see the results for those terms instead of what you entered. The suggested terms will replace those you entered in the search box.</p>
	<p>To select one or more documents to add to a folder, select the check boxes next to the documents in the list, and then select the Add to folder icon at the top of the column.</p>
	<p>To select one or more documents to print to an attached printer, select the check boxes next to the documents in the list, and then select the Printer icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p>
	<p>To select one or more documents to save to your computer, select the check boxes next to the documents in the list, and then select the Save icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p>
	<p>To select one or more documents to email, select the check boxes next to the documents in the list, and then select the Email icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p>
	<p>To select one or more documents to send to Dropbox, select the check boxes next to the documents in the list, and then select the Send to Dropbox icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p>
	<p>To get a document outside of your subscription, select this icon.</p>
 Printable page	<p>Click to view the list in a printer-friendly format.</p>
	<p>Click the right or left arrow to display the previous or next group of documents in your results.</p>
Document Title	<p>To view the full document, select the document title. To sort your results alphabetically by document title, select the column header. Click it again to restore it to the original order.</p>
View Table of Contents	<p>Select this to view the table of contents for the document, if the document has one.</p>

Jurisdiction	The jurisdiction of the document.
Court	The court of the document.
Date	The date of the document.
1 2 3 4 5 ...	Indicates which page in your results set you are viewing. Click a different page number to display that page, or use the right or left arrows to scroll through your results set.

How do I narrow or filter my results after a search?

If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the **Narrow By** pane on the left side of your results.

- Use the **Search Within Results** filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: *dog bite liability* and your answer set is very large, you might enter the terms: *assumed risk* to narrow the results to only documents that also contain those terms.
- Use the other filters, such as **Category**, **Jurisdiction**, **Timeline**, **Sources**, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. The filters that are available for narrowing your results depend on what kind of search you ran and what types of content your results contain. For example, if you ran a legal search, the filters in the **Narrow By** pane include **Cases**, **Statutes**, **Court**, **Jurisdiction**, etc. If you ran a *Shepard's*® search, the filters include **Jurisdiction**, **Analysis**, etc.

See the table below for more information about using filters.

Note:

- If you are viewing your results in the **Cases** category, **Category** is not displayed in the **Narrow By** pane because your results are already narrowed to the Cases category and can't be narrowed any further. However, some categories, such as **Analytical Materials** can be further narrowed down, so the subcategories are displayed under **Category** when you are viewing your results in the Analytical Materials category.
- Documents may appear in more than one category. For example, case law documents would appear in the "Cases" category, in one of the jurisdictions, one of the sources, and would also contain a number of keywords and/or citations.

After running a search and reviewing your results:

If you want to...	Do this
Narrow your results to documents containing specific search terms or a citation	Enter your search terms or a citation in the box under Search Within Results and select OK .
Narrow your results by the other filters in the Narrow By pane	Click the item under a filter heading (such as Category , Legal Topic , Jurisdiction , etc.) that you want to restrict your results to, and select OK . For example, to restrict your results to case law only, select Cases under Category .
Narrow by more than one category under a filter	Click Select multiple , select the check boxes for the categories you want to narrow your results to, and select OK .
Restrict your results to a particular date range	Under the Timeline filter of the Narrow By pane, use your mouse to move either of the sliders to the left or right until the date range you want is displayed, or enter the dates in the the year fields, and select OK .
Return to a previous results set	Click the X next to your selections at the top of the Narrow By pane to close that version of your results.
Return to your original results after narrowing them one or more times	Click the Clear link at the top of the Narrow By pane.
Find your original or Search Within Results search terms in a document	Open a document from your results, and select the terms you want to find from the Navigate tool at the top right side of the document.

Note:

Each time you narrow your results, the results are cumulative. For example, you can narrow your results to **Cases**, then to a specific time line within those cases, and then to a specific jurisdiction or court within those cases in the timeline.



How do I save my research?

The search terms, documents, and other activities from your research are automatically saved in your history for up to 90 days. You can access them by selecting the **History** drop-down list at the top of any page. Your last 5 searches are also available from the **History** pod on the Lexis Advance® home page.

If you want to save your search terms or documents from your results for an unlimited time, you can save them to **Folders**.

To do this:

1. After running a search and reviewing your results, do one of the following:

To...	Do This
Save a search	From the results list, select the Actions drop-down list (near the top of the page) and select Add search to folder . The Add to Folder dialog box appears. Proceed to Step 3.
Save one or more documents from the results list	<ol style="list-style-type: none"> a. Select the check box next to each document you want to save, then select the Add to folder () icon at the top of your results. A list of options for saving the document appears. b. To save the document or documents to a specific folder you've already created and used recently, choose that folder from the list. The documents are saved to the selected folder, and no further steps are required. c. To save the document set to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below.
Save a document from the full document view	<ol style="list-style-type: none"> a. While viewing the full document, select the Add to folder () icon at the top of the document. A list of options for saving the document appears. b. To save the document to a specific folder you've already created and used recently, choose that folder from the list. The document is saved to the selected folder, and no further steps are required. c. To save the document to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below.

2. At the **Selected Documents** tab of the **Add to Folder** form that appears, enter a title for the items you want to save (select **Edit all titles** to do this), or keep the title that is displayed.
3. At the **Save Options** tab, choose any of the following options, depending on whether you're saving a search or saving a document:

Option	Description
Save Search (Add search to folder option)	Enter a different name for the search in the Save Search box.
Store Narrow By selections for (Add search to folder option)	Choose whether to save your Store Narrow By selections by choosing Category I'm currently viewing or All categories .
What do you want to save?	Choose whether you want to save the documents you've specifically selected or the full results list for your search.
<p>Note: If you are viewing the full document, the</p>	

Option	Description
Results list option isn't available.	<p>Note:</p> <p>If you select to save results to the folder, you can specify exactly which results by entering the range of results in the The following results ... box. See "Delivering a Range of Results from a Results List" in the Help for a description of how to do this.</p>
Notes	Type any notes about your research in the Notes box.
Save In	Select the folder you want to add the items to, or select the Create New Folder button to create a new folder.

- To share the folder with other users, select the **Share with Others** tab and then enter the name or email address of the person you want to share with. Then click **Add**.

Note:

To share with others within your network or group of users, enter the peer's name. To share with users outside your group, enter the user's email address. Click **Add to Share** to add the name to the list.

- Click **Save** to save the items.

To retrieve your saved items, select the **Folders** link from **More** drop-down list at the top of any page or select the item from the **Folders** pod on the home page.

What is the graphical view?

The graphical view shows the location and distribution of each of your search terms in each of the documents in your results in a graphical display. The graphical view is available in both your results list and in the full document. At a glance, this view gives you an idea of how often your search terms occur in your results or a specific document, which terms appear in close proximity to others, and which segments they appear in.

You can use the graphical view to navigate directly to points in your documents where your terms appear together, or select a highlighted term to view an extract of the document where the term appears.


You can change or remove the search terms you want included in the display.

How do I view the search terms in my results graphically?



The graphical view shows the location and distribution of each of your search terms in each of the documents in your results in a graphical display. The graphical view is available in both your results list and in the full document. At a glance, this view gives you an idea of how often your search terms occur in your results or a specific document, which terms appear in close proximity to others, and which segments they appear in. You can use the graphical view to navigate directly to points in your documents where your terms appear together, or select a highlighted term to view an extract of the document where the term appears.

When you run a search, the graphical view displays a list of your search terms at the top of your results, each highlighted by a different color. The color of each search term corresponds with the lines in a search term location bar displayed in each document in your results. The search term location bar is divided into the same segments that occur in the document. The highlighted search terms are also displayed in the excerpt of text displayed with each document.

1. Run a search.

2. When your results are displayed, select the graphical view .

3. Do one of the following:

To...	Do This
Change the search terms that are analyzed.	Select Show/hide term hits . Select the terms you want analyzed.
Display all analyzed search terms with a single highlight color.	Slide Multicolor to the off position.
View other extracts from the document	Select one of the other highlighted areas in the search term location bar that is outlined in blue (indicates an available extract).
Go to the location in the document where your search terms appear.	Select View this passage in full document below the extract.
View the full document with the same terms and highlighting as in the results list	Select the document title.
Analyze different terms in the full document	Select Show/hide term hits . Select the terms you want analyzed.
Turn off the graphical view	Select the full or title view icon at the top of the results list (  .

What's the difference between "Expanded Results" and "Fewer Results"?

When you run a natural language search on Lexis Advance®, the **Actions** menu at the top of your results will have an option that says either **Expanded results** or **Fewer results**. The option that is displayed depends on what your results list contains.

When you select the option, the number of documents in your results list will change. If you select **Expanded results**, your results list will expand to include all the documents containing any of your search terms. If you select **Fewer results**, your results list will change to retrieve only the top results.

You can control which kind of results list is displayed first every time you search, in **Settings > Lexis Advance® Research** under **Preferred Results Set Display**.

Terms and connectors searches are not affected by this option. If you run a search using terms and connectors, or select **Run search as terms & connectors** from the **Actions** menu at the top of your results, the **Expanded results** and **Fewer results** options are not available.

How do I get back to my previous results after narrowing them one or more times?

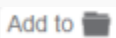

- To return to previous versions of your results one step at a time, select the Remove icon (✕) next to each of your selections at the top of the **Narrow By** pane.
- To return to your original results after narrowing them one or more times, select the **Clear** link at the top of the **Narrow By** pane.





Full Document Page





When you select a document from your results, the full text of the document is displayed. You can return to your results list by selecting **Results List** at the top of the page. Use **Previous Document** and **Next Document** to display the previous or next document in your results.


The **Shepard's**® pane to the right of the document lets you *Shepardize*® the document. **About This Document** provides more information about the document and access to the Legal Issue Trail™ so you can track the legal issues addressed in the case law document.

The search form is displayed at the top of your results so you can modify the terms, content, or topics you want to search, and run the search again if you wish.

Value	Description
Document Title	The title of the document.
	Select this to save the document to a folder within Lexis Advance® so you can quickly access it again later.
	Click the delivery icon drop-down list in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) Choose the delivery option you want from the drop-down list of options that appears.
Go to	<p>Click the Go to drop-down list to display specific parts or sections of the document that you can navigate to quickly. Sections of the document may include the following (not all sections will appear in every document):</p> <ul style="list-style-type: none"> Top of document Select this to go to the top of the document. Reporter If multiple reporters are listed, you can select a different reporter name to display the document in that reporter. You can also select a different reporter from the drop-down list at the bottom of the page. Subsequent history Subsequent history of the case. Prior history Prior history of the case. Core terms Important words and phrases that appear within the document. Disposition Disposition of the case. Case Summary Case summary of the case, including the Procedural Posture, the Overview, and the Outcome of a case law document. Case summaries appear at the top of a document when it is displayed in the full view and can help you quickly determine whether to read the case in detail or review the next case in your results. Procedural Posture Procedural Posture section of the Case Law Summary. Overview Overview section of the Case Law Summary. Outcome Outcome section of the Case Law Summary. LexisNexis® Headnotes LexisNexis® Headnotes identify the major points of law found in an opinion, expressed in the actual language of the court.

	<p>Each LexisNexis Headnote is numbered (such as HN#1) and shows a down arrow next to the text. If you select the down arrow or the LexisNexis Headnote number, you'll jump to the location of that headnote in the actual body of the case. At that location, an up arrow is displayed; selecting this returns you to the list of LexisNexis Headnotes, where that headnote occurs.</p> <p>Headnotes/Syllabus The abstract or summary of a point of law.</p> <p>Summary The summary of the case.</p> <p>Counsel Names of the legal counsel representing each party in the case recorded in the document.</p> <p>Judges Names and titles of the judges presiding over the case recorded in the document.</p> <p>Opinion by Name of the judge delivering the opinion recorded in the document.</p> <p>Opinion Text of the opinion delivered by the judge listed under Opinionby.</p> <p>Concur by Name of the judge delivering the concurring opinion recorded in the document.</p> <p>Dissent by Name of the judge delivering the dissenting opinion recorded in the document.</p> <p>Dissent Text of the dissenting opinion delivered by the judge listed under Dissentby.</p>
Navigate	<p>Select All Terms or select one of your search terms from the drop-down list and select the right or left arrows to go backward or forward in the document to specific search terms. If you select Activate Passages under Legal Issue Trail in the right pane, you will also see Passages displayed here as an optional way to navigate (from one activated passage to the next).</p>
Page	<p>Select the up or down arrows ( and ) to page through the document using the pagination of the reporter that is currently selected.</p>
Search Document	<p>Click this button to enter the terms for which you'd like to search, and click the Search button. This lets you search the document for search terms not in the predefined list.</p> <p>Terms are highlighted in the document, and you can use the up or down arrows ( and ) to navigate between them.</p>
More	<p>Note: This drop-down list is available for documents saved in work folders.</p> <p>Select this to display other options for the document.</p> <p>Note: These options may appear as their own buttons on the toolbar, depending on how much room there is in the browser window to display the toolbar.</p> <p>Move to another folder Select this to move the document to a different folder.</p> <p>Copy to another folder Select this to leave the document in the current folder, and put a copy of it in a different folder.</p> <p>Delete document from folder Select this to delete the document from the current folder.</p>



	<p>Stop sharing this document Select this to end sharing of this document with others.</p> <p>Printer-friendly view Select this to display a text-only version of the document, without any graphics, navigation bars, or options on the page.</p>
Shepard's Signal™ indicator	Indicates the value of the case as a precedent. You can select the indicator to <i>Shepardize</i> the case and display the current <i>Shepard's</i> ® report with a list of other legal authorities that have cited your case. (To see a definition of the signal indicator, leave your mouse pointer over the signal for a few seconds.)
Copy Citation	Select this to copy the document citation (including the pinpoint cite, if any) to the clipboard so you can paste it into a word processor document, email, etc.
Tools	<p>While reviewing the document, you can select a section of text, then select any of these tools from the menu that appears:</p> <p>Copy (Quick) Select this option to copy the highlighted text and its citation without reviewing all of the options available for copying and formatting. The text and citation will be copied using the system's default settings for the specified style guide. You can then paste the text into any text-editing application.</p> <p>Copy (Advanced) Select this option to display the Copy Selected Text to Clipboard dialog box, where you can choose different options that will be used to format the citation associated with the text you are copying.</p> <p>Add to folder Save the text to a folder.</p> <p>Add to search Select this to search for documents that contain text similar to the text you selected.</p> <p>Annotate Annotate the text.</p> <p>Highlight Apply highlighting to the document text. You can choose the color of highlighting.</p>
Results List	Select this to display your results list.
Previous Document	Select  to display the previous document in your results list.
Next Document	Select  to display the next document in your results list.
Reading View	Select  to display the document in reading view. In this view, only a few tools will be available for working with the document. To access the full range of tools again, click the Reading View button () again.
Shepard's®	The <i>Shepard's</i> ® pane shows information information about your document, including whether prior history is available, citing decisions, and other citing sources.
Shepardize® this document	Select this to <i>Shepardize</i> the document. <i>Shepardizing</i> ™ the current citation verifies whether the case is still good and lists other cases that have cited your case, in a report.
About This Document	This area contains links to information related to the case, plus several types of documents (the document types that appear under About This Document depend on what is available for the document you're viewing).

	<p>Original Source Image Select this to open a PDF document of the official version of the case.</p> <p>Case File Select View Case File to open the supporting documents related to this case as the case moves through the litigation process (from trial through appeals). Supporting documents include:</p> <ul style="list-style-type: none"> ■ Cases ■ Briefs, pleadings, and motions ■ Jury verdicts ■ Dockets ■ Expert witness testimonies and reports <p>Topic Summaries Select View reports to open a summary of a legal topic, including definitions of terms related to the topic and links to the full text of seminal cases heard on the topic.</p> <p>Annotations Select from the following options:</p> <ul style="list-style-type: none"> ■ Select View parts to view the different parts of the statute. ■ Select Search for [search term] within annotations to view the locations within the statute where the search terms are used. <p>Related Court Materials Dockets, Briefs, Motions, and Pleadings related to the document.</p> <p>Dockets Select this link to select from a list of the dockets related to the case that you can view.</p> <p>Briefs Select this for the written legal arguments stating the legal reasons for a case based on statutes, regulations, case precedents, legal texts, and reasoning applied to facts in the particular situation.</p> <p>Motions Select this for the formal written requests made to the judge by a party in the case.</p> <p>Case Analysis Contains expert analysis of the case.</p> <p>Emerging Issues Analysis Select this to open a document containing analysis by eminent experts.</p> <p>Legal Issue Trail - Activate Passages Select this to display a list of cases that cite to the case you are viewing, as well as cases your case has cited, for a specific legal issue or point of law. You can use the Legal Issue Trail to quickly review the citing documents and reason-for-citing (RFC) passages in them to aid in determining the value of the current case for the legal issue you are researching.</p>
Back to Top button ()	Select this button, which always appears at the bottom the window, to scroll the page you are viewing back to the top.

How do I save a document from my results to a folder?

After running a search and reviewing your results:

1. Do one of the following:

To...	Do This
Save one or more documents from the results list	<ol style="list-style-type: none"> a. Select the check box next to each document you want to save, then select the Add to folder () icon at the top of your results. A list of options for saving the document appears. b. To save the document or documents to a specific folder you've already created and used recently, choose that folder from the list. The documents are saved to the selected folder, and no further steps are required. c. To save the document set to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below.
Save a document from the full document view	<ol style="list-style-type: none"> a. While viewing the full document, select the Add to folder () icon at the top of the document. A list of options for saving the document appears. b. To save the document to a specific folder you've already created and used recently, choose that folder from the list. The document is saved to the selected folder, and no further steps are required. c. To save the document to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below.

2. At the **Add to Folder** dialog box, click the **Selected Documents** tab to review the documents you have selected. If you want to remove a document from a list that contains multiple documents, clear its check box.

Note:

To edit a title for a document, select **Edit all titles**, click in the box for the document you want to rename, and then enter the new text.

3. Select the **Save Options** tab to specify how you want the document to be saved:

- To select whether to save the **Selected Documents** or your **Results list**, select the appropriate option.

Note:

If you select to save results to the folder, you can specify exactly which results by entering the range of results in the **The following results ...** box. See "Delivering a Range of Results from a Results List" in the Help for a description of how to do this.

- To include a note with the saved documents, enter it in the **Notes** box.
- To create a new folder for the document, select the folder where you want the new folder to be saved and then click **Create New Folder**.
- To save the document or documents to a specific folder, select it in the list.

4. To share the folder with other users, select the **Share With Others** tab and then enter the name or email address of the person you want to share with. Then click **Add to Share**.

Note:

To share the document with others within your network or group of users, enter the peer's name. To share with users outside your group, enter the user's email address. Click **Add to Share** to add the name to the list.

5. Click **Save** to save your changes and save the document or documents to the folder.

The items will be saved for you to access from the **Folders** link in the **More** drop-down list at the top of the page, or from the **Folders** pod on the Lexis Advance® home page.

How do I download my results or documents?

You can download documents selected from your results list, or download a document you have open.

Note:



See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on downloading any attachments associated with your delivery.

To do this:

1. Choose whether you want to download a single document, or download the results list:

Option	Description
To download the results list	While viewing your results list, select the documents or specific results you want to download, or don't select any documents to download up to 250 of the top 1,000 results from your list.
To download a single document	While viewing the results list, open the specific document you want to download.

2. Click the drop-down list next to your last-used delivery icon. (For example, if you printed something, the Print icon will appear on the toolbar, with the drop-down arrow next to the icon.)
3. Choose one of the following options from the **Download** group:

Option	Description
Download (current settings) 	Select this option if you want to use the default download options and download the selected documents immediately.
Choose new settings 	Select this option if you want to choose your download options before saving the documents to your computer. Once you select this option, you can complete the download form. For detailed information about completing the form, see Download Page .

Download Page

You can download either your results list or an individual document. To do this, provide the information for each tab of the **Download** dialog box. Details about each item on the dialog box are provided below.

Note:

- Different options may be available depending on what type of document you are downloading.
- To view a list of documents you have already downloaded, select the **History** drop-down list in the global navigation bar and view the **Research Map**. Your document download is shown in the list of your activities (indicated using the type **Download**). Click this **Download** link and choose **Retrieve Items** from the **Actions** list to view your options for retrieving it.

Value	Description
Selected Documents (n) tab	The document titles of the documents you selected to download. If you want to remove any documents before downloading them, you can clear them at this tab.
Basic Options tab	<p>What do you want to download? Select one of the following options, depending on whether you're downloading a results list or documents:</p> <ul style="list-style-type: none"> ■ Full documents for selected results (n) - Select this to download all the documents you selected. <div style="border: 1px dashed orange; padding: 5px; margin: 10px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are downloading. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Attachments only for selected results, where available - If any documents you want to download contain attachments, you can choose to download only those attachments (and not the related documents). ■ The following results from your results list - Select this to download the results list (not the documents themselves), and then enter the specific results you want delivered. You can download up to 250 of the top 1,000 results. ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to download the full profile report. (Once you select this option, you must decide if you want to download just the charts and graphs, or if you want to download charts and graphs and the results list. If you choose to deliver the results list, you can select any number or combination of results up to 250 total.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Document type Select the format in which you would like the documents to be downloaded.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Downloads the documents in .pdf document. Files downloaded in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Downloads the documents in Microsoft Word 2007 format.¹ ■ WordPerfect-compatible (.WP) - Downloads the document in WordPerfect-compatible format. ■ LexisNexis® CaseMap - Downloads the documents in LexisNexis® CaseMap format.

Note:

If you are downloading documents in CaseMap format, any attachments associated with the documents will be ignored, even if you select to include attachments with the download.

When downloading multiple documents

Select one of the following options:

- **Group and save documents as a single file** - Select this to format all the documents you selected into a single file.
- **Save as individual files** - Select this to format each document you selected in separate files.

Compress files in .ZIP format

Select this check box if you want to download the files in a compressed (ZIP) file format.

Tip:

Compressed files take up less space on your computer's local drive. Files saved in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.

Filename

Enter a filename for the downloaded file.

Formatting Options tab

Include the following in the delivered document:

- **Cover page** - Select this if you want an introductory cover page as the first page in your document.
- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your downloaded document.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

Tip:

The **Times New Roman** font is best for cases, statutory materials, and any long documents that are typically read in printed form. **Courier** is best for tables and other types of content that don't display well with varying font widths.

Font size

Select the desired font size for your documents.

	<p>Line spacing Choose either single or double spacing for your documents.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ Double-spacing is not recommended for documents using dual column format. ■ Double-spacing is not applied to tables, case citations, or spreadsheets. <p>Styling</p> <ul style="list-style-type: none"> ■ Bold search terms - Select this if you want pagination to appear in bold type in your documents. ■ Italicize search terms - Select this if you want your search terms to appear in italic type in your documents. ■ Underline search terms - Select this if you want your search terms underlined. ■ Bold reporter page numbers - Select this if you want page numbers from the associated reporter to appear in bold type.
Content-Specific Options tab	<p>Statutes Select Include annotations to include any annotations that are associated with the statutes.</p> <p>Deliver full case document Select this option to deliver the full case document, along with the following options:</p> <ul style="list-style-type: none"> ■ Show Shepard's Signal™ indicators - Select this to include the <i>Shepard's</i> Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law". ■ Show Headnotes - Select this to include the headnotes for the case with each document. ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column.
Download	Click this to download your documents.
Cancel	Click this to return to your search results without downloading your documents.

¹ Once the document is saved to disk and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.

How do I email my results or documents?

You can email documents selected from your results list, or a document you have open, to yourself or others.


Note:

See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on emailing any attachments associated with your delivery.

To do this:

1. Choose whether you want to email a single document, or email the results list:

Option	Description
To email the results list	While viewing your results list, select the documents or specific results you want to email, or don't select any documents to email up to 250 of the top 1,000 results from your list.
To email a single document	While viewing the results list, open the specific document you want to email.

2. Click the delivery icon drop-down list in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose **Email** () from the list of options.
4. Complete the email form and select **Email**. For detailed information about completing the form, see [email documents page](#).

Email Page

You can email either your results list or an individual document. To do this, provide the information for each tab of the **Email** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are emailing.

Value	Description
Selected Documents (n) tab	Lists the document titles of the documents you selected to email. If you want to remove any documents from the email delivery, you can clear them at this tab.
Basic Options tab	<p>What do you want to email? Select one of the following options, depending on whether you're viewing a results list or a specific document:</p> <ul style="list-style-type: none"> ■ Full documents for selected results (n) - Select this to email all the documents you selected. <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are emailing. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> <ul style="list-style-type: none"> ■ Attachments only for selected results, where available - If any documents you want to email contain attachments, you can choose to email only those attachments (and not the related documents). ■ The following results from your results list - Select this to email the results list (not the documents themselves), and then enter the specific results you want delivered. You can email up to 250 of the top 1,000 results. ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to email the full profile report. (Once you select this option, you must decide if you want to email just the charts and graphs, or if you want to email charts and graphs and the results list. If you choose to deliver the results list, you can select any number or combination of results up to 250 total.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) ■ Include document attachments, where available - If any of the documents you want to email contain attachments, you can include those attachments in the delivery. (If you want to email <i>just</i> attachments, select the Attachments only for selected results, where available option, above.) <p>Document type Select the format in which you would like the documents to be emailed.</p> <p>Note: If you are emailing attachments, they will be delivered in their native format and the following options will not be applicable.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Emails the documents in a single .pdf document. Files downloaded in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Emails the documents in Microsoft Word 2007 format.¹

- **WordPerfect-compatible (.WP)** - Emails the document in WordPerfect-compatible format.
- **LexisNexis® CaseMap** - Emails the documents in LexisNexis® CaseMap format.

Note:

If you are emailing documents in CaseMap format, any attachments associated with the documents will be ignored, even if you select to include attachments with the email message.

When attaching multiple documents

Select one of the following options:

- **Group and save documents as a single file** - Select this to format all the documents you selected into a single file.
- **Save as individual files** - Select this to format each document you selected in separate files.

Compress files in .ZIP format

Select this check box if you want to send the files in a compressed (ZIP) file format.

Tip:

Why would you choose to compress your files? Some email servers are unable to accept large file sizes, so smaller, compressed files are more likely to be received. Additionally, compressed files take up less space in the recipient's mailbox. Finally, when downloading, compressed files take up less space on your computer's local drive. Files sent in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.

Filename

Specifies the name associated with the emailed file. You can accept the default or change it.

To

Enter up to 5 recipients' email addresses, separated by a semicolon (;).

Subject

Enter the text you want to appear on the subject line of the email.

Notes

Enter any notes you want to appear in the body of the email, above the document text. You can use the associated options to apply bold, italic, or underline formatting to text in the note.

Formatting Options tab

Include the following in the delivered document:

- **Cover page** - Select this if you want an introductory cover page as the first page in your document.
- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your document attachment.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).

- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

Tip:

The **Times New Roman** font is best for cases, statutory materials, and any long documents that are typically read in printed form. **Courier** is best for tables and other types of content that don't display well with varying font widths.

Font size

Select the desired font size for your documents.

Line spacing

Choose either single or double spacing for your documents.

Note:

- Double-spacing is not recommended for documents using dual column format.
- Double-spacing is not applied to tables, case citations, or spreadsheets.

Styling

- **Bold search terms** - Select this if you want pagination to appear in bold type in your documents.
- **Italicize search terms** - Select this if you want your search terms to appear in italic type in your documents.
- **Underline search terms** - Select this if you want your search terms underlined.
- **Bold reporter page numbers** - Select this if you want page numbers from the associated reporter to appear in bold type.

Content-Specific Options tab

Statutes

Select **Include annotations** to include any annotations that are associated with the statutes.

Deliver full case document

Select this option to deliver the full case document, along with the following options:

- **Show Shepard's Signal™ indicators** - Select this to include the *Shepard's* Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law".
- **Show Headnotes** - Select this to include the headnotes for the case with each document.
- **Show Core Terms** - Select this to include the core terms for the case with each document.
- **Show Case Summary** - Select this to include the case summary with each document.

Deliver Case Summary only

Choose this option to deliver only the case summary.

Note:

If no case summary for a delivered document exists, the document will be delivered instead.

	<p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none">■ Dual - Select this to save case law documents in dual column format.■ Single - Select this to save documents formatted in a single column.
Email	Click this to email your documents.
Cancel	Click this to return to your search results without emailing your documents.

¹ Once the document is saved to disk and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.

How do I print my results or documents?

Lexis Advance® allows you to print PDF versions of any document you have open, or selected documents from a results list.

Note:



See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on printing any attachments associated with your delivery.

To do this:

1. Choose whether you want to print a single document, or print the results list:

Option	Description
To print the results list	While viewing your results list, select the documents or specific results you want to print, or don't select any documents to print up to 250 of the top 1,000 results from your list. Note: When you select multiple documents this way, Lexis Advance will group them in a single PDF file for printing.
To print a single document	While viewing the results list, open the specific document you want to print.

2. Click the delivery icon drop-down list in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose one of the following options from the **Print** group:

Option	Description
Print (current settings) 	Select this option if you want to use the default printing options and print the selected documents immediately. When available, the last-used printer name is listed along with the option.
Choose new settings 	Select this option if you want to choose your printing options before printing the documents. Once you select this option, you can complete the printing form. For detailed information about completing the form, see Print Page .

Note:

Depending on your default printer selection, you may be prompted with other options for delivering the document. For example, if you have specified Microsoft XPS Document Writer as your default printer, you will be prompted to save the document, which you can then print.

Print Page

Caution:

To have documents automatically printed when using Internet Explorer 8, you must first install Adobe Reader. Visit <https://get.adobe.com/reader/> to download the latest version.

You can print either your results list or an individual document. To do this, provide the information for each tab of the **Print** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are printing.

Value	Description
Selected Documents (n) tab	The document titles of the documents you selected to print. If you want to remove any documents before printing them, you can clear them at this tab.
Basic Options tab	<p>What do you want to print? Select one of the following options:</p> <ul style="list-style-type: none"> ■ Full documents for selected results (n) - Select this to print all the documents you selected. <div style="border: 1px dashed orange; padding: 5px; margin: 10px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are printing. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Attachments only for selected results, where available - If any documents you want to print contain attachments, you can choose to print only those attachments (and not the related documents). ■ The following results from your results list - Select this to print the results list (not the documents themselves), and then enter the specific results you want delivered. You can download up to 250 of the top 1,000 results. ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to print the full profile report. (Once you select this option, you must decide if you want to print just the charts and graphs, or if you want to print charts and graphs and the results list. If you choose to deliver the results list, you can select any number or combination of results up to 250 total.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Printer type Select one of the following options:</p> <div style="border: 1px dashed orange; padding: 5px; margin: 10px 0;"> <p>Note: Depending on your default printer selection, you may be prompted with other options for delivering the document. For example, if you have specified Microsoft XPS Document Writer as your default printer, you will be prompted to save the document, which you can then print.</p> </div> <ul style="list-style-type: none"> ■ Attached printer - The documents will be printed on your attached printer. ■ LexisNexis® printer - The document will be printed using the LexisNexis print utility, which streamlines the print and download request process.
Formatting Options tab	<p>Include the following in the delivered document:</p> <ul style="list-style-type: none"> ■ Cover page - Select this if you want an introductory cover page as the first page in your document.

- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your printed document attachment.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

- Tip:

The **Times New Roman** font is best for cases, statutory materials, and any long documents that are typically read in printed form. **Courier** is best for tables and other types of content that don't display well with varying font widths.

Font size

Select the desired font size for your documents.

Line spacing

Choose either single or double spacing for your documents.

- Note:

- Double-spacing is not recommended for documents using dual column format.
- Double-spacing is not applied to tables, case citations, or spreadsheets.

Styling

- **Bold search terms** - Select this if you want pagination to appear in bold type in your documents.
- **Italicize search terms** - Select this if you want your search terms to appear in italic type in your documents.
- **Underline search terms** - Select this if you want your search terms underlined.
- **Bold reporter page numbers** - Select this if you want page numbers from the associated reporter to appear in bold type.

Content-Specific Options tab

Statutes

Select **Include annotations** to include any annotations that are associated with the statutes.

Deliver full case document

Select this option to deliver the full case document, along with the following options:

- **Show Shepard's Signal™ indicators** - Select this to include the *Shepard's* Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law".

	<ul style="list-style-type: none"> ■ Show Headnotes - Select this to include the headnotes for the case with each document. ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <div style="border: 1px dashed orange; padding: 5px;"> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> </div> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column.
Print	Click this to print your documents.
Cancel	Click this to return to your search results without printing your documents.

How do I send my results or documents to Dropbox?


Lexis Advance® allows you to send either documents you have open, or selected documents from a results list, to Dropbox, which is a third-party cloud storage application. (If you do not have a Dropbox account, visit www.dropbox.com to create a free account, or [take a Dropbox tour](#).)

To do this:

1. Choose whether you want to send a single document to Dropbox, or send the results list:

Option	Description
To send either specific documents or results list to Dropbox	While viewing your results list, select the documents or specific results you want to send to Dropbox, or don't select any documents to send up to 250 of the top 1,000 results from your list.
To send a single document to Dropbox	While viewing the results list, open the specific document you want to send.

2. Click the delivery icon in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose one of the following options:

Option	Description
Send to Dropbox (current settings) 	Select this option if you want to use the last-used Dropbox options and send the selected documents immediately.
Send to Dropbox (choose new settings)	Select this option if you want to choose your Dropbox delivery options before sending the documents. Once you select this option, you will be guided through the Dropbox sign-in and delivery process. Follow the on-screen prompts to complete these steps. For detailed information about completing the form, see Send to Dropbox Page .

Note:

See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on including attachments with your delivery to Dropbox.

Send to Dropbox Page

Note:

To send documents to Dropbox, you must first set up a Dropbox account (if you have not done so already). Visit www.dropbox.com to create a free account, or [take a Dropbox tour](#).

You can send either your results list or an individual document to Dropbox. To do this, provide the information for each tab of the **Send to Dropbox** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are sending to Dropbox.

Value	Description
Selected Documents (<i>n</i>) tab	The document titles of the documents you selected to send to Dropbox. If you want to remove any documents before sending them, you can clear them at this tab.
Basic Options tab	<p>What do you want to send to Dropbox? Select one of the following options:</p> <ul style="list-style-type: none"> ■ Full documents for selected results (n) - Select this to send all the documents you selected to Dropbox. <div style="border: 1px dashed orange; padding: 5px; margin: 5px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are sending. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Attachments only for selected results, where available - If any documents you want to send contain attachments, you can choose to send only those attachments (and not the related documents). ■ The following results from your results list - Select this to save the results list (not the documents themselves), and then enter the specific results you want saved to Dropbox. You can save up to 250 of the top 1,000 results. ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to send the full profile report. (Once you select this option, you must decide if you want to send just the charts and graphs, or if you want to send charts and graphs and the results list. If you choose to deliver the results list, you can select any number or combination of results up to 250 total.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Document type Select the format in which you would like the documents to be sent to Dropbox.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Sends the documents in .pdf document. Files sent in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Sends the documents in Microsoft Word 2007 format.¹ ■ WordPerfect-compatible (.WP) - Sends the document in WordPerfect-compatible format. <p>When sending multiple documents to Dropbox Select one of the following options:</p> <ul style="list-style-type: none"> ■ Group and save documents as a single file - Select this to format all the documents you selected into a single file.

	<ul style="list-style-type: none"> ■ Save as individual files - Select this to format each document you selected in separate files. <p>Compress files in .ZIP format Select this check box if you want to send the files to Dropbox in a compressed (ZIP) file format.</p> <p>Tip: Compressed files take up less space on your computer's local drive. Files saved in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.</p> <p>Filename Enter a filename for the saved file.</p> <p>Dropbox Account Shows the sign-in information you've used to link Lexis Advance to your Dropbox account. If you have not yet established this connection, please finish completing the Send to Dropbox form you are currently working on and click Send to initiate access. To sign in as a different user, select Sign in as a different user and click Send to initiate access.</p>
Formatting Options tab	<p>Include the following in the delivered document:</p> <ul style="list-style-type: none"> ■ Cover page - Select this if you want an introductory cover page as the first page in your document. ■ LexisNexis® logo - Select this if you want LexisNexis® branding in your document attachment. ■ First and last name on cover page and within footer - Select this to include both your first name and last name on the cover page and in the footer of your documents. ■ Page numbering in document - Select a position for the page number from the related options. ■ Embedded references as links - Select to embed citations and other references within the document and hyperlink them. (Select Italicize embedded legal citations if you want the embedded legal cites to appear in italic type in your documents). ■ Users' annotations, highlights, and notes - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you). <p>Font type Select the font to use in your documents.</p> <p>Tip: The Times New Roman font is best for cases, statutory materials, and any long documents that are typically read in printed form. Courier is best for tables and other types of content that don't display well with varying font widths.</p> <p>Font size Select the desired font size for your documents.</p> <p>Line spacing Choose either single or double spacing for your documents.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ Double-spacing is not recommended for documents using dual column format.

	<ul style="list-style-type: none"> ■ Double-spacing is not applied to tables, case citations, or spreadsheets. <p>Styling</p> <ul style="list-style-type: none"> ■ Bold search terms - Select this if you want pagination to appear in bold type in your documents. ■ Italicize search terms - Select this if you want your search terms to appear in italic type in your documents. ■ Underline search terms - Select this if you want your search terms underlined. ■ Bold reporter page numbers - Select this if you want page numbers from the associated reporter to appear in bold type.
Content-Specific Options tab	<p>Statutes Select Include annotations to include any annotations that are associated with the statutes.</p> <p>Deliver full case document Select this option to deliver the full case document, along with the following options:</p> <ul style="list-style-type: none"> ■ Show Shepard's Signal™ indicators - Select this to include the <i>Shepard's</i> Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law". ■ Show Headnotes - Select this to include the headnotes for the case with each document. ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column.
Send	Click this to send your documents to Dropbox.
Cancel	Click this to return to your search results without sending your documents to Dropbox.

¹ Once the document is saved and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.





How do I download, print, email, and send to Dropbox the document attachments associated with my results?

When downloading, printing, emailing, or sending to Dropbox documents that have attachments, you can choose to deliver *only* those attachments, or just include them with their associated documents.

To do this:

1. Select the document or results list you want to deliver (download, print, email, or send to Dropbox):

Option	Description
To deliver the results list	While viewing your results list, select the documents you want to deliver (or don't select any results to deliver the full list of results).
To deliver a single document	While viewing the results list, open the specific document you want to deliver.

2. Click the delivery icon for the task you want to perform from the delivery drop-down list. (For example, click one of the following icons: **Download** () , **Print** () , **Email** () or **Send to Dropbox** ()). A drop-down list of options appears.
3. Choose **Choose new settings**. The appropriate delivery dialog box appears.
4. Click the **Basic Options** tab. The view changes to show your options for delivering your research.
5. In the **What do you want to download/print/email/send to Dropbox?** group, select one of the following options, depending on whether you want to deliver documents with their attachments or just attachments:
 - **Full documents for selected results**, followed by **Include document attachments, where available** - Select these options to deliver the documents along with any attachments associated with the documents.
 - **Attachments only for selected results, where available** - Select this option to deliver just the attachments for the documents or results you are viewing.
6. Select any other delivery-related options you want and complete the delivery.

How do I create an alert?

You can create an alert, which is a search that runs automatically and notifies you of any results. You can specify how often the alert is run.

Tip:

To get the best, on-target alert results, refine your search before saving it as an alert. Here are some suggestions:

- Use search terms that are specific to your research, joined by connectors to define the relationships of the search terms. For example, `medical negligence or clinical negligence`
- Avoid terms that are too general, such as `illness` or `behavior`.
- Filter your results before creating your alert. On the results page, select from the filters in the left pane to specify the jurisdiction, time frame, practice area, and so on, that you want to focus on.

To create an alert:

1. Run a search or *Shepardize*® a citation.
2. When you have the results you want, complete one of the following steps:
 - From your search results, select the alert icon (🔔) above your results.
 - From a *Shepard's*® report, select the alert icon (🔔).

The Alert dialog box appears.

3. Provide the information required on the form. (Using this form, you can specify how often you want to be notified of any results, how you want to receive the results, and other options.)

You can review all of your alerts by choosing the **View all alerts** in the **Alerts** pod on the Lexis Advance® home page. You can also choose **Alerts** from the **More** drop-down list, located at the top of any page.

How do I view the results of an alert?

After you've created an alert, you can view the results of any searches that alert performs for you.

To view your results:

- Do one of the following:
 - On the Lexis Advance® home page, select the **View all alerts** link in the **Alerts** pod. The Alerts page appears.
 - Choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:

- When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.
- Once you are viewing your alert results, select the alert name for which you want to view the results.

How do I edit an alert?

You can edit an existing alert and change your selections for the following options:

- Title
- Changes the alert is monitoring for (*Shepard's Alert*® searches only)
- Client
- How you want this citation to be monitored
- How often you want to be notified of any results
- Duration of the alert
- Delivery options
- Sharing options

To edit an alert:

1. While viewing your alerts results list, locate the alert you want to edit.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Click the **Edit** button under the title of the alert. The Alert dialog box appears.
3. Make whatever changes you need and select **Save**.

Note:

See [Edit Alert Page](#) for a description of the options available at this dialog box.

Edit Alert Page

Use this form to edit an existing alert. You can change your selections for these options:

- Title
- Client
- How often you are notified of any results
- Duration of the alert
- Delivery options
- Sharing options

Value	Description
Overview tab	<p>Title Keep the alert name that is displayed, or give it a name that you will use later to retrieve it.</p> <p>Description Enter a description you want to associate with the alert.</p> <p>Search terms Lists the terms that were used in the search.</p> <p>Search type Indicates that this is a search alert.</p> <p>Client Either select Recent client and choose a client you've recently used from the drop-down list, or select New client to enter the name of a new client.</p> <p>Note Enter a personal note you want to associate with the alert.</p>
Monitor tab	<p>Category Indicates which content types the alert will monitor for new documents. Select the content types you want the alert to monitor. The content types displayed are the ones you selected when you searched, plus your Narrowed By items from your results.</p> <p>Select all / Clear all Use these options to select or clear all categories at once.</p>
Deliver tab	<p>Duration Enter dates in the Start and End boxes (or select from the calendars) to indicate how long you want this alert to run.</p> <p>Delivery Type You can choose online-only delivery or email and online delivery. If you select email, enter your Email address and in the Delivery format group, choose whether you want the email to be delivered in HTML or text format.</p> <p>Frequency Select how often you want to be notified of any results.</p> <p>Note: Between notifications, you can go online at any time to view your results.</p> <p>Daily Each day of the week.</p> <p>Business daily Each day from Monday through Friday.</p> <p>Weekly Once a week, on the day you select.</p>

	<p>Monthly Once a month, on the date you select. If the date doesn't occur in a certain month, you will receive notification of any results on the first day of the following month. For example, if you select 30, you will be notified on March 1, because there is no 30th day in February.</p>
Share tab	<p>Enter a user's name (using the format of last name, first name), or enter the user's email address.</p> <p>To share the alert with other users in your organization, type the user's first name or last name. The alert will be shared immediately with him or her. To share the alert with users who are not part of your organization, type the user's email address. Outside recipients will need to accept the invitation to view the alert.</p> <p>Added contacts / Shared with The list of users with whom you have shared this alert.</p>

How do I delete an alert?

You can delete an alert you no longer want to run. When you delete an alert, you will no longer receive notifications about it and it will be removed from your list of alerts.

To do this:

1. On the Lexis Advance® Home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:



When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the list of alerts, locate and select the alert you want to delete.
3. Select the **Delete** icon (✕) in the toolbar above the alerts list. The Delete Alerts dialog box appears.
4. Confirm you want to delete the alert by selecting **Delete Alert**.

How do I share a new alert with other users?

You can share new alerts you've created with other users.

To do this:

1. Run your search and review the results.
2. Click the alert icon  at the top of your results. The Alert dialog box appears.
3. Select the options you want from the **Monitor** and **Deliver** tabs.
4. Click the **Share** tab.
5. Enter a user's first or last name or email address to find it in the list and select **Add to Share** to add it to the added contacts list.
6. If you need to remove any users from the Added Contacts list, select the  associated with the contact.
7. Click **Create Alert**.

The users you have shared with will be notified by email, and will find the document in the **Shared by others** group of the left-side pane. You will find the document in the **Shared by me** group.


How do I share an existing alert with other users?

You can share an existing alert with other users.

To do this:

1. Do one of the following:
 - On the Lexis Advance® home page, select the **View all alerts** link in the **Alerts** pod.
 - Choose **Alerts** from the **More** drop-down list at the top of any page.

The Alerts page appears

2. Locate the alert you want to share and select **Edit**.
3. Click the **Share** tab.
4. Enter a user's first or last name or email address to find it in the list and select **Add to Share** to add it to the added contacts list.
5. If you need to remove any users from the Added Contacts list, select the  associated with the contact.
6. Click **Save**.

The users you have shared with will be notified by email, and will find the document in the **Shared by others** group of the left-side pane. You'll find the document in the **Shared by me** group.

How do I update a *Shepard's Alert*®?

Note:


Only *Shepard's Alert*® searches can be updated manually. Search alerts are updated automatically according to the update schedule you set up when you created the alert.

You can update, or run, a *Shepard's Alert*® to check for changes in between dates it is scheduled to run automatically. To update an alert:

1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** pod, or select the **Alerts** link from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Locate the alert you want to update.
3. Select the **Update Now** button () under the title of the alert you want to update.
4. When the **Update Shepard's Alert** box appears, select **Update Now**.

How do I pause an alert?

You can temporarily stop an alert and start it again later. If you pause an alert, you won't receive notifications about it during the period it is paused. Details for paused alerts are shown in grayed-out text in your list of alerts.

To pause an alert:

1. On the Lexis Advance® home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the list of alerts, locate and select the alert you want to pause.
3. Click the **Pause** icon (||) in the toolbar above the alerts list. The Pause Alerts dialog box appears.
4. Confirm you want to temporarily pause the alert by selecting **Pause**.

How do I restart an alert?

You can restart an alert you have paused to begin receiving notifications about it again. You can also start a new alert you've created using an existing alert.

To do this:

1. On the Lexis Advance® home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Do one of the following:
 - Click the **Start** icon under the title of the alert you want to restart.
 - Select the alert you want to start, and then select the **Start** icon (▶) in the toolbar above the results list.

The Start Alert dialog box appears.

3. Review the information in the dialog box and select **Start**.

How do I find a specific alert?

You can search your saved alerts to find a particular alert, search terms, or other words or phrases.

To search your alerts:

1. Choose **Alerts** from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the **Search Within Alerts** box at the top left of the page, type the words you want to search for and select **Search**. For example, you can enter the name (or part of the name) of an alert, a term or terms from a previous search, a client ID, and so on. Your results list is filtered to show only those results that contain the term on which you searched.

Note:

To return to the alerts page you were viewing prior to your search, select the **Clear search** link, located near the top of the page.

What is the history feature?

You can quickly resume your work from past research sessions using the Lexis Advance® history feature. Your searches, search terms, documents, deliveries, and other activities are automatically saved in the history for up to 90 days. You can display your research history in a list view or a graphic ("map") view. You can access history by selecting **History** at the top of any page, and then selecting a specific search or other item from the list, or **View all history** or **Research Map**. Or, on the Lexis Advance home page, select the **History** pod, then select a specific item, or select **View all history** or **Research Map** at the bottom.

Note:

For Public Records, you can only find items in history for up to 10 days.

Your last 5 searches are listed on the **History** pod on the home page. Select a search to display the results for it, or select **View all history** to display your searches from the last 90 days.

To save any of these activities for an unlimited time, create a folder in which to store them. See "Saving Research to Work Folders" in the Help for details.


How do I find an item in my history?

You can search your history to find a previous search or search terms, a document from your results, a page you printed, or any other activity from up to the last 90 days.

Note:

For Public Records, you can only find items in history for up to 10 days.

To do this:

1. Take one of the following actions:
 - On the Lexis Advance® home page, select the **History** pod, then select **Research Map** at the bottom of the pod.
 - From **History** at the top of any page, select **Research Map**.
2. In the **Search Within History** box that appears at the top left of the page, type the words you want to search for. You can enter the name (or part of the name) of a document, a document citation, a term (or terms) from a previous search, a matter ID, and so on.
3. Select the search icon (). The system displays your results.
4. To return to the history page you were viewing before searching your history, select **Clear search** above your results.

What is Lexis Practice Advisor® ?

Lexis Practice Advisor® is an easy-to-use, intuitive practical guidance product that brings together key information and tools for attorneys who handle transactional matters.

Lexis Practice Advisor

Lexis Practice Advisor provides users with a range of valuable features, including:

- Relevant, practical forms and other content built to meet the needs of attorneys who handle transactional matters
- Newly added content for selected practice areas listed in the Updates in... pane
- A Recently Browsed Documents pane listing recent content activity
- The **Editors' Picks** pane, containing content our contributing experts recommend
- Access to the latest news and information from all relevant practice areas in the **Law 360 Headlines** pane
- Related topics that appear in the Topic pane on the left, and a search box at the top of the page

External Resources

Meet our Authors

The Lexis Practice Advisor *Meet Our Authors* feature allows you to access information about the firms and legal experts who provide our practical guidance and targeted, relevant legal content.

Lexis® Market Tracker

Lexis® Market Tracker searches all the legal documents filed for the purchase of corporations in the United States, so you can find information about recent developments in a particular industry or about a single sale. You can locate digital copies of the original documents for sales, closing contracts, financing, etc., then search those documents for a specific name or phrase.

What is LexisNexis® Litigation Profile Suite?

During the litigation process, you must often identify relevant information about the parties involved in a case, including expert witnesses, judges, and attorneys. Using LexisNexis® Litigation Profile Suite, you can search for a specific person or you can search for specific *details* about the person. (For example, if you are searching for an expert witness, you can search for an area of expertise, which can help you locate potential experts most closely associated with your case subject.) Once you locate the profile for which you are searching, you can view specific details about that person, such as cases in which he or she has been involved, rulings, and so forth. You can use this profile data to help you as you develop a case strategy.

Litigation Profile Suite retrieves profiles from several types of content sources:

- Expert Witness Profiles
- Judge Profiles
- Attorney Profiles

What is LexisNexis® MedMal Navigator®?

LexisNexis® MedMal Navigator® is a customizable dashboard to help you complete medical and legal research. To start populating the dashboard, you'll need to select a medical topic.

Consider these points in using MedMal Navigator®:

- Answer questions in the research assistant to populate the results, then select **Next Question** to submit your answer.
- The Answered Questions pane allows you to review and change answers you've already provided. Select **Previous Answers** and change any answers in the drop-down list, then select **OK** to return to the questionnaire.
- The Upcoming Questions list lets you skip the question offered in the research assistant and choose a new direction for your research. Select the **Upcoming Questions** button, find the question you want to answer, and select **Answer This Question**.
- The **Why is this important?** annotation provides more information about a given question in the research assistant. Some annotations will also include links to documents with more information.

The pod names and their descriptions follow:

Pod Name	Description	How Does It Work?
View all Medical Topics	Over 100 of the most commonly litigated medical malpractice topics appear on the MedMal Navigator® home page. You can use all the MedMal Navigator® tools to research these topics. If you can't find what you're looking for among these topics, you can use the Medical Topics page to search for your topic. This page covers over 800 medical topics.	To access this page, select View All Medical Topics at the top of the home page. The Medical Topics page appears. You can search for a medical topic by using the search box to the left of the page. If you prefer, you can browse the available topics alphabetically.
Case Value Assessment	Helps attorneys evaluate the risk of prosecuting or defending a case by comparing the facts of your case to facts from actual verdicts and settlements in our database. At a glance you can see ranges of verdicts in your jurisdiction, and identify which verdicts and settlements most closely match your case. You can select this information for more details and a link out to the case documents.	As you answer questions about your case in the research assistant, an interactive graph will populate with related verdicts and settlements in your jurisdiction. Each verdict or settlement is represented by a circle that fills in as you provide facts that match this case (shown in green), and facts that do not match (shown in orange). Gray areas are facts that you have not yet provided. The graph's X axis organizes results by verdict or settlement amount, with the largest amounts to the right. The graph's Y axis organizes results by how well they match your case, with the best matches at the top. You can select a case by selecting the circle. MedMal highlights the selected circle, and below the chart you will see information about the case. You can see

		<p>documentation for the case by selecting its name.</p> <p>To navigate back to the dashboard, select the Dashboard option at the top of the page.</p>
Standard of Care	<p>The objective of this tool is to help users quickly identify areas where a potential deviation from the standard of care might have occurred so that attorneys can quickly understand the strengths and weaknesses of their case. LexisNexis doctor-editors have scoured the medical guidelines, widely used textbooks, and latest published studies to create an easy-to-follow checklist.</p>	<p>As you answer medical facts about your case, a chart populates on the right side of the page to point out any potential areas where the medical provider may have deviated from the standard of care.</p> <p>A green circle indicates that the fact in your case matches the standard of care, a red circle indicates where the medical provider may have deviated from the standard of care.</p> <p>For more information about a medical fact, select Show Details. This content may include links to medical journal articles or other documents, which will appear if you select them. To collapse the additional details, select Hide Details.</p>
Legal Analysis	<p>In the Legal Analysis tool, the questionnaire technology is used to develop a tailored Lexis Advance® search for the legal issue at hand to get you quickly to precisely the documents you need across all Lexis Advance content types.</p>	<p>In the Legal Analysis tool, you must answer several questions before a search result appears.</p> <p>Once you have answered all the questions, the tool returns a count of all the results matching the search generated by your answers. You can choose a different jurisdiction, add more search terms, or view your results.</p> <p>When you view your results, you can:</p> <ul style="list-style-type: none"> ■ List results by category ■ Search within a selected category ■ Apply post filters to a selected category
Expert Witness	<p>This tool leverages LexisNexis® Litigation Profile Suite to search for and vet expert witnesses.</p>	<p>MedMal Navigator® automatically searches by specialty and geography. You can change those options using the Narrow By tools on the left side of the page. Arrows at the top of the page allow you to browse your results.</p> <p>Once you have found an expert on whom you would like more information, select the</p>

		expert's name to see an Expert Witness profile report.
Research Parties	This tool leverages public records to investigate people or entities in your case.	<p>To add the name of people or entities related to your case (opposing counsel, plaintiff, hospital, insurance company) to the list, select the Add New Party button at the top of the Research Parties list. Fill out the pop-up form that appears, and select the Add Party button.</p> <p>From the list of names, you can perform a public records search by selecting a name. This will open our public records tool, and you can follow the instructions to see the results.</p>
Elsevier's First Consult	The main feature of the Elsevier's First Consult tool is an authoritative medical encyclopedia built by Elsevier Science. This database was written by doctors and nurses for use in hospitals to provide quick, easy-to-understand background on over 800 medical topics.	<p>Based on the topic you have already selected, the Elsevier's First Consult page gives you a list of related topics. If you select a topic, MedMal Navigator® takes you to the article text, with a table of contents in the left navigation bar.</p> <p>If you want to see another related topic, you can select Change Topic to return to the Elsevier's First Consult full topic list.</p>
Medical References	This tool allows you to review all the content available in Lexis Advance® for your selected topic.	<p>When you select this tool, a new page appears, displaying a search result set based on your MedMal Navigator® topic. Lexis Advance includes a large and growing database of medical content, including an expansive collection of medical journals published by Elsevier. By default, this page displays Scientific content, but you can use the navigation tools on the left side of the page to see results for other content types.</p> <p>If you select the Illustrations button at the top of the page, a new page will appear with a new result set, based on your MedMal Navigator® topic and filtered to show only images. Our medical illustrations cover anatomy, physiology, and the onset, diagnosis and treatment of most medical conditions.</p>

What is LexisNexis® Verdict & Settlement Analyzer?

Litigators and general counsel are increasingly involved in evaluating and valuing cases throughout the litigation process. They must understand the likelihood of success and the expected outcome from pursuing litigation as they try to decrease their costs and reduce time spent on the case.

LexisNexis® Verdict & Settlement Analyzer can assist you in assessing and evaluating the level of risk or opportunity associated with a particular case. Specifically, Verdict & Settlement Analyzer examines the outcomes of cases similar to yours and summarizes the results in a series of graphs and charts, which can then be examined more closely for specific verdict information, such as the case topic, specific results, and key players. Having this information early in the case assessment process can help you determine how you want to proceed with a particular case.

What is Lexis Advance® Tax?

Using Lexis Advance® Tax, you can simplify your tax research by conducting a single search across multiple resources, which might include cases, codes, regulations, tax analysis, tax commentary, tax news, and other information required to practice tax law.

Lexis Advance Tax lets you, among other things:

- Review expert analysis and insight with related federal code sections and tax topics in Lexis Tax Advisor - Federal Code Reporter.
- Examine practical analysis of state tax codes and regulations drafted by the top tax professionals by using Lexis State Tax Practice Insights.
- Stay on top of the latest tax news by reviewing headlines from Tax Analysts Tax Notes Today or CCH Federal Tax Weekly.
- Review the Matthew Bender® tax treatise collection, which is written by respected authorities in their field and frequently cited by the IRS and tax courts.
- Easily determine whether relevant laws and IRS Administrative rulings are still valid by using available *Shepard's* Signal™ indicators.

What is *Shepard's*® BriefLink?

Shepard's® BriefLink changes citations in your document to live links to Lexis Advance® materials. Simply upload a document from your desktop or network drive. Next, choose the document type you want emailed, either a Word document or a PDF. *Shepard's* BriefLink creates a new version of the brief with active links to materials on Lexis Advance®. You also have the option to create **Shepardize**® links to updated *Shepard's* reports for your citation, when applicable. The updated brief is emailed to the recipients of your choice.