

Lexis Advance®

Research Quick Guide

for Law School

This guide shows you where to find—and how to use—Lexis Advance® features and content. Keep this easy-to-use interactive guide handy for quick reference to features you use often.

On the move? Lexis Advance screens adapt automatically to your mobile device.

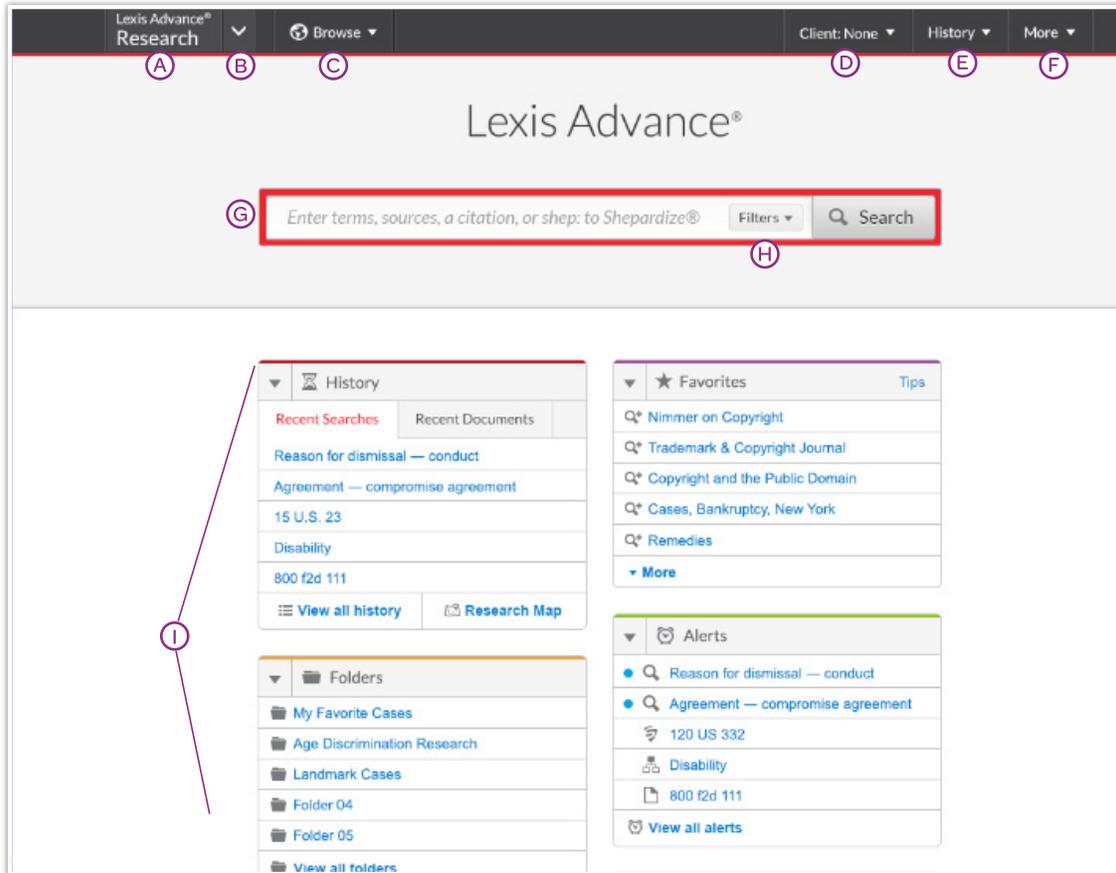
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lexisnexis.com/lawschool is your resource for on-demand research training, updates on new Lexis Advance enhancements and contact information for your school's Account Executive.

Find how-to videos on legal research:

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START YOUR SEARCH: RED SEARCH BOX (HOME)



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

- (A) **Return to this home page.** Click the **Lexis Advance logo** on any screen.
- (B) **Access other products.** Click the down arrow for access to *lexis.com*®, Lexis Practice Advisor®, LexisNexis® Litigation Profile Suite and more.
- (C) **Browse sources or legal topics.** Click **Browse**. Select **Sources** or **Legal Topics**. Drill through the hierarchy or search for specific sources or topics.
- (D) **Change/edit client.** Use to organize research by class name.
- (E) **Return to recent searches** or documents retrieved. Also use the History pod below the red search box.
- (F) **Link to Settings, Help, My Lexis™, Sign Out, etc.** Also gain access to Folders, Alerts and Notifications. Or use the home page pods shown on this page.
- (G) **Enter your search words, find sources and more.** Enter a:
 - **natural language search** and click **Search**. No source selection necessary
 - **terms and connector search**, e.g., *americans disabilities /20 alcohol!* and click **Search**.
 - **citation**, e.g., *800 f2d 111* and click **Search** to retrieve the full-text document as well as search results for that citation
 - **partial or full source title**, e.g., *Collier*, to find a source title to add to your search. Or retrieve the source's documents
 - **popular case name**, e.g., *roe v. wade*, and click **Search** to retrieve the full-text document as well as search results for that case
 - **popular statute name**, e.g., *Georgia Lemon Law*, and click **Search** to retrieve the full-text document as well as search results for that statute
 - **Shepard's® request**, e.g., *shep: 800 f2d 111*, and click **Search**
- (H) **Refine your search upfront and filter** by content, jurisdiction or practice area—or get help with terms & connectors. Click **Filters** to re-use recent sources, filters or topics. You can also filter your **search results**.
- (I) **Get there quicker!** Come to this page for fast access to favorite sources, Folders, Alerts and legal topic update notifications (A blue dot means that item has new information). Also get access to **Help topics**.

FILTER: REFINE YOUR SEARCH AND SAVE TIME

Filter **search results** to limit the number of documents after a search. Or **save time up front by filtering before you search**, choosing jurisdictions, content categories and/or topics. Add **favorite sources, source combinations, recently used filter combinations or frequently used legal topics** to your search. Finally you can get assistance developing a **terms & connectors** search.

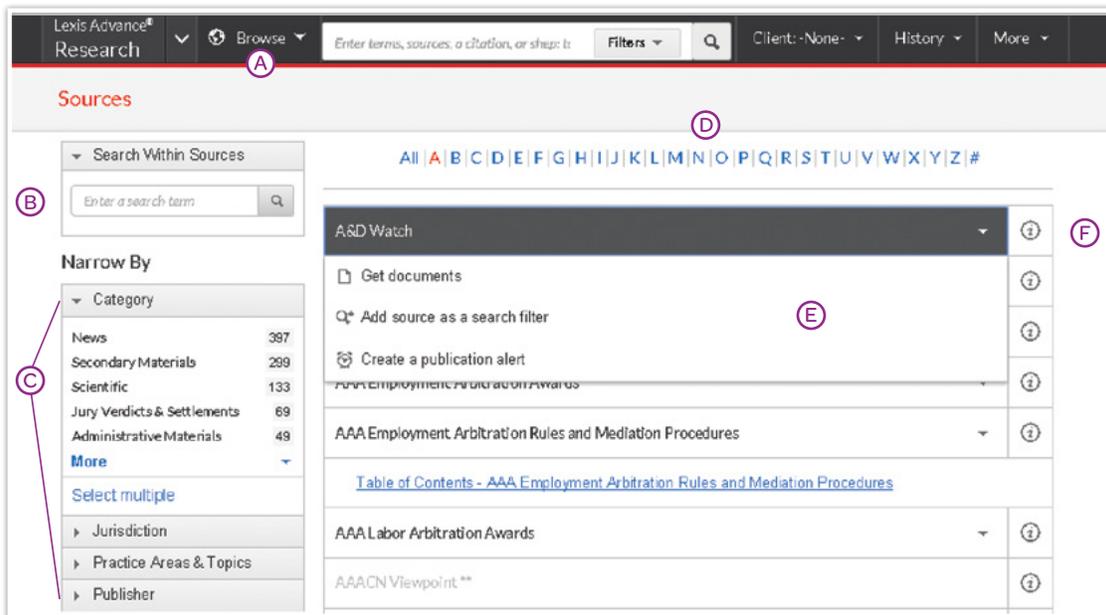
- A** Click the **Filters** pull-down menu to add filters. As you add, the filters box displays the number of filters you've selected.
- B** As you add filters across screens, the **Narrow by** box displays your filter choices. Click the **X** to delete a choice or **Clear** to remove all choices.
- C** Add your filter combination to your **Favorites list**. Click the star to **save the combination** and re-use.
- D** **Navigate filters here**. Select a filter to display its options.
- E** **Category** options include all content types available, e.g., select to search only legislative sources and cases. Also choose what category to display first.
- F** **Practice Area & Topic** options include more than 40 practice areas.
- G** **Recent & Favorites** options include up to 50 recent and favorite sources/source combinations, recent and favorite filter combinations, and recent and favorite legal topics selected from **Browse Topics**.
- H** **Advanced Search** helps you select terms & connectors search commands. Also link to **citation formats** for retrieving full-text documents.
- I** Click **Search** to close the Filter box when you've finished selecting filters.

BROWSE SOURCES: FIND SPECIFIC SOURCES TO SEARCH

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



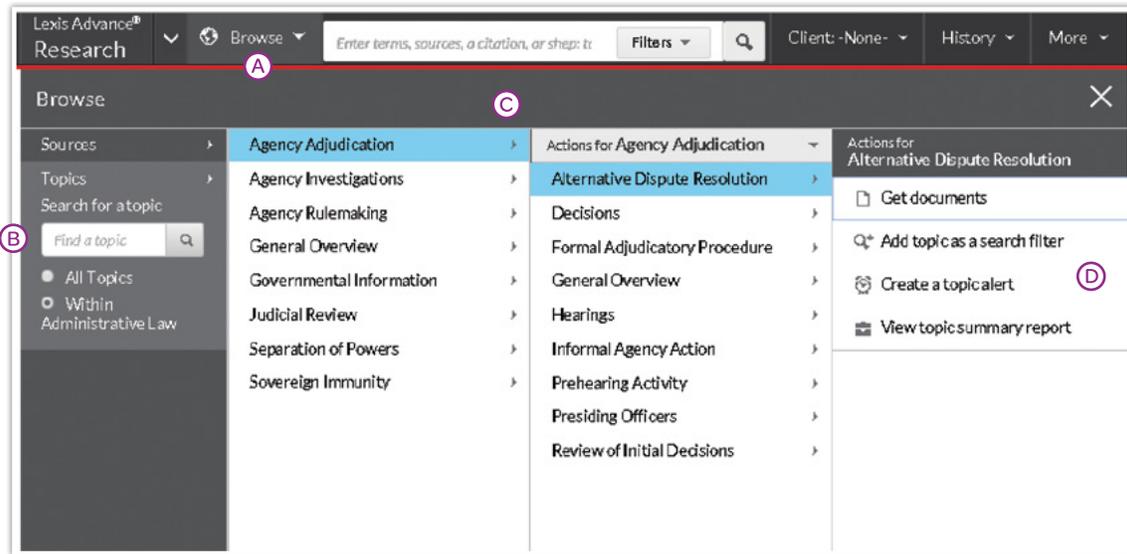
1. If you know the source name or partial name, enter it in the red search box.
 - Select a source title to add it to your search.
 - Select a source's **Table of Contents (TOC)** link to browse the TOC, search the full TOC or **select specific parts of the TOC** to search and/or deliver.
 - Select a source's **Get Documents** link to retrieve all available documents for that source. Then you can set a **Publication Alert** to get source updates.



2. It's easy to browse or search source listings from the top menu:

- 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:
 - retrieve all available documents for that source
 - add the source to your search
 - set up an Alert to get new releases from that source
- F** Click the information **i** icon to display the source description with details on content, coverage and update schedule.

BROWSE TOPICS: FIND AND SEARCH BY LEGAL TOPIC



If you want to learn more about a legal topic, begin your research in Browse Topics. You'll discover a variety of resources on the topic—news, legislation, cases, dockets and more. **Selecting a relevant headnote** in a case will also bring you to this topic hierarchy.

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

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

SEARCH RESULTS: FIND MOST RELEVANT DOCUMENTS FAST

The screenshot shows the Lexis Advance Research interface for a search on "age discrimination". The search bar at the top contains "age discrimination" and includes filters, a search icon, and options for Client, History, and More. Below the search bar, the results are categorized by "Cases". On the left, there is a "Snapshot" section with a "Cases" link (C) and a "Narrow By" section (G) where "U.S. Federal" is selected. A "Search Within Results" box (G) is also present. The main results area shows two cases: "Kimel v. Fla. Bd. of Regents, 528 U.S. 62" (D) and "Hazen Paper Co. v. Biggins, 507 U.S. 604" (E). Each case entry includes a "Save in a Folder" icon (D), a "Print, download or email" icon (E), and a "Determine relevance" icon (H). A "Sort by" dropdown (F) is set to "Relevance". A "Keep track of documents viewed" icon (I) is shown next to the first case. A "Return to prior research tasks" icon (J) is located in the top right corner.

Get to your most relevant results faster with many options for refining and using your search results on this screen:

- (A) **Set up an Alert** for your search—across content types, if you choose. Click the **alarm clock** icon next to your search.
- (B) **Actions** add a search to a **Folder** or **expand** your search.
- (C) **See the top relevant results** for each content category. Click **Snapshot**.
- (D) **Save in a Folder**. Check the box next to the document title then click **Add to Folder**. Select a **Folder**. When that document appears in future results, it displays the **Saved to Folder**  icon. Click the icon for quick Folder access.
- (E) **Print, download or email** without opening documents. Check the box next to document titles you need, then click the appropriate icon. Also create a print-friendly page of your results.
- (F) **Sort documents**. Default is by relevance. Use this pull-down box to **re-sort** by date and/or jurisdiction, etc.
- (G) **Refine your search**. 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.
 - **Adding more words** to your search. Enter them in the **Search within results** box.
 - **Date**, slide the Timeline or enter dates.
 - **Narrow By options**, e.g., publication status, source, practice area & topics, attorney, law firm, judge, most cited and keyword. Each category offers different options, so you can only filter by one category at a time.
- To add filters:** Click a filter link; **it displays in blue under Narrow by**. **To remove the filter:** click the **X** in the blue box. Select and remove multiple filters for different results.
- Save favorite filter combinations**, e.g., a category and jurisdiction, to use again. Click the **star** and save the combination to your Favorites pod on the home page.
- (H) **Determine relevance**. See your search terms in context to help determine which documents are on point.
- (I) **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.
- (J) **Return to prior research tasks**. Click **History** and select a prior search or document.

SNAPSHOT VIEW: THE MOST RELEVANT RESULTS ON ONE SCREEN

The screenshot shows the Lexis Advance Research interface. At the top, the search term is 'age discrimination in employment'. Below the search bar, the 'Results for: age discrimination in employment' section is displayed. On the left, a navigation menu is open, showing various content categories. The 'Snapshot' view is active, displaying a list of results under the 'Cases' category. The first three results are highlighted with callouts A, B, and C. Callout A points to the navigation menu, B points to the action icons (Add to, Print, Email, Download), and C points to a document link. At the bottom right, there is a 'View More Categories' button labeled D.

Lexis Advance[®] Research

age discrimination in employment

Results for: age discrimination in employment

Snapshot

Cases

1. **McDonnell Douglas Corp. v. Green, 411 U.S. 792**

Overview: Where a former employee proved a prima facie case of racial discrimination by his employer, who showed a legitimate, nondiscriminatory reason for not rehiring him, the employee could show that the reason was used as a pretext for discrimination.

Jurisdiction U.S. Federal Court Supreme Court Date May 14, 1973

2. **Hazen Paper Co. v. Biggins, 507 U.S. 604**

Overview: Former employers did not violate the Age Discrimination in Employment Act of 1967 just by interfering with an older employee's pension benefits that would have vested by virtue of the employee's years of service.

Jurisdiction U.S. Federal Court Supreme Court Date Apr 20, 1993

3. **Gen. Dynamics Land Sys. v. Cline, 540 U.S. 581**

Overview: In a reverse age discrimination suit brought by employees and retirees against an employer, the Court determined that the ADEA did not prohibit favoring the old over the young.

Jurisdiction U.S. Federal Court Supreme Court Date Feb 24, 2004

View all Cases

Statutes & Legislation

1. **2013 H.R. 2852**

View More Categories

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 or save multiple documents to Folders.

- A** In the **Snapshot View**, the top three results in the **first four** content categories in your search results 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. Click the **print**, **email** or **download** icons or the **Folder** icon. **And save even more time with** quick delivery options that let you **bypass dialog boxes**. Download delivery plug-in for **Apple® Safari®**.
- C** Click a **document link** to open the full-text document.
- D** Click **View More Categories** at the bottom of the Snapshot screen to expand the Snapshot view.

FOLDERS: SAVE DOCUMENTS, SELECTED TEXT, SEARCHES, ETC.

Organize your research to save time. View your folders using the **Folder** pod on the landing page or click the **More** pull-down menu at the top of most Lexis Advance screens. Here you can modify, organize & deliver folder contents.

Save more than full-text documents. Copy and save selected document text, search result lists, effective searches and Research Maps from History, Web links, Topic Summary Reports, PDFs, etc., as well as documents from other LexisNexis® products like LexisPractice Advisor. **Documents stay in Folders** until you remove them. If allowed at your school, the Folder sharing option lets you **share Folder items or entire Folders** and manage access.

- (A) **Add Folder notes.** Click and add up to 4,000 characters.
- (B) **Move, copy, share or delete Folders with Actions.** Also download the Folder, rename it or update all *Shepard's Signal*™ indicators.
- (C) **Search within All Folders.** Search for vital facts across all Folders and notes. Just enter your search words, e.g., front pay.
- (D) **Use Folder listings/documents.** Check the **box(es)** next to the listing(s). Select a **delivery icon**, e.g., print. Select the **More** pull-down menu to **remove** the document from the folder, **share** or **manage sharing** options (if allowed in your school).
- (E) **Sort by.** Re-sort Folder documents by date modified, newest documents, relevance and more.
- (F) **Create Folders.** Create a subfolder within a Folder, or create a **new Folder**, by first clicking **My Folders** then the **Create Folder** button.
- (G) **Move among your Folders.** Just select a Folder link. Click ▼ to open levels of subfolders. Also see how many documents you've shared.
- (H) **Click a document listing link** to view the search, filters and sources used to get the document. Open the document or view the text selection. **Add Notes** to the listing. Also **View all notes** for the Folder.
- (I) **Shepard's Signal indicators.** Ensure documents are good law. See immediately when a document was checked via *Shepard's*. Update if needed.
- (J) **Manage shared Folders and items**, and view items shared with you by others.
- (K) **Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them.

CASES: MUCH 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 main content area shows the case title, citation, and reporter information. A sidebar on the right provides additional resources such as Shepard's reports, Citing Decisions, and Topic Summaries. A context menu is open over a highlighted passage in the main text, offering options like Copy, Add to folder, Add to search, Annotate, and Highlight.

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

- A** Save the document to a Folder, print, deliver or share. Also request a printer-friendly version.
- B** Jump to specific document parts, e.g., opinion or headnotes. Move among search terms or reporter pages.
- C** Move among results documents. Click Results List to view your full results set.
- D** Copy the full-case citation for your work. Include parallel citations and a link to the full-text case. Format your citation quickly with a variety of style formats.
- E** Check the *Shepard's* status immediately. See possible issues and move directly to the *Shepard's report*.
- F** Select a reporter citation to view its pagination.
- G** Select—and use—vital text. When you select text, an options box displays. Copy the text to paste it in your work; save the text to a Folder with optional annotation; search using the selected text; or highlight it. Save the highlighted document to a Folder to retain your highlight.
- H** Link to full-text documents cited. Just click the link.
- I** Get more detail on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to search across Lexis Advance for more information, such as the entity's other cases.
- J** Open the original source PDF and other available case documents.
- K** Come up to speed on the legal topics. Find seminal cases and statutes, relevant secondary sources and details on burden of proof, review standards, etc., for the legal topics covered. Also find Topic Summary Briefcase icons LexisNexis® headnotes. Click and link to Topic Summary Reports.
- L** Highlight a passage that represents your issue. Click Activate Passages. Legal Issue Trail opens in a new window with cases that cite to your case as well as the cases cited in your case—for your specific legal issue.

SHEPARD'S® CITATIONS SERVICE

The screenshot shows the Lexis Advance Shepard's Citations Service interface. At the top, the search bar contains 'shep:800f2d 111'. The main header displays 'Shepard's®: McNeil v. Economics Laboratory, Inc., 800 F.2d 111'. The left sidebar has a 'Narrow By' section with a table of filters:

Filter	Count
Warning	2
Overruled in part by	1
Overruled as stated in	1
Cautions	6
Distinguished by	6
Positive	9
Followed by	9
Neutral	5
Cited in Dissenting Opinion at	3
Cited in Concurring Opinion at	1
Explained by	1
"Cited by"	91

The main area shows 'Citing Decisions (110)' with a 'List' and 'Grid' view selector. Below this is a 'Narrow By' section with a 'Depth of Discussion' bar and a 'Court' dropdown. The main list of citing decisions includes:

- Buscemi v. Pepsico, Inc.** (Green diamond signal) - 736 F. Supp. 1267, 1990 U.S. Dist. LEXIS4233, 53 Empl. Prac. Dec. (CCH) P39906, 62 Fair Empl. Prac. Cas. (BNA) 425. Cited by: 736 F. Supp. 1267 p.1270. Depth of Discussion bar is high. Court: S.D.N.Y. Date: 1990.
- Nobler v. Beth Israel Medical Center** (Yellow triangle signal) - 715 F. Supp. 570, 1989 U.S. Dist. LEXIS6667, 50 Empl. Prac. Dec. (CCH) P39160, 55 Fair Empl. Prac. Cas. (BNA) 1531. Cited by: 715 F. Supp. 570 p.573. Depth of Discussion bar is low. LexisNexis® Headnotes: HN16.

The bottom of the screen features a 'Shepard's Legend' section with callout letters L and M.

A See treatment 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 Alerts provide updates when the *Shepard's* status changes. You can 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 Pinpoint citing cases' language. Get flag colors, a short description, a pinpoint page reference—and the case language in question.

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

K Depth of Discussion bars quickly show how in-depth the discussion in this case is of the case you *Shepardized*.™

L Find on-point headnote language. Click a headnote of interest and move to similar language in the citing case.

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 displays the Lexis Advance Research interface for the case *McNeil v. Economics Laboratory, Inc.*, 800 F.2d 111. The main area is titled "Appellate History (5)" and shows a graphical map of the case's history. The map is divided into three horizontal sections representing different court levels: U.S. SUPREME COURT, FEDERAL INTERMEDIATE COURT OF APPEALS, and TRIAL COURT. The x-axis represents time, with years 1985, 1986, 1987, and 1988 marked. A blue square icon representing the case is positioned at the 1986 mark in the FEDERAL INTERMEDIATE COURT OF APPEALS section. A tooltip for this icon displays the case name, citation, and actions: "Open Document" and "Show in list". A legend in the bottom-left corner explains the map's symbols, such as "Shepardize™ citation" (blue square), "Direct connection" (solid line), and "Indirect treatment history" (dashed line). A "List" button is visible in the top right corner of the map area.

For a quick understanding of the history of a case, the appellate history map gives you a visual snapshot of how it traveled over time through different courts.

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

SHEPARD'S® GRAPHICAL: SEE TRENDS IN CITING DECISIONS GRID

The screenshot shows the Lexis Advance Research interface for the case *Hybert v. Hearst Corp.*, 900 F.2d 1050. The interface is in List view, showing 118 citing decisions. A navigation menu on the left includes 'Appellate History', 'Citing Decisions' (selected), 'Other Citing Sources', and 'Table of Authorities'. A search bar at the top contains the case name and a 'Parallel Citations' dropdown. A 'Print' button is visible below the 'Citing Decisions' section. The main content area features two charts: 'Analysis by Court' and 'Analysis by Date'. The 'Analysis by Court' chart shows the number of citing decisions for each court, categorized by analysis type (Warning, Questioned, Caution, Positive, Neutral, Cited By). The 'Analysis by Date' chart shows the number of citing decisions for each year, also categorized by analysis type. A 'Legend' button is located at the bottom right of the interface.

Analysis Type	1st Circuit (2)	2nd Circuit (3)	3rd Circuit (3)	5th Circuit (7)	6th Circuit (1)	7th Circuit (75)	8th Circuit (10)	10th Circuit (2)	11th Circuit (5)	D.C. Circuit (2)	Other Federal Decisions (1)	California (1)	Illinois (1)	Minnesota (2)
Warning (0)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Questioned (0)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Caution (10)	1	0	0	0	0	4	1	2	0	0	1	1	0	0
Positive (5)	0	0	0	0	0	3	0	0	1	1	0	0	0	0
Neutral (1)	0	0	0	0	1	0	0	0	0	0	0	0	0	0
Cited By (102)	1	3	3	7	1	67	10	1	3	1	0	0	0	2

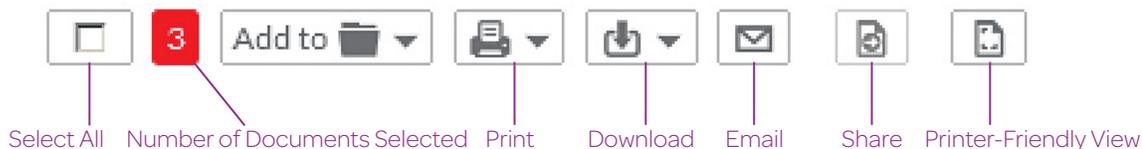
Analysis Type	1999 (1)	2000 (7)	2001 (2)	2002 (3)	2003 (4)	2004 (3)	2005 (0)	2006 (1)	2007 (6)	2008 (1)	2009 (2)	2010 (5)	2011 (2)	2012 (2)	2013 (4)
Warning (0)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Questioned (0)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Caution (10)	0	2	1	1	0	0	0	0	0	1	0	0	0	0	0
Positive (5)	0	0	0	0	0	0	0	1	0	0	1	1	0	0	0
Neutral (1)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cited By (102)	1	5	1	2	4	3	0	1	5	0	2	4	1	2	4

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

- (A) View citing references in List view.** Click **Citing Decisions**. The list of citing cases is the default view.
- (B) Set an Alert for changes.** Click the icon and request updates on negative analysis, any change, or the changes you choose.
- (C) Get the big picture in a graphical grid,** as shown. Click **Grid**. To return to a List view, click **List**.
- (D) Print your grid.** Get a printer-friendly display. Then click the **Print** button.
- (E) Go to vital references in one step.** Click a grid box and move to those cases in the List view.
- (F) Filter by analysis phrase,** jurisdiction or year, e.g., click **7th Circuit (75)**, to view those cases in the List view.
- (G) Understand grid components.** Click **Legend** at the bottom of the screen. (Not shown.) Also available at the bottom of the List view.

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 (Tables of Contents) 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 a delivery icon. Choose delivery options. (See option details below.)
 - Multiple documents: **Select the check box(es)** next to 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 with the delivery icons keeps count for you. Then select a delivery icon and choose delivery options. **No need to open documents to deliver.**
- **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, shown above, 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.
- **From your Safari browser.** Load the Lexis Advance print/download utility when prompted.

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

After you select a delivery icon, you choose delivery options. Or **save a step and bypass options by selecting your default options.** If you select **Choose Settings**, an option menu displays offering basic, formatting and content-specific options:

 **Print Options**
Basic: Select a printer attached to your device. (Install the print/download utility software on initial selection.) You can also include your formatting choices on your cover page.
Formatting: Select fonts, search terms in bold, exclude cover page and other options. Even view highlights and notations you add to the document.
Content-Specific: For example, include headnotes with cases or annotations with statutes.

 **Download Options**
Basic: Send as PDF, .Docx or send to CaseMap® case analysis software. **Even select WordPerfect® .WP.** You can Group and/or compress files. Select file name and destination.
Formatting: Select fonts, search terms in bold, etc., plus cover page and other options. Even include highlights and notations you add to the document.
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. Even include highlights and annotations you add to the document.
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 “alarm clock” 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
- Get Document/source results screen, i.e., when you select the [Get Documents](#) link.
- 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 Alert title and search terms.

(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 *Shepard’s* Alerts, 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**.

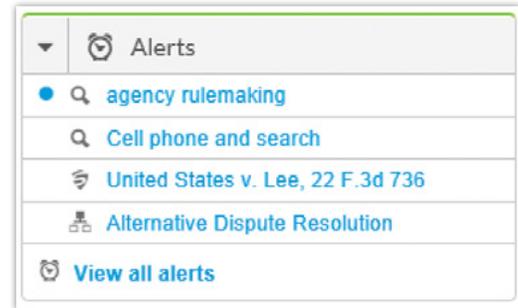
GET UPDATES AUTOMATICALLY: CREATE AN ALERT

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.

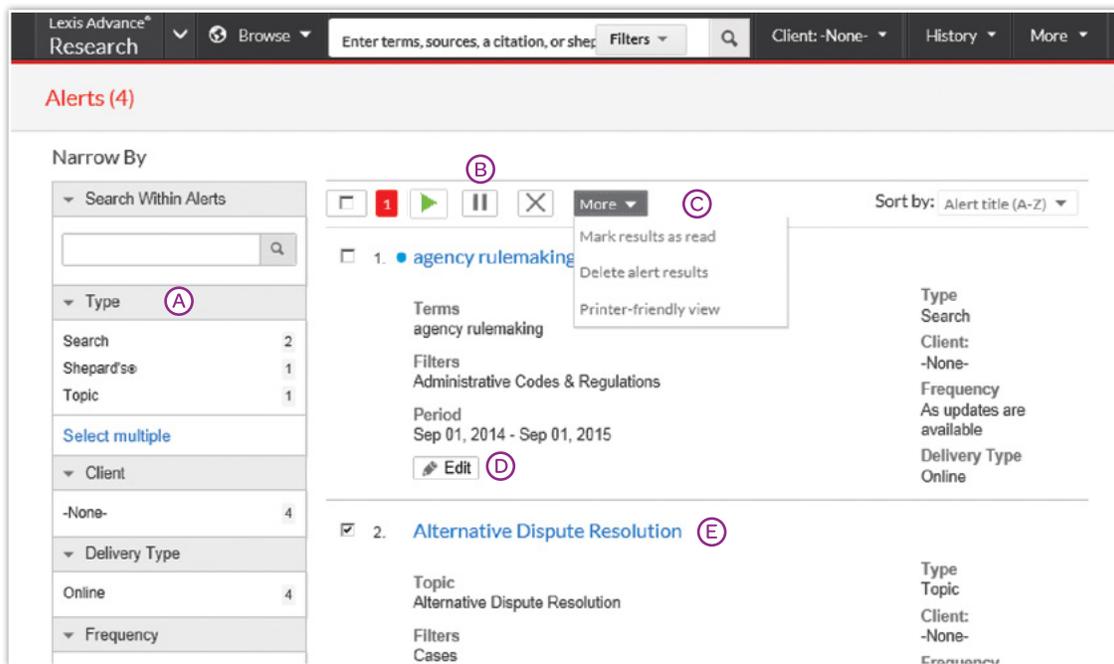
Plus you can view all your Alerts and check for updates from the Lexis Advance home page. Check the Alerts pod. The blue dot denotes update results are available for that item.

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  
 - As you select, the red box counts for you
 - 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 a publication for updates

Create a Publication Alert for the sources you rely on. When you select the **Get Documents** link, look for the alarm clock icon at the top of the source results screen.

Monitor legislation for updates

Select the alarm clock 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

The screenshot shows the Lexis Advance Research History page. At the top, there's a search bar with "knock and announce" and a "History" dropdown menu. Below the search bar, the "History" section is active. On the left, there's a "Narrow By" sidebar with filters for Date, Type, and Client. The main area shows a list of 19 search results. The first three results are visible: "knock and announce", "dog bite", and "McNeil v. Wisconsin, 501 U.S. 171". Each result shows search details like "Narrowed By", "Content Type", "Jurisdiction", "Practice Areas and Topics", "Search Type", and "Legal Phrase Equivalents". The "knock and announce" result also shows "Type: Legal Search", "Client: -None-", and "Date & time: Aug 18, 2014 02:45:24 p.m. EDT". The "dog bite" result shows "Type: Legal Search", "Client: -None-", and "Date & time: Aug 18, 2014 02:44:42 p.m. EDT". The "McNeil v. Wisconsin, 501 U.S. 171" result shows "Terms: Shep 501 U.S. 171", "Category: Annotate History", and "Type: Shepard's® Search".

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.** You can sort your history by **date** (oldest or newest first), **type** or **search title** (alphabetical or reverse alpha order).
- F** **Filter history to display** by date or date range or tasks type, e.g., Alerts created, email sent, Web searches, legal searches, etc. Only dates with research are included. Just click a date, type, etc.; the filter **displays in blue under Narrow by**. Remove the filter: just click the **X** in the blue box.
- G** **See search details up front.** Each listing tells you so much—content categories, search type, e.g., natural language, search terms, task type and more.
- H** **Return to your search.** Click the search title.

HISTORY: USE THE MAP TO EXPAND YOUR RESEARCH

The screenshot displays the Lexis Advance Research History interface. At the top, there's a search bar with 'shep:800 f2d 111' and various filters. The main area is titled 'History' and features a 'Research Map' section. On the left, there's a 'Narrow By' sidebar with options like 'Search Within History', 'View By', 'Client', 'Date', and 'Show Trails'. The main map area shows a graphical trail of research steps: 'age discrimination', 'Cases', 'Supreme Court', and 'Removed: Sup Court'. A 'Shepard's@ Report' popup is open over a map icon, showing details for 'McNeil v. Economics Laboratory, Inc., 800 F.2d 111'. Below the map, there's a 'Topic Alert - Alternative Dispute Resolution' and another entry for 'agency rulemaking'. The interface includes various icons for adding to folders, sharing, and comparing results.

- 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 printer-friendly view and print. Click **More** for options.
- E** Compare 2 – 3 search results to find common documents—and perhaps expand your research. Click a map search icon and **Select search to compare results**. Repeat. Then click **Compare Search Results**. Your results open in a new window.
- F** Find similar relevant documents. Click a document icon in your map and **Select document to find similar results**. Then click **Find Similar Documents**. This is a fast way to compare relevant documents to find more, including ones you may not have reviewed yet.
- G** Filter your map. Filter your map by **date** and more. Search for **words** included in your map. You can also exclude specific searches, e.g., **trails**, on your map or change the trail order. Click **Reset map to default view** to clear filters.
- H** Re-run or save your work. Click a map icon and choose to **re-run** your search or **save a search to a Folder**.

RESEARCH COST EFFECTIVELY FOR EMPLOYERS

When using your employer’s paid subscription to Lexis Advance, documents outside their 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	▼	ⓘ
AAIA 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.)

<input type="checkbox"/>	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:



Reminders on purchased documents

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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