LexisNexis®

LexisNexis® Publisher

Quick Reference Guide

LexisNexis®

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Creating a New Topic

1. Click the **New Topic** sub-tab.
2. Enter a topic name.
3. Enter the name and email address of the editor who will be responsible for this topic.
4. If notification is desired, select **Email editor when new search results are available**.
5. Enter the number of topic list headlines to display for end users.
6. If desired, enter a comment about the topic list for end users.
7. Enter the number of days to keep published documents if less than the subscribed timeframe.
8. Select whether the topic will be active, private, both, or neither.
9. Select whether to display document ranking for end users.
10. Select duplicate document detection settings:
    i. In the **Detection Method** drop-down list, select your desired detection method.

    > Tip: **Headlines and Sources Match** is the recommended method of detecting duplicate documents.

    ii. In the **Handling** drop-down list, select how you want to handle duplicate documents.

    > Tip: **Overwrite duplicate(s) with new document's contents** is the recommended method of handling duplicate documents.

> Note: You cannot save a new topic until you have also created a search within that topic.

Creating a New Search

LexisNexis® Publisher topics organize and contain your searches related to a specific subject, but searches do the actual work of finding and retrieving documents. You can create up to 10 related searches within a single topic.

To create a LexisNexis search:

1. On the **New Topic** sub-tab, scroll down to the New Search form.
2. Select **LexisNexis Search** from the **Select Search Type** options.
3. Enter a name for the search.
4. Enter a project/client name.
5. In the **Menu** drop-down list, select the desired source menu.

   Note: The number of menus available depends upon your organization's subscription.

6. In the **Source** drop-down list, select the desired source.

   Note: The **Source** list will be empty if you have not yet run any searches. To add sources to the list, click **Find More Sources**.

7. Enter headline or lead terms (if desired).
8. Enter terms relevant to the search, including segments and Boolean connectors.

   Note: For more help constructing searches, see the *Search Tips*.

9. Limit your search by doing one or more of the following:

Value	Description
Exclude non-business articles	Select to search only within business-related articles.
Ticker	If you want to search for a specific company and know its ticker, enter the ticker.
Date	Select a date range for the search.
From	Enter a beginning date (in mm/dd/yyyy format) for the search.

10. Click **Search**. Your search and topic will be saved and run for the first time.

Setting Display Preferences

You can set default settings for all of your topics at one time, thus saving time and effort. With these settings, you can customize the content you access and integrate it seamlessly into your Web site. You can also set display defaults for email notifications sent to your end users.

This quick reference guide introduces you to setting display defaults. For more detailed information and step-by-step instructions, see the *LexisNexis® Publisher User Guide*.

Formatting Text

Within both the online and email display defaults pages, you can format the different categories of text (based on usage) that appear within the topic list, document lists, and full-text documents. You can also change the font, color, and style (bold, italic, underline) for the different categories of text to match the design of your organization's Web site.

On both the Online Display Defaults page and the Email Display Defaults page, the form for formatting text is located on a sub-tab called Fonts/Colors Preferences under any main tab (except the Header & Footer tab). The form lists different categories of text and allows you to change how each category is displayed.

Tip: You can preview your formatting changes at any time by clicking **Refresh** or **View in New Window** above the preview box.

To change this…	Do this…
Text Color	Click the colored square to the right of the appropriate heading and choose a new color from the color palette. **Tip:** You can also enter either the RGB or HEX value for a specific color.
Font	Choose a font from the **Font** drop-down list.
Font size	Choose a pixel size from the **Size** drop-down list.
Text style	Choose a style (italic, bold, or underline) from the **Style** list. To choose more than one style, CTRL-click each style you want to apply. To clear a style, CTRL-click the style you want to remove.

Setting Online Display Defaults

Online display defaults affect the way content displays on your Web site. You can set display defaults for your organization's topic list, document list, and full-text documents.

To access the Online Display Defaults page, click **Online** under Set Display Defaults in the Additional Tasks area on the Topics Home page.

Note: You can set different online display preferences for a specific topic on the New Topic page when you create a new topic or on the Edit Topic or Search page.

Setting Email Display Defaults

Email display defaults affect the way content appears in emails to your end users. You can set display defaults for your email header and footers, document list, and full-text documents.

Note: Select **Format Email Display** on the Org Preferences page in order to set email display defaults. To learn more, see “Setting Organization Preferences” in the *LexisNexis® Publisher User Guide*.

To access the Email Display Defaults page, click **Email** under Set Display Defaults in the Additional Tasks area on the Topics Home page.

Managing Results

After you create a new topic and its associated searches, you will want to be able to manage the results that the topic produces.

To manage topic results:

1. On the Topics Home page, click the **Actions…** menu link for the topic you want to manage.
2. Click **Manage Results**. The Results page appears.
3. Use the Staged, Published, and Deleted tabs to work with your results. For more information about working with results, see “Working with Search Results” in the *LexisNexis® Publisher User Guide*.

Scheduling an Alert

When you create a search, it is set by default to run only when you initiate it (a manual search). You can schedule an alert to run a search automatically so you don't have to manually initiate the search every time you want to check for new results.

To schedule an alert:

1. On the Topics Home page, locate the topic that contains the search for which you want to schedule an alert.
2. Click the **Actions…** link to the right of the topic.
3. Click **Edit Topic or Search**.
4. Scroll down to the Current Searches area at the bottom of the page.
5. In the Schedule Alerts area, click the **Edit Alert** link for the desired search. You will be redirected to the Scheduled Alert form.
6. In the drop-down list, select how you want the alert to run.
7. Use the option buttons to select how frequently you want the alert to run.
8. Click **Save**. Your alert will be scheduled and run for the first time.

Tip: You can also edit or schedule alerts from the **More Actions** drop-down list on the Results page.

Note: You cannot schedule an alert for a search that has never been run or that has not been run in two days. If you wish to schedule an alert for such a search, first run the search, then schedule the alert.

Publishing to a Web Site

To publish a single topic to your organization's Web site:

1. On the Topics Home page, click the **Actions…** menu link for the topic you want to publish.
2. Click **Show Topic URL**.
3. Copy the URL that you need (HTML, XML, or RSS feed) and paste it into your intranet page as a link.

To publish all topics to your organization's Web site:

1. In the Additional Tasks area on the Topics Home page, click **Show All Topics URL**.
2. Copy the URL that you need (HTML, Frame Display, or XML) and paste it into your intranet page as a link.

Generating Reports

LexisNexis® Publisher provides powerful reports to help you track your organization's LexisNexis Publisher activity. You can generate usage reports, subscription reports, and topic reports according to your organization's needs.

Note: The types of reports available to you depends on the terms of your organization's subscription.

You can choose to print or download (as a .csv file) any of the reports that you generate. To print or download a report, click the appropriate icon at the top of the report.

To generate an administrative report:

1. Click the **Administration** tab.
2. Click the **Reports** sub-tab.
3. Select the type (usage, subscriptions, or topic) of report that you want to generate.
4. Select the specific report that you want to generate.
5. Click **Generate Report**.

Tip: For more detailed information and step-by-step instructions for generating each type of report, see "Generating Reports" in the *LexisNexis® Publisher User Guide*.

Additional Resources and Information

Additional Resources

For a copy of the current *LexisNexis® Publisher User Guide* or *LexisNexis® Publisher Search Tips*, as well as other resources such as FAQs, Best Practice Tips, and a list of recent Publisher enhancements, please go to www.lexisnexis.com/infopro/publisher.

Research Assistance

- For technical assistance, call Customer Support at 877-810-5325.
- For training or for help in formulating a search, contact your LexisNexis Librarian Relations Consultant.