Lexis Advance®



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 adapts automatically to your mobile device.

Find more helpful Lexis Advance literature, videos & research tips

<u>lexisnexis.com/lawschool</u> 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: youtube.com/LexisNexisLawSchools

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2015 - 2016

START YOUR SEARCH: RED SEARCH BOX (HOME)

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

- Return to the home page. Click the Lexis Advance logo on any screen.
- (B) Access other products. Click the down arrow for access to Lexis Practice Advisor[®], Litigation Profile Suite, LexisNexis[®] Interactive Citation Workstation, *lexis.com[®]* and more.
- © Browse sources or legal topics. Click Browse. Select <u>Sources</u> or <u>Topics</u>. Drill through the hierarchy or search for specific sources or topics.
- **O** 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.
- ⑦ Link to Settings, Personalize your Lexis Advance experience, plus access Help, My Lexis™, Sign Out, etc. Also access Folders, Alerts and Notifications.
- **(6)** Enter your search words, find sources and more. As you type, the red search box offers suggested legal phrases, documents or sources. Enter a:
 - natural language search and click Search. No source selection is 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 as a filter. 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
- Refine your search upfront and <u>filter</u> 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 <u>search results</u>.
- ① Get there quicker! Come to this page for 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.

FILTER: REFINE YOUR SEARCH AND SAVE BROWSING TIME

B	Narrow by: United	States Supreme Court X			Clear 🛣
	Jurisdiction	U.S. Federal All None	States & Territories	All None	\bigcirc
E	Category	By Court United States Supreme Court Federal Courts of Appeal	☐ Alabama☐ Alaska☐ Arizona	 Maine Maryland Massachusetts 	 Rhode Island South Carolina South Dakota
F	Practice Area & Topic	Federal District Courts Bankruptcy Courts Tax Court	 Arkansas California Colorado 	 Michigan Minnesota Mississippi 	 Tennessee Texas Utah
G	Recent & Favorites	Military Courts Other Federal Courts	 Connecticut Delaware Dist. of Columbia 	MissouriMontanaNebraska	VermontVirgin IslandsVirginia
Ð	Advanced Search	By Circuit 1st Circuit 2nd Circuit 3rd Circuit 4th Circuit 5th Circuit 6th Circuit 7th Circuit 8th Circuit 9th Circuit 10th Circuit	 Florida Georgia Guam Hawali Idaho Illinois Indiana Iowa Kansas Puerto Rico 	 Nevada New Hampshire New Jersey New Mexico New York North Carolina North Dakota Northern Marianas Ohio Oklahoma 	 Washington West Virginia Wisconsin Wyoming
		 I1th Circuit D.C. Circuit Federal Circuit 	Kentucky Louisiana Include non-jurisdictio	Oregon Pennsylvania	ated federal content

Filter search results to limit the number of documents after a search. Or save time upfront 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.

- 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.
- Category options include all content types available, e.g., select to search only legislative sources and cases.

- Practice Area & Topic options include more than 40 practice areas.
- (G) Recent & Favorites options include up to 50 recent and favorite sources or source combinations, recent and favorite filter combinations, and recent and favorite legal topics selected from Browse Topics.
- Advanced Search helps you select search commands to easily create a terms & connectors search. Also link to citation formats for retrieving full-text documents.
- Click Search to run your desired search, using your selected filters.

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 two ways.

	Lexis Advance®	
I	age discrimination Filters •	Q. Search
Legal Phrases & Documents	age discrimination age discrimination in employment age discrimination in employment act of 1967 age discrimination in employment act (ne)	
Add Source as Filter	Larson on Employment Discrimination Get Documents Labor and Employment Law Table of Contents Get Documents Employment Law Deskbook Get Documents	urnal Jomain

- 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.

exis Advance [®] 🗸 😗 Browse 🔻	Enter terms, sources, a citation, or shep: to Shepardize®	1Filter - Q	Client: -None- 🔻	History 🔻	More 👻
A)					
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larrow By	A&D Watch				- ()
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Administrative Codes and 343 Regulations	Q* Add source as a search filter				<i>(i)</i>
Administrative Materials 2,718 Briefs Pleadings and Motions 382	Create a publication alert				(i)
Cases 408 Company and Einancial 103	AAA Employment Arbitration Rules and Mediation Procedures				• (i)
More					Ŭ
Select multiple	Table of Contents - AAA Employment Arbitration Rules and Media	ation Procedures			

- 2. It's easy to browse or search source listings from the top menu:
- 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.
- Inter a title or partial title. Suggestions are provided as you type. Click the gray magnifying glass to search.
- © **Filter sources** by content categories, jurisdictions, etc. Find what you need more quickly by selecting filters, e.g., News, then California.
- 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
- Select the **Add All These as Search Filters** button to choose all the sources on the screen for your search.
- 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

Lexis Advance® Research	🕄 Browse 🔻			Client: None ▼ History ▼ More ▼
Browse	A			×
Sources Topics Search for a topic All Topics • All Topics • Within Administrative Law Search B	Administrative Law Admiralty & Maritime Law Antitrust & Trade Law Banking Law Bankruptcy Law Civil Procedure Civil Rights Law Business & Corporate Law) (C))))))))))))))))))	Actions for Administrative Law Agency Adjudication Agency Investigations Agency Rulemaking General Overview Governmental Information Judicial Review Separation of Powers	 Actions for Agency Adjudication Get all documents for topic Q* Add topic as a search filter Create a topic alert View topic summary report Prehearing Activity Presiding Officers
	Commercial Law (UCC) Communications Law Computer & Internet Law Contracts Law Copyright Law Constitutional Law Criminal Law & Procedure	> > > > > >	Sovereign Immunity Company & Financial	 Review of Initial Decisions Agency Investigations Agency Rulemaking General Overview Governmental Information Judicial Review Separation of Powers

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.

- Search for specific topics or browse through the Lexis Advance legal topic hierarchy. Click Browse then select Topics.
- You can search for specific topics. Enter your search words and click Search.
- © 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.
- Use your topic in your research. Once you choose a topic, you can:
 - View Lexis Advance search results on this topic, e.g., 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 the Recent & Favorites list.

SEARCH RESULTS: FIND THE MOST RELEVANT DOCUMENTS FAST



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

- See the top relevant results for each content category. Click <u>Snapshot</u>. View the number of results for most content categories.
- Set up an <u>Alert</u> for your search—across content types, if you choose. Click the **bell** icon next to your search.
- © Select Actions to add a search to a Folder or to expand your search.
- 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 access.
- Print, download or email without opening documents. Check the box next to your document titles, then click the appropriate icon. Also create a printer-friendly page of results.
- Return to prior research tasks. Click History and select a prior search or document.
- Browse just the titles. Click on Title View to see an efficient list of your results.
- Sort documents. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc.

- ① 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.
 - Date, slide the timeline or enter dates. (Not shown.)
 - Adding more words to your search. Enter them in the Search within results box.
 - Narrow By options, e.g., publication status, source, practice area & topics, attorney, law firm, judge, most cited and keyword. 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. To remove the filter:** click the **X** in the blue box. Select and remove multiple filters. Bring up to three preferred jurisdictions and three courts to the top of your filters list; click Edit Settings under Narrow By.

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.

- ① 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.
- 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.

SNAPSHOT VIEW: THE MOST RELEVANT RESULTS ON ONE SCREEN

Snapshot	(A)	Snapshot	
Cases Statutes and Legislation Administrative Codes and Regulations Administrative Materials Secondary Materials Forms Forms Fieldings and Additions Univ Instructions Univ Instructions Univ Verdicits and Settlements Asxpert Witness Analysis Dockets Directories News	1.448 170 9 155 1.148 32 8.870 128 8.870 128 185 13 Get 544	Add to	Dump To: Stapshot section Cases (1.448) Statutes and Legislation (170) Administrative Codes and Regulations (9) Administrative Materials (155) Secondary Materials (1.148) Forms (32) Briefs, Pleadings and Motions (8,870) Jury Verdicts and Settlements (195) Expert Witness Analysis (13) Dockets Directories (6) News
Scientific Dompany and Financial Web	0 Get 327	3. Conway v. Hercules, Inc., 831 F. Supp. 354 Overview: In employee's action under the ADEA, employee bore burden of proving his entitlem including front pay, and the employer bore the burden of proving that the employee failed to mitig as that was an affirmative defense. View all Cases	Scientific (0) Company and Financial Web (327) gate his uamages. Court Delaware District Court Date Sep 27, 1993

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.

- In the Snapshot View, the top three results in 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. 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.
- © Click a document link to move to the full-text document.
- Quickly move to a specific type of content. Use the Jump To icon and pull-down list to see a different results section.
- If your research needs change, go to Settings > Lexis Advance Research > Results to change the first category that displays in your search results from Cases to Snapshot.

CASE SUMMARIES AND HEADNOTES: MAKING CLASS PREPARATION EASIER

Be more prepared to answer your professor's questions about a case.

Review the facts and legal issues covered in the cases you're assigned before you read them.

The case summary is divided into three parts:

- Procedural Posture: describes the case's procedural history (e.g., how this case arrived before this court).
- Overview: provides a brief review of the underlying facts, legal issues and the court's holding(s).
- Outcome: contains the ultimate procedural disposition of the issue(s).



Deliver a Case Summary

You can quickly download, email or print a case summary.



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

Add Notes A		
Folders		t by: Last modified (newest)
C Enter search terms Q	1. Recording Industry Association of America (RIAA) Exhibits to RIAA Comment	(Gottlieb, Steven) -
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- My Folders		Client
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G Policy Manua		Aug 29, 2014 09:50:15 a.m. EDT
Access Later (\$)	2. Selected text from : 17 USCS § 107	
Shared by Me (0)	Direct economic benefit is not required to establish	Type Selected Text
Shared by Others		Client -None-
items saved: 7		Last Modified Aug 29, 2014 09:39:40 a.m. EDT
	3. ABC, Inc. v. Aereo, Inc., 134 S. Ct. 2498	
	Shepard's™ Signal indicator	Туре
	As of Aug 29, 2014 Update Shepard's TH Signal	Document

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 Lexis Practice 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.

- 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.
- © Search within All Folders. Search for vital facts across all Folders and notes. Just enter your search words, e.g., front pay.
- Use Folder listings. 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.
- 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.
- Manage shared Folders and items, and view items shared with you by others.
- ① 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.
- ③ Shepard's Signal indicators. Ensure documents are good law. See immediately when a document was checked via Shepard's. Update if needed.
- (C) 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



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.

- Save the document to a Folder, print, deliver or share. Also request a printer-friendly version.
- (B) Create a direct link to quickly and easily share your full-text document. While scrolling within a document, the title and citation scroll with you, always in view.
- O Jump to specific document parts, e.g., opinion or headnotes. Move among search terms or reporter pages.
- Move among results documents. Click Results List to view your full results set.
- (E) 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.
- Copy the full-case citation for your work. Include parallel citations and a link to the full-text case. Format your citation with a variety of style formats.
- Check the Shepard's status immediately. See possible issues and move directly to the Shepard's report.
- (H) Select a reporter citation to view its pagination.
- ① Select-and use-vital text. When you select text, an options box displays. You can copy the text to paste it in your work; save the text to a Folder with optional

annotation; or search using the selected text. You can highlight selected text, with your choice of colors. Save the highlighted document to a Folder to retain your highlighting.

- ① Link to full-text documents cited. Just click the link.
- 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.
- Open the original source PDF and other available case documents.
- Come up to speed on 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 next to LexisNexis[®] headnotes. Click and link to Topic Summary Reports.
- W Highlight a passage that represents your specific legal 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.
- Return to the top of a page, with a single click. While scrolling, click on the Back to the Top arrow.

SHEPARD'S® CITATIONS SERVICE



- See treatment upfront. 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 <u>Citing Decisions</u>
 - Other Citing Sources such as treatises, annotated statutes, court documents and more
 - Table of Authorities, which shows the cases your case cited and their subsequent treatment
- Get an overview of subsequent history fast—in one sentence.
- O Alerts provide updates when the Shepard's status changes. You can select change type, e.g., negative analysis.
- (E) Get the big picture on citing references. Click Grid and see citing references in context over jurisdictions and time.
- 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.
- 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.

- ① Pinpoint citing cases' language. Get flag colors, a short description, a pinpoint page reference—and the case language in question.
- ③ See how citing cases have been treated subsequently by viewing their Shepard's Signal indicators.
- (※ Depth of Discussion bars quickly show how in-depth the discussion in this case is of the case you Shepardized[™].
- (D) Find on-point headnote language. Click a headnote of interest and move to similar language in the citing case.
- Review what each signal indicator means in the Shepard's Legend at the bottom of the screen.

SHEPARD'S® GRAPHICAL: MAP THE APPELLATE HISTORY

	Lexis Advance [®] Serowse ' Research Shepard's®: McNeil v. Ec	shep: 800 f2d 111 Filters Q Client-None- Histor conomics Laboratory, Inc., 800 F.2d 111 Parallel Citations Image: Client Citations Image: Client Citations	y ¥ More ¥
۵	Appellate History Citing Decisions Other Citing Sources	Appellate History (5) No negative subsequent appellate history	B List Map
	C D E Legend Display Option		*
	U.S. SUPREME COURT	Writ of periorani	
Legend ► Shepardized™ cita	tion Shepardized [™] citation s history tory analysis es assigned nd to the List view	Attimed by Attimed by McNeil V. Economics Laboratory, Inc., 800 F.2d 111 (1988) 7th Cir. III. Actions Open Document Show in list Show in list	
	Close		

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.

Over the Appellate history in List view. Click the **Appellate** History subtab. 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 the **List view**, click **List**.
- **© Print your map**. Get a printer-friendly display. Then click the **Print** icon.
- **(D)** To understand map icons, click Legend. For example, the location icon identifies where your case is on the map-the citation you Shepardized.

- (E) Remove map notations, e.g., Indirect history, and re-display the map.
- (E) Use these icons to zoom into the citation you Shepardized, move to a full-screen view or expand/contract your view, respectively.
- **©** 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



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.

- View citing references in List view. Click Citing Decisions. The list of citing cases is the default view.
- 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.
- Print your grid. Get a printer-friendly display. Then click the Print button.

- (c) Go to vital references in one step. Click a grid box and move to those cases in the List view.
- Filter by analysis phrase, jurisdiction or year, e.g., click 7th Circuit (75), to view those cases in the List view.
- **© Understand grid components.** Click **Legend** at the bottom of the screen. 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 in 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 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 a delivery icon and choose delivery options. 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, 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.
- **Print from most modern browsers**, like Safari[®] or Chrome[™]. No plug-ins are needed.

Plus choose from many delivery options and save a step later

After you select a delivery icon, 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® .WPD. 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, .WPD 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 "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
- 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 <u>Browse Sources</u>.
- 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.

Search Alert	Tips
Overview Monitor Deliver Share	
End	•
Aug 05, 2015	
Delivery type	
O Online only	
Email + Online	
Email address	
first.last@emailaddress.com	
Delivery format	
• HTML	
O Text	
Frequency	
Daily at 3:00 p.m	
O Business daily	
O Weekly	
O Monthly	
O As updates are available	~

- Overview Options: Select an Alert title, review/ edit search terms, add a Description and Note at any time.
- (9) 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.
- © Delivery 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.
- 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.



Lexis Advance [®] V S Bro Research	age discrimination in employment and front pay	Filters - Q Client:-None- + History + More +
Alerts (3) Actions -		
Narrow By	®	
Research		Sort by: Start date (newest) 💌
✓ Search Within Alerts	Mark results as read C Delete alert results	
Enter search terms	Q "lexis advance"	Originated In Research
	Filters	Type Search
• Type	Period	Client: -None-
Shepard's®	2 May 27, 2015 - May 27, 2016 1	Frequency As updates are available
 Select multiple ✓ Client 		Elivery Type Email + Online
-None-	³	
▼ Delivery Type		Originated In
Online	2 Any change	Research
Email	1 Period	Type Shepard's®
Select multiple	Feb 06, 2015 - Feb 06, 2016	Client: -None-
Frequency		Frequency Monthly on the 6th

Manage Alerts: edit, delete, pause, etc.

On the Alerts management screen, you can:

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 🗙

Monitor a publication for updates

Create a Publication Alert for the sources you rely on. When you select the <u>Get Documents</u> link, look for the Alert icon at the top of the source results screen.

- © Browse and delete all results quickly. Or keep the results and mark as read.
- 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 Alert 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

Research ~ 😵	Browse 🔻	construction or building and contractor /5 licens! and expir!	Filters - Q Client:	None- ▼ History ▼ Me
History Actions -				0
Narrow By		B List (271)		List Research
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Enter search terms	9,			Date Saved (Newes
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Today Yesterday Wednesday May 12, 2015 May 11, 2015 • More Select multiple	9 1 41 37 24	Content Type: All Content Types (Snapshot)) Jurisdiction: All Jurisdictions Practice Areas and Topics: All Practice Areas and Topics Search Type: Terms & Connectors Legal Phrase Equivalents: Excluded		Client Research Client -None- Date & time May 19, 2015 06:41:28 p.m. El
▼ Туре		2. construction or building and contractor /5 licens! an	d expir!	
Legal Search Document View	195 62	Content Type: All Content Types (Cases 🏲) Jurisdiction: All Jurisdictions		Originated In Research
Shepard's® Search Create Alert	5	Practice Areas and Topics: All Practice Areas and Topics Search Type:		Type Legal Search
Source Search	2	Terms & Connectors Legal Phrase Equivalents:		Client -None-
TOC View Topic Summary	2	Excluded		Date & time May 19, 2015
TOC Search	1			06:41:10 p.m. ED

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*? Quickly pick up where you left off by going to your History. And go back to your Search History to save useful searches to your Folders.

- 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.
- © View your search history in a graphical map. Click Research Map.
- Print your history. Get a printer-friendly list of searches. Then click the Print button.
- Sort your history. You can sort by date (oldest or newest first), type or search title (alphabetical or reverse alpha order).
- Filter history to display by date or date range, type of view, such as Document View or TOC, 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 (not shown). Remove the filter; just click the X in the blue box.
- **See search details upfront.** 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) Learn more about the History Map, icons and graphical trails.
- (B) Get a step-by-step graphical depiction of your prior research. Click Research Map to identify explored versus unexplored paths, possibly uncovering other relevant results.
- C Add your History Map to one of your Folders.
- Share your History Map via email or download. Request a printer-friendly view and print. Click More for options.
- 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.
- 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 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.
- Herun or save your work. Click a map icon and choose to rerun 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		0
AAA Labor Arbitration Awards*		0
AAACN Viewpoint	•	0
AANA Journal**		0

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.	A	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,	Jurisdiction US Federal
		2012)	Court Supreme Court
		Get it now! for \$96	Date Mar 27, 1991

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:

Listorier \$120	
Your Price: \$96	
Client ID: -None-	

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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- Live chat 8 A.M. to 1 A.M. at www.lexisadvance.com
- Your Account Executive on campus: visit lexisnexis.com/lawschool for contact information



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