



LexisNexis®

Lexis Advance®

# LEXIS ADVANCE® QUICK REFERENCE GUIDE

This Guide shows you where to find—and how to use—Lexis Advance® features you’ll use often. Keep this Guide handy for reference.

On the road? Need the facts? You can gain access to Lexis Advance with current smartphones, tablets and laptops at [www.lexisadvance.com](http://www.lexisadvance.com). Lexis Advance screens adapt automatically.

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

The [Lexis Advance Support & Training Site](#) can help you with sign-in issues and update you on new Lexis Advance enhancements.

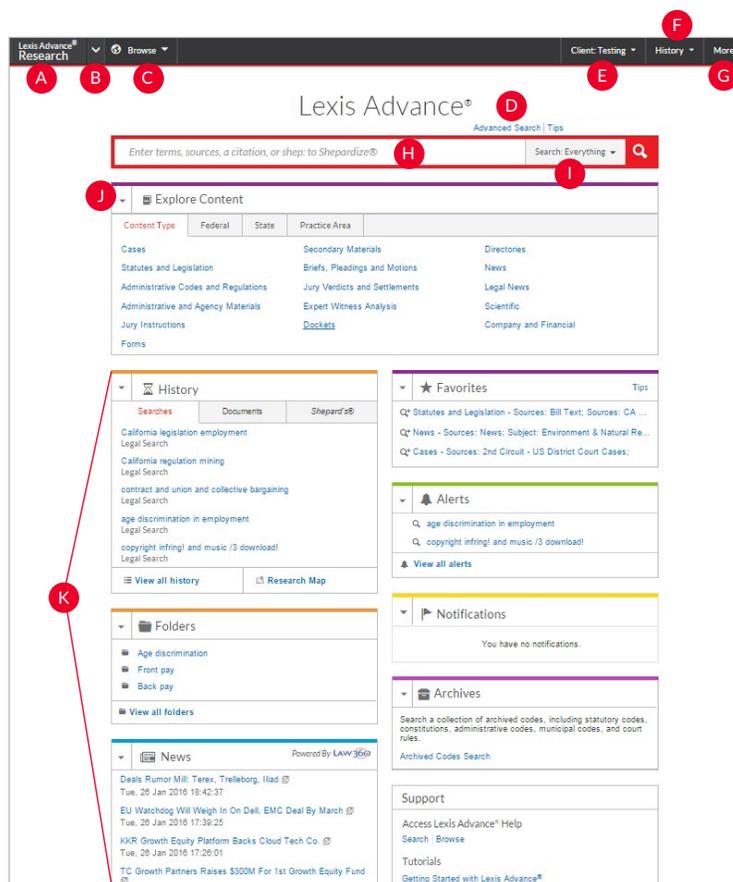
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Please note: All screens shown may change slightly as new sources, features and enhancements are added.

Sign in: [www.lexisadvance.com](http://www.lexisadvance.com) | Learn more: [www.lexisnexis.com/advancesupport](http://www.lexisnexis.com/advancesupport)



## Start your search: home page



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

- A** **Return to the home page.** Click the **Lexis Advance logo** on any screen.
- B** **Access other subscription products.** Click the down arrow for access to your other subscription products, such as LexisNexis® Public Records.
- C** **Browse sources, legal topics or link to practice pages.** Click **Browse**. Select **Sources**, **Legal Topics** or **Practice Pages**. Drill through the hierarchy or search for specific sources or topics. Also find sources via Explore Content. See J.
- D** Move to fill-in-the-blank **search forms** by content type that develop a search for you.
- E** **Change/edit client** matter IDs.
- F** **Return to recent searches** or documents retrieved. Also connect via the History pod below the Red Search Box.
- G** **Link to Settings**, Help, Price Guide, My Lexis™, Sign Out, etc. Also gain access to Folders, Alerts and Notifications. Or use the landing page pods shown on this page.
- H** **Enter your search words, find sources and more with the Red Search Box.**  
Enter a:
  - **natural language** search and click **Search**. No source selection necessary
  - **terms and connectors** search, e.g., americans disabilities /20 alcohol! and click **Search**
  - **citation**, e.g., 800 f2d 111 and click **Search** to retrieve the full-text document as well as search results for that citation

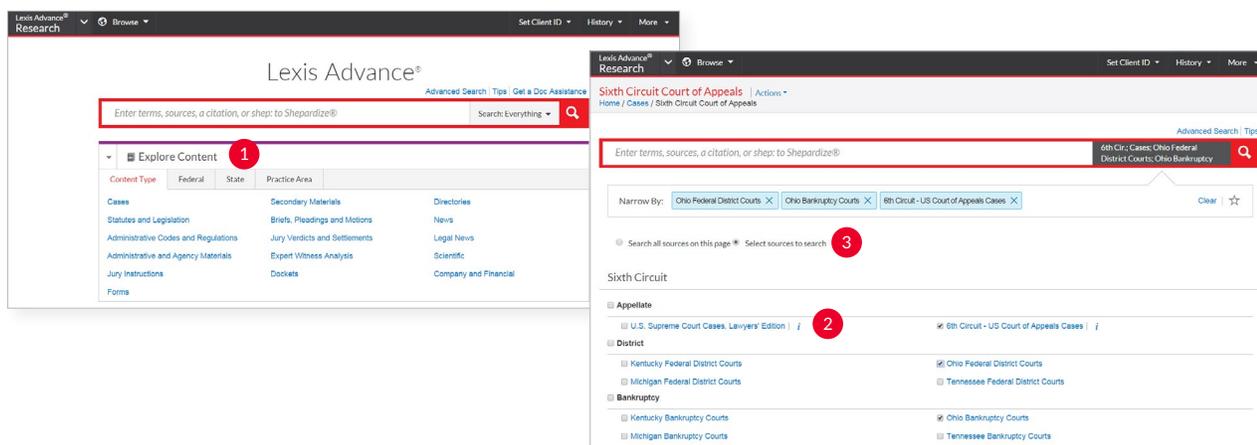
- **partial or full source title**, e.g., Collier, to find a source title to add to your search.
- **popular case name**, e.g., *roe v. wade*, and click **Search** to retrieve the full-text document as well as search results for that case
- **popular statute name**, e.g., *Georgia Lemon Law*, and click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

**As you type, the Red Search Box offers suggested legal phrases, documents or sources.**

- I** **Refine your search up-front and filter** by content, jurisdiction or practice area—or get help with terms & connectors. **Click Filters to re-use recent sources, filters or topics.** You can also filter your **search results**.
- J** **When you know where to look**, use the **Explore Content** pod to navigate by content areas, jurisdiction or practice area and select specific sources or group sources.
- K** **Get there quicker!** Get fast access to favorite sources, Folders, Alerts, Archived Codes and legal topic update notifications (a blue dot means that item has new information). Also get access to **Help topics** and **online tutorials**.



## Start your search: Explore Content to find sources to search



The **Explore Content** pod on the Lexis Advance home page lets you quickly assemble, search and review just the sources you want. Explore source hierarchies by Content Type, by Federal or State jurisdiction or by Practice Area.

- 1 Choose a tab.
- 2 Click through the source hierarchy screens.
- 3 Select a *source* or search *all sources on the screen displayed*. The Red Search Box shows your choices as you select. When you're ready, enter your search words and search.

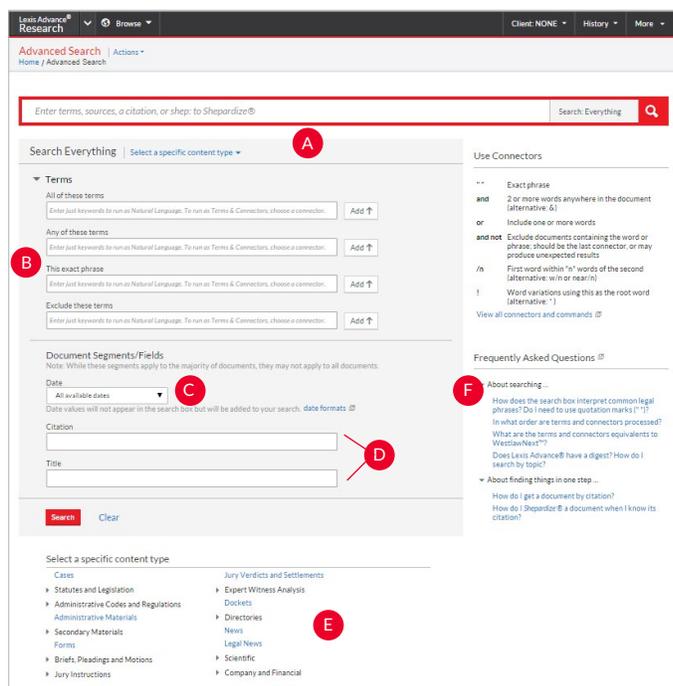
To choose *multiple sources*, select the **Select sources to search** radio button, then select source checkboxes.

To make your combination a *Favorite*, click the star next to the Narrow by box.

## Advanced Search: build a search and search by segment

Select the **Advanced Search** link above the Red Search Box to move to Advanced Search forms.

- A **Your search is built for you!** As you enter words in the fields (see D), the query displays in the Red Search Box.
- B **Search for words** in the entire document. The fields help you use the right connector, e.g., OR or AND. Plus you can ...
- C **Select a date**, e.g., before, after or in between two dates.
- D **Each field is a document segment** or part. Limit your search to specific document parts, if you choose.
- E **Move to another** Advanced Search form. Click the down arrow to open a category of search forms. Or choose the **Select a specific content type** pull-down menu at the top of the form.
- F **Get help** with searches, including search commands. Even find segment examples and answers to frequently asked questions.





## Browse Sources: find specific sources to search

You don't need to select sources before you search at Lexis Advance. But if you want to search specific sources, you can find them via [Explore Content](#) or:

	bankru
Add Source as Filter	Alabama Bankruptcy Cases Asbestos Bankruptcy; Mealey's Litigation Report Collier Bankruptcy Case Update Collier Bankruptcy Practice Guide Collier on Bankruptcy, Sixteenth Edition 10th Circuit - US Bankruptcy Cases 11th Circuit - US Bankruptcy Cases
Documents	bankrupt railroad service preservation and employee protection act of 1982 bankruptcy abuse prevention and consumer protection act of 2005 bankruptcy act of 1800 bankruptcy act of 1841 bankruptcy act of 1898 chandler act (bankruptcy revision) chandler rail bankruptcy act
Legal Phrases	bankruptcy petition bankruptcy cases bankruptcy proceeding bankruptcy rule bankruptcy trustee bankruptcy law federal bankruptcy

If you know the source name or partial name, enter it in the Red Search Box.

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

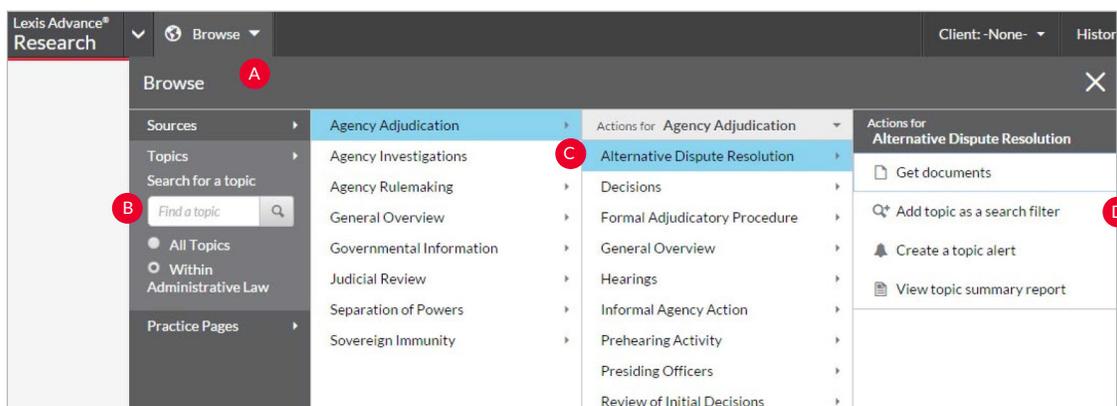
The screenshot shows the Lexis Advance Research interface. At the top, there is a search bar with the text "Enter terms, sources, a citation, or shep: to Shepardize®". Below the search bar, there are several sections: "Sources | Actions", "Search Within Sources" with a search input field, "Narrow By" with a category list, and a list of sources under "A&D Watch". Callouts A through G point to various elements: A points to the "Browse" button, B points to the search input field, C points to the "Category" filter, D points to the alphabetical navigation bar, E points to the "Add source as a search filter" button, F points to the information icon, and G points to the "Add All These as Search Filters" button.

You can also search or browse source listings:

- A** Click **Browse** then select **Sources**. Browse by jurisdiction, content category, practice area and more. Or click **All Sources** to search and browse alphabetically by title.
- B** **Enter a title or partial title**. Suggestions are provided as you type. Click the gray magnifying glass to search.
- C** **Filter sources** by content categories, jurisdictions, etc. Find what you need more quickly by selecting filters, e.g., News, then California.
- D** **Browse sources alphabetically**. Use this bar first to select a letter. Then add content and jurisdiction filters.
- E** **Click a source** link and you can:
  - add the source to your search
  - retrieve all available documents for that source
  - set up an Alert update to get new releases from that source
- F** **Click the information icon** to display the source description with details on content, coverage and update schedule.
- G** Select the **Add All These as Search Filters** button to choose all the sources on the screen to your search.



## Browse Topics: find and search by legal topic

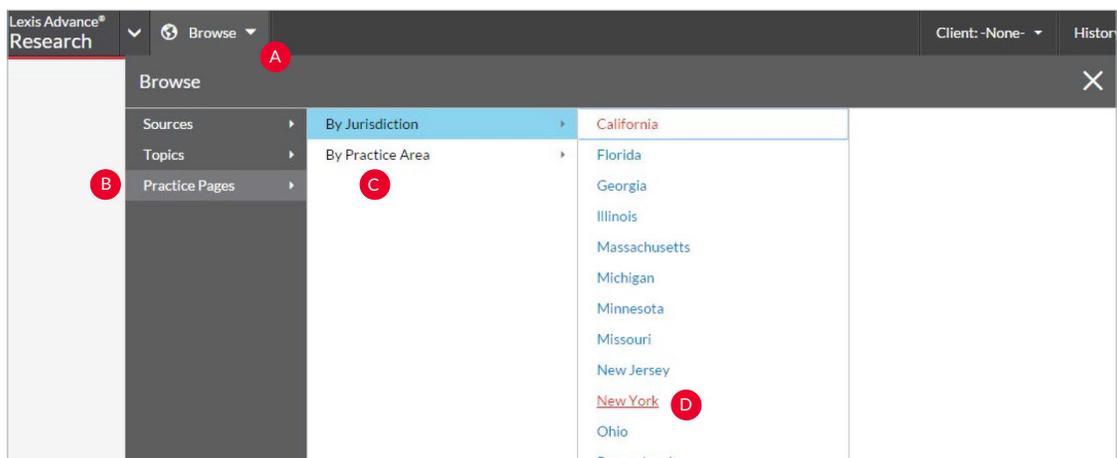


If you prefer to find a legal topic to begin your research, start in Browse Topics. You can also enter this Lexis Advance legal topic hierarchy by selecting a **relevant headnote** in a case you are viewing.

- A** Search for specific topics or browse through the Lexis Advance legal topic hierarchy. Click **Browse** then select **Topics**.
- B** You can search for specific topics. Enter your search words and click **Search**.
- C** Or browse levels of the legal topic hierarchy. Click a **Practice Area** link. Select a topic or use the arrows to open or close additional levels.
- D** Use your topic in your research! Once you choose a topic, you can:
  - Retrieve Lexis Advance search results on this topic, i.e., get relevant cases, legislation, news, dockets, etc.
  - Add it to a search (and add your own search words)
  - Create an Alert on the topic. Your topic Alert will be added to your landing page Alerts pod
  - Some topics give you access to Topic Summary Reports, which offer seminal cases and statutes, secondary sources, details on burden of proof, etc.

## Browse Practice Pages: link to practice/jurisdiction sources

Begin research on specific practice area or jurisdiction pages. Once you find and open a practice page, you can make it your start page that displays after you sign in to **Lexis Advance**.

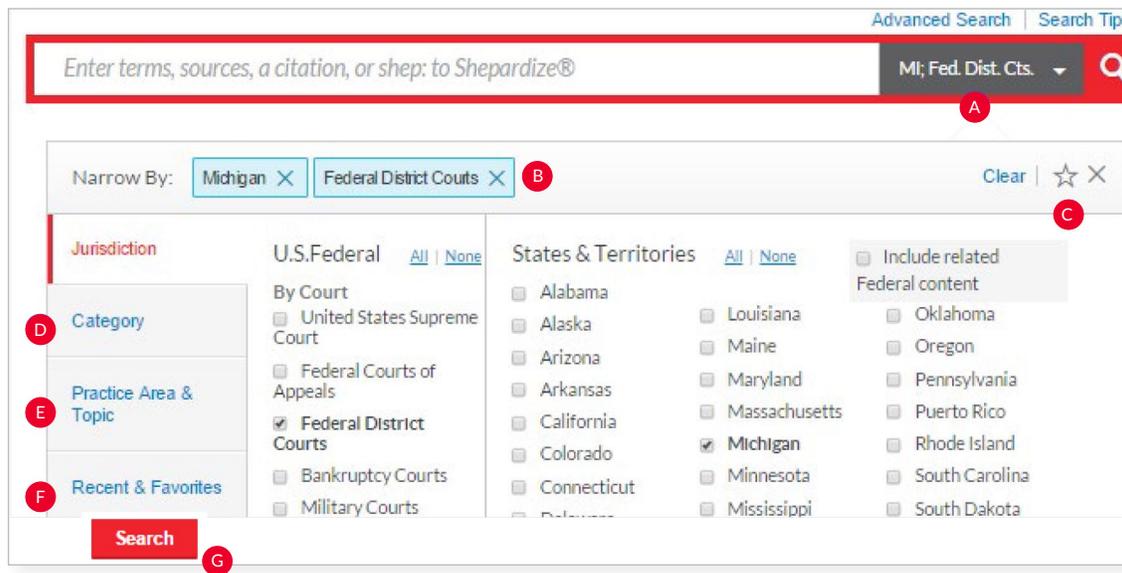


To find a Practice Page:

- A** Click the **Browse** pull-down menu.
- B** Select **Practice Pages**.
- C** Choose **By Practice Area** or **By Jurisdiction**.
- D** Select the **link** to the page you need. Once you open the page, make it your start page. Click the **Actions** pull-down menu next to the page name and select **Make this my research start** page.



## Filter: refine your search up-front and save browsing time



You can filter your [search results](#) to limit the number of documents. But you can also save time up-front and filter before you search, choosing jurisdictions, content categories and/or practice areas.

- A** Click the **Search: Everything (Filters)** pull-down menu to add filters. As you add, the filters box displays your choices.
- B** As you add filters across screens, the **Narrow By** box displays your selections. Click the **X** to delete a choice or **Clear** to remove all choices.
- C** Finished selecting filters? You can **save the combination** as a favorite and re-use. Click the **star**.
- D** **Category** options include all content types available.
- E** **Practice Area & Topic** options include more than 40 practice areas.
- F** **Recent & Favorites** options include up to 50 recent and favorite sources/source combinations, recent and favorite filter combinations, and recent and favorite legal topics selected from Browse Topics.
- G** Click **Search** to close the Filter box.



## Search results: find the most relevant documents fast

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

- A** **Set up an Alert** for your search—across content types, if you choose. Click the **bell** icon next to your search.
  - B** Select **Actions** to add a search to a Folder or expand your search. Or create a link back to this screen of results.
  - C** **See the top relevant results** for each content category. Click **Snapshot**. View the number of results for most content categories.
  - D** **Save to a Folder**. Check the box next to the document title then click **Add to Folder**. Select a **Folder**. When that document appears in future results, it displays the **Saved to Folder** icon . Click the icon for quick Folder access.
  - E** **Print, download or email** without opening documents. Check the box next to your document titles, click the Delivery icon and choose your delivery method—print, download or email. Or create a printer-friendly page of results.
  - F** **Sort documents**. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc.
  - G** **Browse just the titles**. Click on **Title View** to see an efficient list of your results.
  - H** **Keep track of documents viewed**. The **glasses icon** marks documents you viewed over the last 30 days. Hover over the icon to see the last viewed date.
  - I** **Determine relevance**. See your search terms in context to help determine which documents are on point. Hover over the yellow highlighted terms, then click the link to go directly to those terms in the document.
  - J** **Return to prior research tasks**. Click **History** and select a prior search or document.
  - K** **Refine your search—no charge!** Need a smaller, more focused results set? Filter by:
    - **Content category**, e.g., move to statutes, secondary sources and more. Just select a content type
    - **Date**, i.e., slide the timeline or enter dates (not shown)
    - **Adding more words** to your search. Enter them in the **Search within results** box (not shown)
    - **Content options**, e.g., refine cases by attorney/firm, judge, etc. Each category offers different filter options, so you can only filter one content category at a time
- To add filters:** Click a filter link; **it displays under Narrow By**. Remove the filter; just click the X in the blue box. Select and remove multiple filters. Bring up to three preferred jurisdictions or three courts to the top of your filters list; open the Courts filter and click **Edit Settings**.
- Save favorite filter combinations**, e.g., your practice area and jurisdiction, to use again. Click the **star** and save the combination to your Favorites pod on the landing page.



## Snapshot view: view the most relevant results on one screen

The screenshot shows the Lexis Advance Research interface. At the top, the search query is "age discrimination in employment and front pay". The main area is titled "Results for: age discrimination in employment and front pay". On the left, a "Snapshot" sidebar lists various content categories with counts: Cases (1,586), Statutes and Legislation (178), Administrative Codes and Regulations (9), Administrative Materials (229), Secondary Materials (1,234), Forms (32), Briefs, Pleadings and Motions (9,078), Jury Instructions (128), Jury Verdicts and Settlements (196), Expert Witness Analysis (14), Dockets (Get), Directories (0), News (Get), Legal News (112), Scientific (0), Company and Financial (Get), and Web (Get). The main content area is titled "Snapshot (1,586)" and displays two case results. The first result is "Hansard v. Pepsi-Cola Metro. Bottling Co., 865 F.2d 1461" with an "Overview" section. The second result is "McKennon v. Nashville Banner Publ. Co., 513 U.S. 352" with an "Overview" section. A "Jump To" dropdown menu is open, showing a list of content categories: Cases (1,586), Statutes and Legislation (178), Administrative Codes and Regulations (9), Administrative Materials (229), Secondary Materials (1,234), Forms (32), Briefs, Pleadings and Motions (9,078), Jury Instructions (128), Jury Verdicts and Settlements (196), Expert Witness Analysis (14), Dockets, Directories (0), News, Legal News (112), Scientific (0), Company and Financial, and Web.

Save time by browsing the most relevant documents retrieved by your search—in one screen—with the Snapshot View. Save even more time by using the Snapshot View to **deliver multiple documents**, e.g., print or email to colleagues.

- A** **Scroll and view the top three results** by relevance. In the **Snapshot View**, the first four content categories in your search are open to display automatically.
- B** **Deliver or save documents across content categories!** It's fast. Browse and check the boxes of the document you want and click the **Delivery** icon to select **print**, **email** or **download**. Or choose the **Folder** icon. **And save even more time as you deliver.** Quick delivery options let you **bypass dialog boxes**.
- C** **Click a document link** to move to the full-text document.
- D** **Quickly move to a specific type of content.** Use the **Jump To** icon and pull-down list to see a different results section.



## Folders: save documents, select text, searches, etc.

The screenshot shows the Lexis Advance Research interface. At the top, there's a search bar with the text "Enter terms, sources, a citation, or shep: to Shepardize®". Below the search bar, the folder name "Folder: Age discrimination" is displayed. On the left, there's a "Folders" pod with a search box and a "Create New Folder" button. The main area shows a list of documents, including "Nev. Rev. Stat. Ann. § 612.371" and "5 USCS § 5596". Each document entry includes a "Shared by Me" indicator, a "Shepard's Signal™ indicator", and a "Shared with" section. At the bottom right, there's an "Update document" button.

Gain access from the **Folders** pod on the landing page or click the **More** pull-down menu at the top of most Lexis Advance screens and choose Folders.

**Save more than full-text documents.** Copy and save selected document text, search results lists, effective searches and Research Maps from History, Web links, Topic Summary Reports, PDFs, etc., as well as documents from other LexisNexis® products like LexisNexis® Verdict & Settlement Analyzer. Save up to 2,000 items per folder. **Subscription documents stay in Folders** until you remove them. If your organization has the Folder sharing option, you can **share Folder items or entire Folders** and manage access.

- A Add Folder notes.** Click and add up to 4,000 characters.
- B Move, copy or delete Folders.** Click **Actions**. Also **download** the Folder, **rename** it or update all **Shepard's Signal™ indicators**.
- C Find vital facts across all Folders** and notes. Just enter your search terms, e.g., front pay.
- D Use Folder listings/documents.** Check the **box(es)** next to the listing(s). Select the **Delivery icon**, e.g., print. Select the **Move** pull-down menu to **remove** the document from the Folder, **share** or **manage sharing** options (if part of your subscription), and more. Click **X** to move item to the Recycle Bin (see K).
- E Organize Folder documents.** Re-sort by date modified, newest documents, clients, relevance and more.
- F Create a new Folder** or subfolder within a Folder. To create a new Folder in My Folders, click **My Folders** then the **Create Folder** button.
- G Move among your Folders.** Just select a Folder link. Click ▼ to open levels of subfolders. Each Folder shows how many documents it contains. Also see how many documents you've shared or saved for later purchase.
- H Share work folders** with colleagues. Quickly access folders that have been shared within your firm.
- I Click a document listing** link and view the search, filters and sources used to get the document. Retrieve the document or view the text selection. **Add Notes** to the listing. Also **View all** notes for the Folder.
- J Ensure documents are good law.** See immediately when a document was checked via *Shepard's Citations Service*. Update if needed.
- K Documents in the Recycle Bin** are saved for 30 days. Click the Recycle Bin link to review and restore items.
- L Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them.



## Cases: get more than full text

The screenshot displays the Lexis Advance Research interface for the case *Peatros v. Bank of America, 22 Cal. 4th 147*. The interface includes a search bar at the top, a document title bar, and a main content area with a toolbar. A right-hand sidebar provides additional information and tools. A context menu is open over a highlighted section of text.

**Annotations:**

- A:** Save and add the document to a Folder, print, deliver or share. Also request a printer-friendly version.
- B:** Navigate quickly—anywhere in the document. The toolbar displays at the top of your document, and “floats” with you as you move through the text so you can navigate or work without scrolling back to the top.
- C:** Quickly assess relevance of your document. In the Search Document box, enter a specific term to see if the document is on-point.
- D:** Move among results documents. Click Next document or Previous document. Click Results list to move to your results set.
- E:** Create a direct link to quickly and easily share your fulltext document. While scrolling within a document, the title and citation scroll with you, always in view.
- F:** Read in full-screen view. Click the Reading Mode icon to remove navigation elements. Enlarge typeface if you choose. Select the Exit Reading Mode icon to display navigation again.
- G:** Copy the full-case citation for your work. Include parallel citations and a link to the full-text case. Format using a variety of style formats.
- H:** Check the Shepard's status immediately! See possible issues and move directly to the Shepard's report.
- I:** Change pagination. Select a reporter.
- J:** Get more detail on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to search across Lexis Advance.
- K:** Open the original source PDF and other available case documents.
- L:** Come up to speed on the legal topics. Find seminal cases and statutes, relevant secondary sources and details on burden of proof, review standards, etc., for the legal topics covered. Also find orange Topic Summary icons next to LexisNexis® headnotes. Click and link to Topic Summary Reports.
- M:** Find cases that cite to your case as well as the cases cited in your case—for a specific legal point of law. Click Activate Passages. Select a highlighted case passage that represents your issue. Legal Issue Trail opens in a new window.
- N:** Link to full-text documents cited. Just click the link.
- O:** Return to the top of a page, with a single click. While scrolling, click on the Back to the Top arrow.
- P:** Highlight—and use—vital text. When you highlight text, an options box displays. Copy (Quick) lets you select a style format once—and re-use without selecting again. Copy (Advanced) opens a new window with added options, including style. You can also annotate and/or save the text to a Folder; search with the selected text; or highlight important passages. Choose your highlight color, which can be changed or kept the same for subsequent highlighted text. Then save the highlighted document to a Folder.

When you view a full-text case, you also have quick access to other vital case-analysis resources available via Lexis Advance, e.g., *Shepard's* reports, Legal Issue Trail™ and Topic Summary reports.

- A** **Save and add the document** to a Folder, print, deliver or share. Also request a printer-friendly version.
- B** **Navigate quickly—anywhere in the document.** The toolbar displays at the top of your document, and “floats” with you as you move through the text so you can navigate or work without scrolling back to the top.  
**Go to specific document parts**, e.g., opinion or headnotes. Move among **search terms** or **reporter pages**.
- C** **Quickly assess relevance of your document.** In the **Search Document** box, enter a specific term to see if the document is on-point.
- D** **Move among results documents.** Click **Next document** or **Previous document**. Click **Results list** to move to your **results set**.
- E** **Create a direct link** to quickly and easily share your fulltext document. While scrolling within a document, the title and citation scroll with you, always in view.
- F** **Read in full-screen view.** Click the **Reading Mode** icon to remove navigation elements. Enlarge typeface if you choose. Select the **Exit Reading Mode** icon to display navigation again.
- G** **Copy the full-case citation** for your work. Include parallel citations and a link to the full-text case. Format using a variety of style formats.
- H** **Check the *Shepard's* status immediately!** See possible issues and move directly to the *Shepard's* report.
- I** **Change pagination.** Select a reporter.
- J** **Get more detail** on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to **search across Lexis Advance**.
- K** **Open the original source PDF** and other available case documents.
- L** **Come up to speed on the legal topics.** Find **seminal cases and statutes**, relevant secondary sources and details on burden of proof, review standards, etc., for the legal topics covered. Also find orange **Topic Summary** icons next to LexisNexis® headnotes. Click and link to Topic Summary Reports.
- M** **Find cases that cite to your case** as well as the **cases cited in your case**—for a specific legal point of law. Click **Activate Passages**. Select a highlighted case passage that represents your issue. **Legal Issue Trail** opens in a new window.
- N** **Link to full-text documents cited.** Just click the link.
- O** **Return to the top of a page**, with a single click. While scrolling, click on the **Back to the Top** arrow.
- P** **Highlight—and use—vital text.** When you highlight text, an options box displays. **Copy (Quick)** lets you select a style format once—and re-use without selecting again. **Copy (Advanced)** opens a new window with added options, including style. You can also annotate and/or save the text to a Folder; search with the selected text; or highlight important passages. Choose your highlight color, which can be changed or kept the same for subsequent highlighted text. Then save the highlighted document to a Folder.



## Tables of Contents (TOCs): search or browse hierarchical sources

TOCs (Tables of Content) sources are available at Lexis Advance for U.S. and state statutes, constitutions, court rules and administrative codes, plus municipal codes and many treatises, guides and form books.

- A** **Look for the TOC icon** in selected sources. Select a source's TOC icon to browse the TOC, search the full TOC or select specific parts of the TOC to search and/or deliver.
- B** **Search a TOC.** Enter your **search terms** in the Red Search Box.
- C** **Make a TOC chapter into a Favorite** source. Click the **star** to add the chapter or title to those sources you frequently search. Access Favorites on the Home Page.
- D** **Browse a TOC.** Open and close hierarchy levels. Select the **arrow** to open or to close a chapter.

## Indices: search or browse source indices

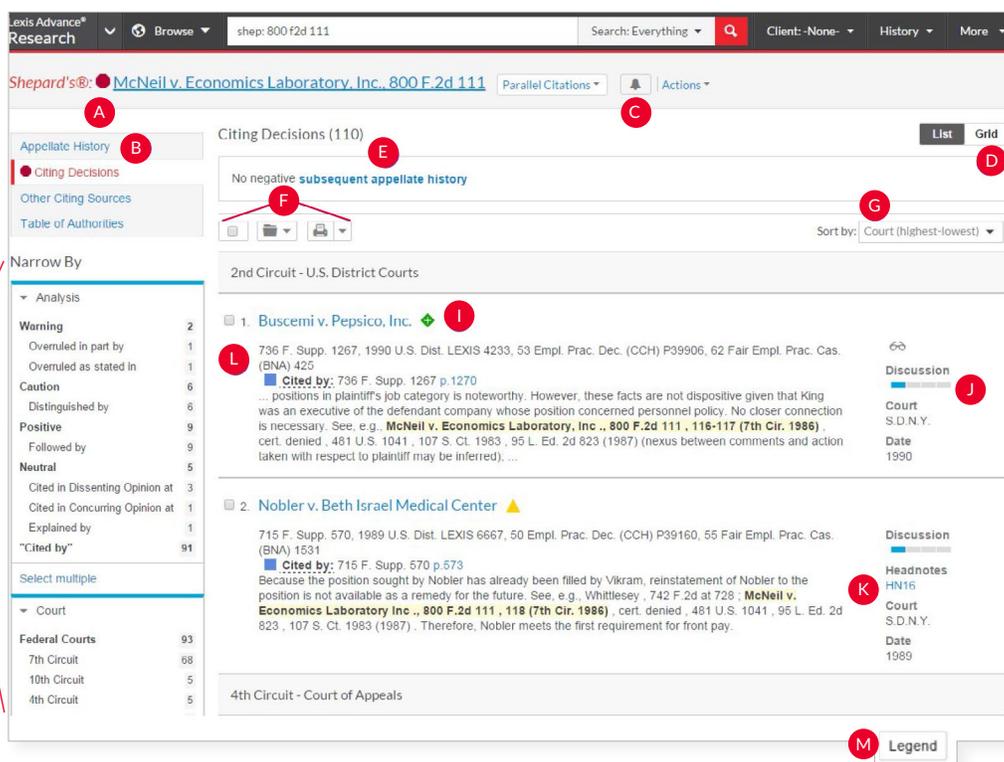
Find the information you need many secondary sources quickly with **back-of-the-book indices**.

Source indices display as a separate source in Explore Content, the Red Search Box (see graphic above left) and the Browse pull-down menu.

Indices operate like TOCs. Open and close levels. Search the full index or parts you select. Link directly to the portion of the full text source that contains your search words. Make part of an index a Favorite source.



# Shepard's® Citations Service



- A** See treatment indicators up-front! *Shepard's* Signal indicators show subsequent treatment at a glance.
- B** Navigate quickly to the *Shepard's* report section that generated the signal:
  - Appellate History
  - subsequent Citing Decisions
  - Other Citing Sources such as treatises or
  - Table of Authorities, which shows the cases your case cited and their subsequent treatment
- C** Set an Alert and get automatic updates when the *Shepard's* status changes. Even select change type, e.g., negative analysis.
- D** Get the big picture on citing references. Click Grid and see citing references in context over jurisdictions and time.
- E** Get an overview of subsequent history fast ... in one sentence.
- F** Save, deliver and/or share. Familiar icons let you save reports to a Folder or deliver report specifics. For example, you can deliver the *Shepard's* report, the full text of citing references or both.

- G** Sort report results by date as well.
- H** Filter citing references to get to vital cases faster. Refine by specific treatment, specific headnotes, jurisdictions, time frame or depth of discussion. Even search for specific words within your results.
 

Click a filter; it displays in blue under Narrow By (not shown). Remove the filter; just click the X in the blue box. Select and remove multiple filters.
- I** See how citing cases have been treated subsequently by viewing their *Shepard's* Signal indicators.
- J** Determine how in-depth the citing case discusses the case you *Shepardized*™. The Depth of Discussion bars show you quickly.
- K** Find on-point headnote language. Click a headnote of interest and move to similar language in the citing case.
- L** Pinpoint citing cases' language. Get flag colors, a short description, a pinpoint page reference—and the case language in question.
- M** Review what each signal indicator means in the *Shepard's* Legend at the bottom of the screen.



## Shepard's® Graphical: map the appellate history

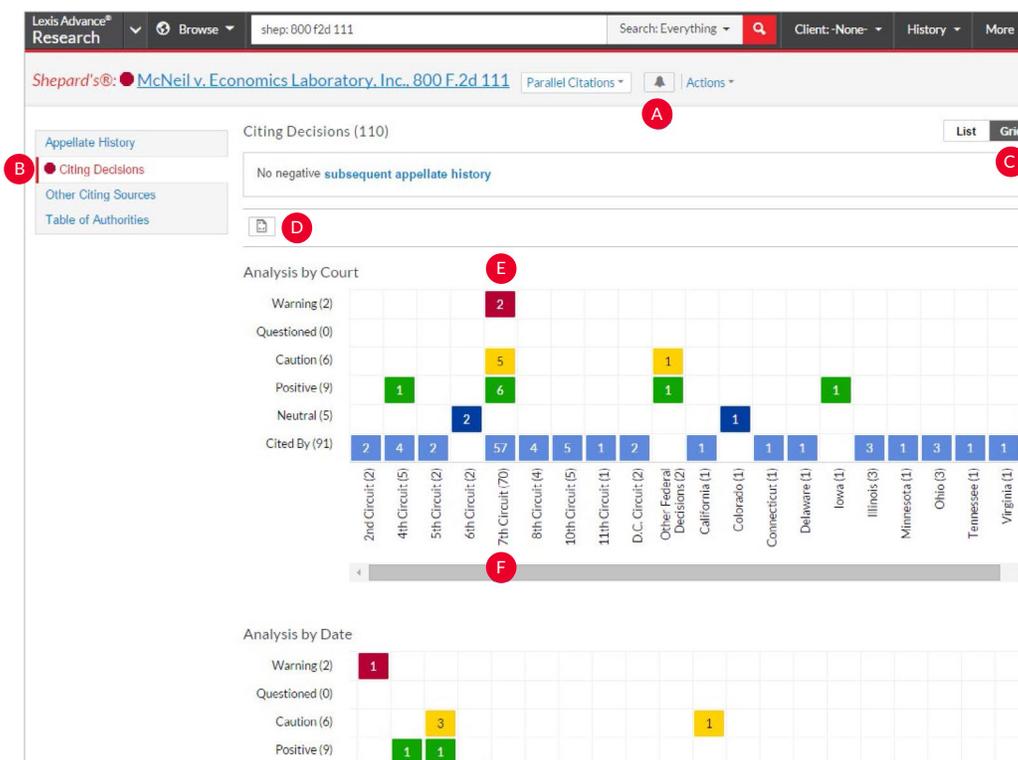
The screenshot shows the Lexis Advance Research interface for the case *McNeil v. Economics Laboratory, Inc.*, 800 F.2d 111. The top navigation bar includes the search bar with the case number, search scope (Everything), client (None), and history. Below the search bar, the case title is displayed with a 'Map' button. The main content area is titled 'Appellate History (5)' and shows a list of references. A graphical map view is displayed, showing the case's path through the courts: U.S. SUPREME COURT, FEDERAL INTERMEDIATE COURT OF APPEALS, and FEDERAL TRIAL COURT. A pop-up window for the case is open, showing the case details and actions. The map includes a legend and display options. A star icon indicates a Shepardized case.

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

- A** **View appellate history in List view.** Click the **Appellate History** subtab. A list of references is the default view.
- B** **View the history in a graphical map.** Click **Map**. (Map view is shown.)
- C** **Print your map.** Get a printer-friendly display. Then click the **Print** icon.
- D** **Understand map icons.** Click **Legend**. For example, the star labels the citation you *Shepardized*.
- E** **Remove map notations, e.g., indirect history and redisplay the map.**
- F** **Use these three icons** to zoom into the citation you *Shepardized*, move to a full-screen view or expand/contract your view, respectively.
- G** **Review vital cases in the appellate history.** Click a map icon. Then move to the full-text document or the reference in the List view.



## Shepard's® Graphical: spot trends in citing references

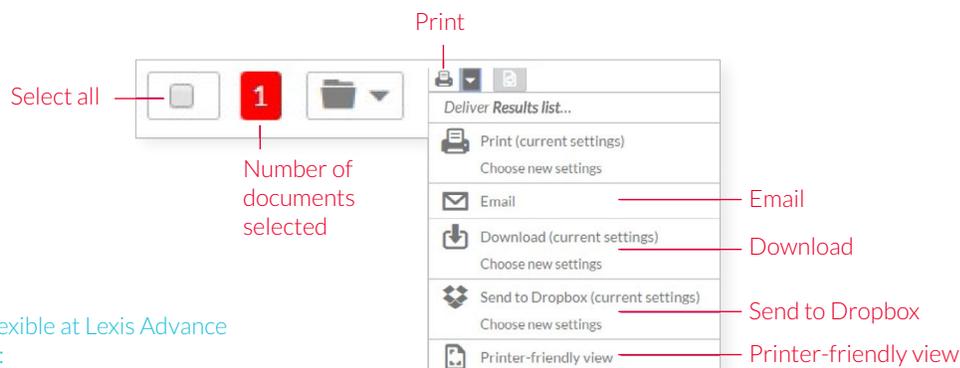


Rarely are cases overruled totally. Points of law within cases may continue to be cited across many jurisdictions. This grid shows you that quickly and effectively.

- A** **Set an Alert for changes!** Click the icon and request updates on negative analysis, any change or the changes you choose.
  - B** **View citing references in List view.** Click **Citing Decisions**. The list of citing cases is the default view.
  - C** **Get the big picture in a graphical grid!** Click **Grid**.
  - D** **Print your grid.** Get a printer-friendly display. Then click the **Print** button.
  - E** **Go to vital references in one step.** Click a grid box and move to those cases in the List view.
  - F** **Filter by analysis phrase, jurisdiction or year, e.g., click 7<sup>th</sup> Circuit (70),** to view those cases in the List view.
- Understand grid components.** Click **Legend** at the bottom of the screen (not shown). A Legend is also available at the bottom of the List view screen.

## Deliver: print, download and email

Use the same, easy-to-remember delivery icons in the same screen locations across Lexis Advance. Look for these icons at the top of your results lists, TOC pages and full-text documents: (Actual configuration may vary slightly to fit the task. For example, full-text documents won't include the "red number" or "Select all" boxes.)



Delivery is simple and flexible at Lexis Advance because you can deliver:

- **One or many documents at once.** To deliver:
  - One document: As you view the full text, select the **Delivery** icon. Choose delivery method.
  - Multiple documents: **Select the checkbox(es) next to the document(s)** in a results list, even moving among content types. **Select multiple documents from a TOC display** or a *Shepard's* report. The red box shown with the delivery icons keeps count for you. Then select the **Delivery** icon and choose delivery method. **No need to open documents to deliver.**
- **Attachments to documents.** Deliver those valuable attachments, such as PDFs.
- **Lengthy documents fast.** Delivery icons **"float"** and **stay onscreen as you scroll lengthy, full-text documents** such as cases or annotated statutes. Deliver quickly—without scrolling back to the top of the screen.
- **More than documents.** Print your results list, *Shepard's* citing references and lists of your Folder documents or Alert searches. Even deliver your Research History Map! You can also use the **Printer-Friendly View** icon and your own device print functions to print your Research History List, *Shepard's* Appellate History Map and *Shepard's* Graphical display of citing references.
- **Documents to Dropbox®.** This functionality is widely available. If you do not see the Dropbox icon (shown above) in your delivery options, check with your Lexis Advance account administrator or your LexisNexis representative.
- **Print from most modern browsers,** like Safari® or Chrome™. No plug-ins are needed.
- **Investigate further—and get there faster.** After you download or email documents, you can link back to the source at Lexis Advance from the cover page of your document.

Plus choose from many delivery options—and save a step later

After you select the **Delivery** icon, you choose delivery options. Or **save a step and bypass options by selecting your current settings.** If you select **Choose Settings**, an option menu displays offering Basic, Formatting and Content-Specific options:



### Print Options

**Basic:** Include document attachments where available. Select a printer attached to your device. (Install the print/download utility software on initial selection.)

**Formatting:** Select fonts, search terms in bold, exclude cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes. Deliver Case Summaries only.



### Download and Send-to-Dropbox Options

**Basic:** Send as PDF, .Docx. **Even select WordPerfect® .WP.** You can group and/or compress files. Select file name and destination. You can also download to CaseMap® case analysis software.

**Formatting:** Select fonts, search terms in bold, etc., plus cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes.



### Email Options

**Basic:** Send as PDF, .Docx, .WP or send to CaseMap, group and/or compress files. Add recipient addresses, subject and message.

**Formatting:** Select fonts, search terms in bold, etc., plus cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes.



## Get updates automatically: create an alert



To set up an Alert, look for the Alert “bell” icon. You’ll find it at the top of many screens when you’re conducting tasks that may require updates.

For example, it’s located conveniently at the top of your:

- Search results screen
- *Shepard’s report*
- Topic Summary report
- Compare Search Results and Find Similar Documents results in the Research History Map

This icon also displays when you:

- Display **full-text legislative and regulatory documents**
- Open the pull-down menu for some publications listed in [Browse Sources](#)
- Select a **legal topic** in [Browse Topics](#) and on the results screen when you get topic documents

### Select the Alert icon and then choose your update options

Move through the options screens in seconds, selecting just what you need.

**A Overview Options:** Select an **Alert title**, review/edit search terms, enter a description of your Alert (up to 1,000 characters) and select a client matter (optional).

**B Monitor Options:** Your options mirror your search, e.g., if you searched case law, statutes and Web content, you can include any or all of that content in one Alert update. For a *Shepard’s Alert*<sup>®</sup>, monitor for all changes, change in *Shepard’s Signal* indicator, negative changes only, changes concerning a specific headnote, etc.

**C Deliver Options:** Select start and end dates, online or email/online delivery, etc. Plus select the update frequency. Choose the delivery day and time. Or select as updates are available to get Alerts as they are released.

**D Share Options:** Add email addresses so colleagues also receive the Alert updates. (Note: Sharing may not be included with your subscription.) After choosing your options, select **Create Alert**.

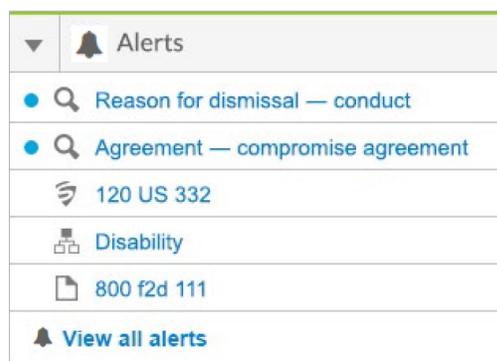


## View Alerts results

Email updates come to your inbox. View search terms to determine relevance. Select documents, review and use internal document links to navigate to other relevant documents.

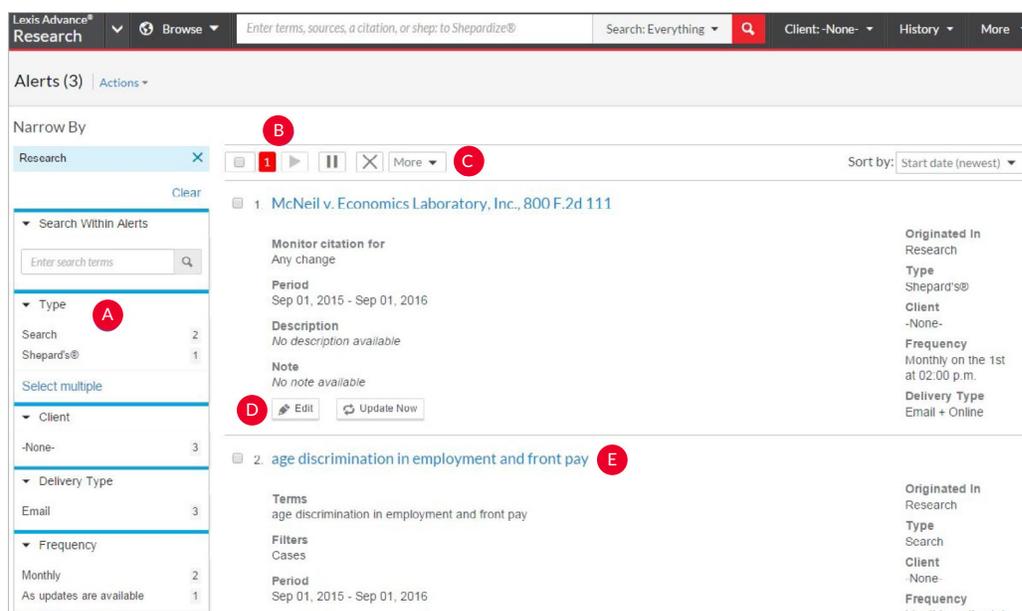
Plus you can view all your Alerts and check for updates from the Lexis Advance home page. Check the Alerts pod. The blue dot denotes update results are available for that item.

To view an alert, select its link from the Alerts pod. Or select View all alerts (or Alerts from the More pull-down menu) to move to your Alerts management screen.



## Manage Alerts: edit, delete, pause, etc.

On the Alerts management screen, you can:



**A** Filter results, even adding more search words to refine your results.

**B** Use the icons to:

- Select multiple Alerts for edits
- Start Alert updates again after pausing
- Pause the Alert updates
- Delete the Alert updates

**C** Browse and delete all results quickly. Or keep the results and mark as read.

**D** Edit search terms, change delivery frequency or content and other options.

**E** Move to your search results; select the Alert title link. The content bar (not shown) shows which content has update results. Look for the blue dots.

### Monitor legislation for updates

Select the bell icon as you view a full-text bill. Monitor options let you request updates as the bill passes each step. Or request updates for specific events, e.g., bill is vetoed.



## History: view searches and much more in the list view

**View search history for the past 90 days.** View searches, documents retrieved, *Shepard's* reports, documents delivered (You can quickly re-send them!), Web-page views, topic summaries, even searches from other LexisNexis products like LexisNexis® Litigation Profile Suite. **You can view your search history in a list view or as a graphical research map.** *Get interrupted during research?* Pick up where you left off quickly by going to your History. And go back to your Search History to save useful searches to your Folders.

- A Return to a search fast.** Select from the five most recent searches or documents from the **History pod** on the landing page. Or click **History** in the black header. Link to your complete History list by selecting **View all history**.
- B The List view** is the default view.
- C View your search history** in a graphical map. Click [Research Map](#).
- D Print your history.** Get a printer-friendly list of searches. Then click the **Print** button.
- E Sort your history** by **date** (oldest or newest first), **client** number (highest or lowest first), **type** or search **title** (alphabetical or reverse alpha order).
- F Filter history to display** by date or date range, client or tasks type, e.g., Alerts created, email sent, Web searches, legal searches, etc. Only dates with research are included. Just click a date, type, etc.; the filter **displays in blue under Narrow By**. Remove the filter; just click the **X** in the blue box (not shown).
- G See search details up-front.** Each listing tells you so much—content categories, search type, e.g., natural language, search terms, task type and more.
- H Return to your search.** Click the search title.



## History: use the map to expand your research

- A** Get a step-by-step graphical depiction of your prior research. Click **Research Map** to identify explored versus non-explored paths, possibly uncovering other relevant results.
- B** Learn more about map icons and graphical trails.
- C** Add your **History Map** to one of your Folders.
- D** Share your History Map via email or download. Request a print.
- E** Compare 2 – 3 search results to find common documents—and perhaps expand your research. Click a map search icon and **Select search to compare results**. Repeat. Then click **Compare Search Results**. Your results open in a new window.
- F** Find similar relevant documents. Click a document icon in your map and **Select document to find similar results**. Then click **Find Similar Documents**. This is a fast way to compare relevant documents to find more, including ones you may not have reviewed yet.
- G** Filter your map. Filter by **client, date**, etc. Search for **words** included in your map. You can also exclude specific searches, e.g., **trails**, on your map or change the trail order. Click **Reset map to default state** to clear filters.
- H** Rerun or save your work. Click a map icon and choose to **rerun** your search or **save a search to a Folder**.



## Document costs

Documents outside your subscription are clearly marked and **cannot be accessed unless you take active steps** to purchase them. Many out-of-subscription sources can be added to your searches without extra cost. There are no search charges or hourly charges in Lexis Advance subscriptions.

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

### Selecting out-of-subscription sources

From **Browse Sources** screens:

AAA Employment Arbitration Rules and Mediation Procedures	▼	ⓘ
AAA Labor Arbitration Awards*	▼	ⓘ
AAACN Viewpoint	▼	ⓘ
AAJIA Journal**	▼	ⓘ

Select a source with one asterisk: Search this source at no charge, but you will incur document-access charges if you select documents from the results screen. Sources with two asterisks (and a grayed-out source name) cannot be added to your search.

### Out-of-plan documents in search results

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

2. **Cambridge Univ. Press v. Becker, 863 F. Supp. 2d 1190**

Injunction granted at, Costs and fees proceeding at Cambridge Univ. Press v. Becker, 2012 U.S. Dist. LEXIS 123154 (N.D. Ga., Aug. 10, 2012)

Jurisdiction  
US Federal  
Court  
Supreme Court  
Date  
Mar 27, 1991

**Get it now!** for **\$96**

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

### Linking to out-of-plan documents

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

**Additional Charges Will Apply**

This material is not included in your flat-rate plan for this ID.

List price:	\$120	<b>Save!</b>
Your Price:	\$96	

Client ID: -None-

**Get It Now!**

### Reminders on documents you purchase

Once purchased, non-subscription documents can be used for 90 days—or for one year if the document is saved to a Folder. **Lexis Advance shows you the expiration date on the:**

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

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