



LexisNexis[®]
Total Search Expertise V4.0

User Guide



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LexisNexis Total Search Expertise

LexisNexis® Total Search Expertise is a powerful enhancement to LexisNexis® Total Search that helps users to quickly identify individuals with the right experience, skills, and relationships to serve your clients better, faster and more efficiently. Additionally, LexisNexis Total Search Expertise is a business development tool that leverages your Document Management System (DMS) and Client Relationship Management (CRM) systems to help your marketing professionals identify cross-selling opportunities and craft winning proposals for new business.

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Starting Your Search

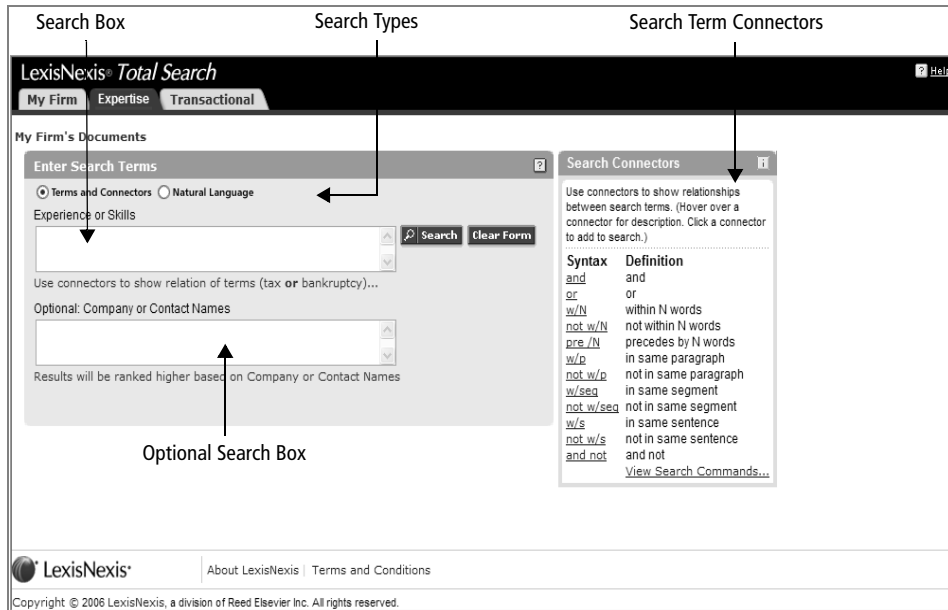
At the top of the main LexisNexis Total Search page, users with LexisNexis Total Search Expertise enabled will see the additional tab, Expertise, beside the My Firm tab. Click the **Expertise** tab to begin your search.



Note: Depending on which LexisNexis Total Search add-on you have licensed, you may not see all of the tabs shown in this user guide.

Search Form

Use the search form to enter words, phrases, or other information that you are searching for. When you define your search term(s) and click the **Search** button, LexisNexis Total Search Expertise retrieves lawyer and staff profiles that match the search criteria, and displays a list of the profiles on a new page.



Types of Searches

The search form lets you perform either of two types of searches: a search using terms and connectors or a natural language search.

Enter Search Terms

Terms and Connectors Natural Language

The first type—terms and connectors—is the default. When performing this type of search, type into the search box the terms or phrases you want to find. Use connectors to separate individual terms and phrases, as in these examples:

- **income tax AND withholding**—finds documents containing the phrase “income tax” and the word “withholding”
- **income tax w/5 withholding**—finds documents in which the phrase “income tax” appears within five words of the word “withholding”

Available connectors are listed and described in a box to the right of the search form. The best search results are found using only “AND” and “OR” connectors.

If you select the **Natural Language** option button, connectors are not available. Type a phrase in the search box, such as **insurance and mediation**. LexisNexis Total Search will determine the keywords in your entry and base the search on them.

Search Terms

The LexisNexis Total Search Expertise search form allows users to perform searches based on “Experience or Skills” and optionally based on “Company or Contact Names” information as shown in the following illustration. LexisNexis Total Search Expertise uses the firm’s documents and the information managed by LexisNexis® InterAction® (which is the firm’s client relationship management application) to search for terms.

Enter Search Terms

Terms and Connectors Natural Language

Experience or Skills

tax

Search Clear Form

Use connectors to show relation of terms (tax or bankruptcy)...

Optional: Company or Contact Names

state farm

Results will be ranked higher based on Company or Contact Names

Experience or Skills Searches

LexisNexis Total Search Expertise searches your firm's internal databases/libraries based on skills and experience criteria. In the previous illustration, **tax** was entered as the search term. When you click the **Search** button, LexisNexis Total Search Expertise displays profiles of lawyers and staff containing the search term "tax" found in the firm's LexisNexis InterAction and DMS databases.

Company or Contact Names Searches



LexisNexis Total Search Expertise also performs searches of your firms internal databases/libraries based on Company or Contact Names. In the following illustration, **tax** is the Experience or Skills search term, and **State Farm** is entered as the Company or Contacts Names search term.

When you click the **Search** button, LexisNexis Total Search Expertise returns a list of lawyers and/or staff that have experience or skills with taxes, based on the documents that they have authored and the information managed by LexisNexis InterAction. Any lawyers and/or staff with contacts at State Farm are ranked at the top of the search results.

Note: If you are using both "Experience or Skills" and "Company or Contact Names" as the search criteria, the results are based on the search term "tax," but results that also contain "Company or Contacts Names" information is ranked higher.



The Cite list for either the "Experience or Skills" and "Company or Contact Names" search types displays information as follows:

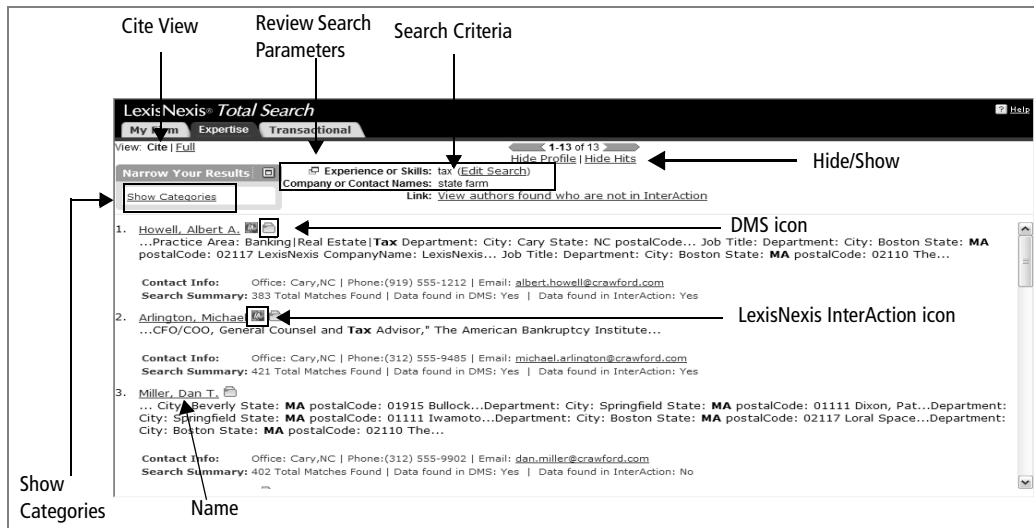
- Name and DMS and/or LexisNexis InterAction icon—identify the author [Howell, Albert A.](#), and represent data as found in the Document Management System (DMS)  or in the LexisNexis InterAction  database.
- Contact Information—the author’s office location, phone number, and an e-mail address that can be clicked to send a message.
- Search Summary—details the total number of matches found for a specific author, and also lists if the data was found in the DMS or the LexisNexis InterAction database.

Viewing Documents

LexisNexis Total Search Expertise allows users to view search results in either the Cite View or in the Full View. Each view is further explained in the following paragraphs.

Cite View

When LexisNexis Total Search Expertise results are displayed in the Cite View, a list is returned that displays the results found in the firm’s LexisNexis InterAction database, and the DMS that contains the search term “tax.” The list also provides contact information including the office location, phone number, e-mail address if available, the number of matches found, and whether the information was found in the DMS, or in the LexisNexis InterAction database.



The screenshot shows the LexisNexis Total Search interface in Cite View. Annotations include:

- Cite View**: Points to the top navigation bar.
- Review Search Parameters**: Points to the search criteria section.
- Search Criteria**: Points to the search input field.
- Hide/Show**: Points to the 'Hide Profile / Hide Hits' button.
- Show Categories**: Points to the 'Show Categories' button.
- Name**: Points to the author name 'Howell, Albert A.'.
- DMS icon**: Points to the icon representing data found in the Document Management System.
- LexisNexis InterAction icon**: Points to the icon representing data found in the LexisNexis InterAction database.


The search results list includes:

- Howell, Albert A.** (DMS icon)
 - Practice Area: Banking|Real Estate|Tax Department: City: Cary State: NC postalCode: ... Job Title: Department: City: Boston State: MA postalCode: 02117 LexisNexis CompanyName: LexisNexis... Search Summary: 383 Total Matches Found | Data found in DMS: Yes | Data found in InterAction: Yes
- Arlington, Michael** (InterAction icon)
 - ...CFO/COO, General Counsel and Tax Advisor," The American Bankruptcy Institute... Search Summary: 421 Total Matches Found | Data found in DMS: Yes | Data found in InterAction: Yes
- Miller, Dan T.**
 - City: Beverly State: MA postalCode: 01915 Bullock...Department: City: Springfield State: MA postalCode: 01111 Dixon, Pat...Department: City: Springfield State: MA postalCode: 01111 Iwamoto...Department: City: Boston State: MA postalCode: 02117 Loral Space...Department: City: Bolton State: MA postalCode: 02110 The... Search Summary: 402 Total Matches Found | Data found in DMS: Yes | Data found in InterAction: No

Hide or Show Profile / Hide or Show Hits

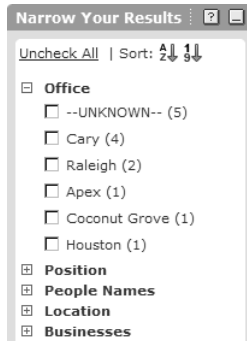
The Hide/Show icon [Hide Profile](#) | [Hide Hits](#) as shown at the top of the Cite list is used to “Hide” or “Show” search results and data. If you select **Hide Profile**, then the Contact Information and the Search Summary is not visible. If you select **Hide Hits**, then the document summary is omitted from the Cite list. If you elect to hide the Profile and the Hits, then only the author’s name and whether the data was found in the DMS, or the LexisNexis InterAction database is shown. By selecting **Show Profile** or **Show Hits**, then all Cite list information is made readily available for viewing.

Review Search Parameters


The Review Search Parameters icon  shown at the top of the Cite list shows the “Experience or Skills,” and/or the “Company or Contact Names” used to produce the search results. Near the top of the Cite list is a link that lists the names of authors that were found when searching the DMS, but not present in the LexisNexis InterAction database.

Show Categories

The **Show Categories** link may be expanded to show the various categories that can be associated with a particular search.



When you click the **Sort** button on the Narrow Your Results screen, any expanded categories can be displayed in an ascending or descending order.

Clicking on the plus sign  next to a category (i.e., Office, Position, etc.), expands that category for full display. The categories are:

- **Office**—identifies office locations of lawyers and staff in the search results. If checked, displays only data associated with the selected office location. This is useful in locating lawyers in a specific location.
- **Position**—displays the documents that have been filtered based on a selected position (i.e., Manager, Partner, etc.). Selecting the **Position** category is helpful to locate a person that performs a specific function or duty.
- **People Names**—displays only the documents that contain the selected name(s), and the search term criteria.
- **Location**—displays documents that contain a specific location name, such as a city or state.
- **Businesses**—displays documents that contain a business name.

Note: Documents are filtered based on the category/categories checked. If a particular office location is checked, and a position is also checked, then the documents will be filtered based on the office location and the position.

Full View

When you select **Full View**, or click on a name in the Cite View, the following screen is displayed. The right side of the window shows profile information including contact information, position, practice areas and education. A Martindale-Hubbell[®] link is available that contains lawyers biographical information, as well as a link to the LexisNexis InterAction database.

The left side of the window shows information associated with the name being searched, to include Related People, Related Documents, and Related Matters.

LexisNexis Total Search Expertise

The screenshot displays the LexisNexis Total Search interface for a profile of Albert A. Howell. The interface is divided into several sections:

- Related People:** Located on the left, it includes links for "View Contacts", "View Colleagues", and "View Clients".
- Related Documents:** Located below the Related People section, it lists documents such as "Plaintiff Genesis Ta...", "Plaintiffs' Motion L...", "L-Counsel-MedAfd-Dr...", "QUALIFIED SETTLEMENT...", and "Certificate of Last...".
- Related Matters:** Located at the bottom left, it lists matters such as "Matter12...", "Matter36...", "Matter02...", "Matter14...", and "Matter21...".
- Profile Area:** The main content area on the right, containing:
 - Experience or Skills:** tax (with an "Edit Search" link).
 - Company or Contact Names:** state farm.
 - Summary:** 383 Total Matches Found | Data found in DMS: Yes | Data found in InterAction: Yes.
 - Howell, Albert A.:** Personal and professional details including:
 - LSLN #: 914322915
 - Location: NC
 - Office: Cary
 - Phone: (919) 555-1212
 - Fax: (919) 555-1212
 - Email: albert.howell@crawford.com
 - Position: Partner
 - Practice Areas: Banking, Real Estate, Tax
 - Education: State University of New York, College of Agriculture & Technology at Cobleskill
 - Links:** Martindale-Hubbell | InterAction
 - Attorney Profile:** Born 1966; Admitted 1999; Duke University, B.A.; Duke University, J.D. Maintains an office in more than one location.

Related People

Related People are contacts, colleagues, and clients. When you click the **View Contacts** or the **View Colleagues** link, a LexisNexis InterAction database screen opens. Enter your login and password to proceed. This opens a LexisNexis InterAction window showing a list of contacts or colleagues that's associated with the person shown in the Full View.

A close-up of the "Related People" section from the screenshot, showing three links: "View Contacts", "View Colleagues", and "View Clients".

When you click **View Clients**, a window opens that displays a client list.

Related Documents

Related Documents displays a list of documents that has been authored by the person shown in the Full View. Click on a document title from the Related Documents list to display it. Selecting **Show All** provides additional information and a view of all documents authored by the person shown in the Full View.



Note: The **Show All** link for Related Documents is visible if more than five documents are found.

Related Matters

Related Matters is a list of matters worked on by the person shown in the Full View. When you click on a particular matter from Related Matters, a list of documents for that matter is shown.

LexisNexis[®] Total Search

My Firm Expertise Transactional

FOCUS™ Terms: Go → FOCUS™ Options Sort Documents By: Relevancy

View: Cite | KWIC | Full 1-16 of 16 Hide Profile | Hide Hits

Narrow Your Results: Terms: tax AND Matter:Matter12 AND Author ID:AAH (Edit Search)

Show Categories

- [affidavit of joe g bax](#)
...would be included in the **tax** rolls as taxable property. The...

Author: [Howell, Albert A.](#) | Document Num: 185302 | Version: 1 | Date of Last Revision: 10/18/2001 | Type: DECLARE | Client: [Client03](#) | Matter: [Matter12](#)
- [Motion to Compel John Robert Ingram to Sign Record Authorizations](#)
...employment records, insurance records, income **tax** records and social security records. Through these authorizations, Defendants intend...authorizations for the release of Ingram's medical, employment, insurance, and **tax** records are authorized by and proper under Tex. R. Civ. P. 192.3(a). The authorizations...execute all authorizations for the release of medical, employment, insurance, and **tax** records, without any redactions or...

Author: [Howell, Albert A.](#) | Document Num: 109799 | Version: 1 | Date of Last Revision: 05/08/2002 | Type: MOTION | Client: [Client03](#) | Matter: [Matter12](#)
- [Kelly-Moore Paint Co. Supplemental Exhibit List -- Reattached document, as initial conversion failed.](#)
...s Social Security and Income **Tax** Records 1-08 ...

Author: [Howell, Albert A.](#) | Document Num: 108330 | Version: 1 | Date of Last Revision: 04/11/2002 | Type: DECLARE | Client: [Client03](#) | Matter: [Matter12](#)
- [Plaintiffs Trial Exhibit List](#)
...of this lawsuit; 6. **Tax** records pertaining to Plaintiff Kimberly...

Links

Links provides the user with access to the Martindale-Hubbell or the LexisNexis InterAction databases. If the profiled person has an ISLN number listed, the Martindale-Hubbell link displays the person's public biography. If they do not have an ISLN number, a list of possible biographies with the same name is shown.

The LexisNexis InterAction link displays the public contact information of the profiled person in a LexisNexis InterAction window.