

Lexis Advance® User Guide



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How do I search using Lexis Advance®?

There are several ways to perform legal research with Lexis Advance®. To begin your research, select **Client** at the top of the page to associate your research with a specific client or matter. Then search using one of the methods below.


When you enter a search, you don't need to enter your terms using terms and connectors or natural language guidelines because Lexis Advance automatically determines which type of search to perform from your search terms. For example, if you enter `budget and deficit`, Lexis Advance will run a terms and connectors search, because the connector "and" is part of the search.

Note:

For information on constructing a Boolean search query, see [Using Search Connectors \(*and, or, etc.*\) and Commands \(*atleast*\)](#). For information about segment searching, see [How do I search in specific segments?](#)

- [Search all content](#)
- [Restrict your search to a specific jurisdiction, category, or practice area](#)
- [Shepardize® a citation](#)
- [Resume previous research](#)
- [Restrict your search to specific sources](#)
- [Restrict your search to specific legal topics](#)
- [Search by citation](#)
- [Retrieve, print, or documents by citation](#)
- [Search archived codes](#)


How do I search all content?

1. Enter your search terms in the search box, using either [natural language](#) or [Boolean](#) search construction.
 - Legal phrases and documents - If the terms you are typing are closely related to a legal phrase or document, you'll see a list of suggestions you can select from. Click one of these if you want to see the results for the suggestion instead of what you are typing. The legal phrase or document name will replace the terms you were entering in the search box.
 - Sources - If the terms you are typing are closely related to a source name, you'll see a list of possible source names displayed beneath the search box, next to **Add Source as a Filter**. Select one of these if you want to search in the source. Your selections will display under the search box. Click **Clear** to remove them.
2. Click the search button ().

Note:

In general, the longer the search query, the less likely you are to find documents containing all the search terms you entered. Any query can result in zero documents being found, but very long queries are more likely to do so.

How do I restrict my search to a specific jurisdiction, category, or practice area?

1. Enter your search terms in the search box, using either [natural language](#) or [Boolean](#) search construction.
 - Legal phrases and documents - If the terms you are typing are closely related to a legal phrase or document, you'll see a list of suggestions you can select from. Click one of these if you want to see the results for the suggestion instead of what you are typing. The legal phrase or document name will replace the terms you were entering in the search box.
 - Sources - If the terms you are typing are closely related to a source name, you'll see a list of possible source names displayed beneath the search box, next to **Add Source as a Filter**. Select one of these if you want to search in the source. Your selections will display under the search box. Click **Clear** to remove them.
2. Select **Filters**.
3. Select **Jurisdictions**, **Category**, or **Practice & Topics** from the left pane.
4. Select the check boxes for the filters you want to use.
5. Click the search button ().


How do I *Shepardize*® a citation?

1. In the search box, type `shep` followed by a colon (:), followed by the document citation.

`shep: 800 F.2d 111`

`shep: 410 us 73`

Punctuation, spacing, and capitalization within the citation are optional. However, the colon following "shep" is mandatory in order for the system to run a *Shepard's*® search and not a regular search.

2. Click the search button ().

How do I restrict my search to a specific source?

1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Do one of the following:

| To... | Do This |
|---|--|
| Browse through all sources alphabetically | Select All Sources , then use the alphabetical listing to find the source you want. |
| Select a source by category | Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one. |

3. When you see the source you want to use, select it.
4. From the menu that opens, select **Add source as a search filter**. If you have selected any other filters for this search, they will be replaced by your selection.


How do I search in a specific topic?

1. Select **Browse** at the top of the page, next to Lexis Advance®
2. Select **Topics**.
3. When the topic list is displayed, do one of the following:

| To... | Do This |
|---|--|
| Browse for a topic | Select a topic name to display more detailed topics that are categorized under that name. |
| Search for a topic when you know the name | Type a topic name, or part of the name, in the Search for topics box and select Search . |

4. Select the topic you want to use.
5. Select the **Actions** drop-down menu.
6. Select **Add topic as a search filter**.

How do I find a document when I know the citation?

1. Enter the citation in the search box.
2. Click the search button ().

How do I retrieve or print multiple documents when I know their citations?

To enter multiple citations and download or print the documents or *Shepard's* reports for them, when you know the citations, follow these steps.

1. Select **Research** at the top of the page.
2. Select **Get & Print**.
3. Complete the form that displays.
4. Select **Go**.

How do I search archived codes?

You can search a collection of archived codes, including statutory codes, constitutions, administrative codes, municipal codes, and court rules.

On the home page:

1. Select **Archived Codes Search** on the **Archives** pod.
2. In the **Enter search terms** box on the **Search:Archived codes** page, type the words you want to search for.
3. Under **Narrow by**, select the category for the codes you want to search, the year or years to include in the search, and the jurisdiction, if desired.
4. Select **Search**.

Developing a Natural Language Search

To develop a natural language search, use terms that you might use when describing your research topic to another person. For example, to find articles about efforts in the fast food industry to use recyclable packaging, you might use this search:


What efforts has the fast food industry made to use recyclable packages?

Or, you can use just the most important terms and phrases, in any order.

recycle package fast food

How do I retrieve a document when I know its citation?

To retrieve a single document when you know its citation, follow these steps.

1. Enter the document citation in the search box.
2. Select .

To enter multiple citations and download or print the documents or *Shepard's*® reports for them, when you know the citations:

1. Select the down-pointing arrow next to **Lexis Advance**® at the top of the page.
2. Select **Get & Print**.
3. Complete the form that displays.
4. Select **Go**.

How do I *Shepardize*® a document when I know its citation?


Retrieving a *Shepard's*® report by citation can be done in a variety of ways.

The most common method is to enter "shep:" in the search box, followed by your citation, then press **ENTER** or click the search button.

You could also enter just the citation name in the search box, then click the *Shepard's* Signal™ indicator next to the document name.



How do I restrict my search using filters?

You can restrict your search to a specific [category](#), [jurisdiction](#), or [practice area and topic](#), so you have fewer results; you can also [restrict your search to a specific source](#) or [topic](#). When you get your results, you can narrow them further using the filters on your results page. To restrict your search, follow these steps:

1. Enter your search terms.
2. Select the down arrow () to the right of the **Search: Everything** button.
3. Select **Jurisdiction**, **Category**, or **Practice Areas & Topics**, from the **Narrow By:** pane on the left.
4. Select one or more check boxes in the areas you want to restrict your search to. For example, to restrict your results to case law, select the **Cases** check box in the **Category** filter.
5. Select more filters and make your selections, if you want to restrict your search further.
6. To use a filter from your **Recent & Favorites** for a search, select it. If you made any other filter selections for the search, they will be replaced. The selections you make from the filters are displayed next to **Narrow By** as you select them.
7. Select **Search**.

Note:

The filters you use are added to the **Recent & Favorites** pod. Open **Recent & Favorites** to:

- Select the star () next to a filter to make it a favorite.
- To remove the filter from your favorites, select the  next to it.

To save a filter to be used in future sessions, select **Settings** from the **More** drop-down list at the top of the page, then select **Lexis Advance Research** from the options on the left. Select **Retain search filters for future sessions**.

How do I restrict my search to a specific date or date range?

Enter your search terms and one of the following date restrictions in the search box:

| Restriction | Definition | Example |
|---------------------------------|--------------|--|
| = | Date is | inauguration and = 2/21/1992 |
| < | Date before | spanish w/3 currency and < 1990 |
| > | Date after | insurance w/3 premiums and > 1/20/2009 |
| <= | On or before | Sports w/3 bankruptcy and <= 01/1976 |
| >= | On or after | Boat and seizure and >= 5/23/1999 |
| > [begin date] and < [end date] | Date range | Mayor w/3 Peoria and > 01/01/1960 and < 12/31/1980 |

Note:

Use numbers, not words, to specify a month: Sports w/3 bankruptcy and <= 01/01/1976.

How do I restrict my search to a specific jurisdiction?

1. On the search form, enter your search terms in the search box.
2. Select the down arrow (▼) to the right of the **Search: Everything** button.
3. Select **Jurisdiction** under **Narrow By:** on the left.
4. Select one or more check boxes for the jurisdictions you want to restrict your search to. For example, to restrict your results to a Federal jurisdiction and the Ohio jurisdiction, select the check boxes for the **Federal** jurisdiction you want and for **Ohio**. The selections you make from the filters are displayed next to **Narrow By** as you select them. To remove a filter, select the ✕ next to it.
5. To include non-jurisdictional sources in your search, select **Include non-jurisdictional content**.
6. To include Federal sources in your search that are related to any jurisdictions you selected, select **Include related Federal content**.
7. Select the **Search** button.

Your results will contain documents only from the jurisdictions you selected.

Note:

The selections you make from Jurisdiction will be displayed on the search form and used for future searches until you change it.

What is Table of Contents browsing?



Note:

The Table of Contents is only available for publications having this structure, such as statutes and treatises.

In full document view, you can use the Table of Contents to display a document's location within a publication and navigate to other documents in that publication. For example, if you are viewing a specific Statute section, the Table of Contents displays the structure of the entire statute, showing the names of the sections before and after the one you are viewing.

From the results list view, you can display the Table of Contents for a publication by selecting the **View Table of Contents** link in the results list.

When the Table of Contents is displayed, you can:

- Select the right-facing arrow  to the left of a section to expand the section
- Search the headings and/or documents (or both) in the Table of Contents for specific search terms, publication names, or part of a name.
- Select the search icon  to the right of a section to search for specific search terms in that section.
- Select links in the Table of Contents to quickly view other sections of the publication.
- Display a document in the publication in a full-screen view.

When a section is open in the full-screen view, you can reopen the Table of Contents by selecting **Table of Contents** to the left of the document. Select it again to close it.

How do I restrict my search to a specific category?

1. On the search form, enter your search terms in the search box.
2. Select the down arrow (▼) to the right of the **Search: Everything** button.
3. Select **Category** from the **Narrow By:** pane on the left.
4. Select one or more check boxes for the categories you want to restrict your search to. For example, to restrict your results to cases, statutes, and secondary materials, select the check boxes for **Cases, Statutes & Legislation**, and **Secondary Materials**.
5. Select the **Search** button.

Your results will contain documents only from the categories you selected.

Note:

The selections you make from Categories will be displayed next to **Narrow By** on the Filters page and used for future searches until you change it.

How do I browse through all available topics?

1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Topics**.
3. Select a practice area, such as **Administrative Law**, **Family Law**, etc. from the list.
4. Continue to expand the selections until you see the topic you want.

Tip:

To find a topic faster, enter it in the **Search for a topic** box and click the search icon.


5. Select the topic you want to use.
6. Choose one of the following options for how you want to use the topic:

| Option | Description |
|------------------------------|---|
| Get documents | Choose this option if you want to view the documents associated with the topic. |
| Add topic as a search filter | Choose this option to include items in your search that are associated with this topic. |
| Create a topic alert | Choose this option if you want to be notified when updates to this topic are available. |
| View topic summary report | Choose this option if you want to view high-level information about the topic. |

How do I select a specific source to search in?

You can select a specific source using the steps below.

1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

| To... | Do This |
|---|--|
| Search for a source | Enter the name (or part of a name) of a source under Search for a source in the left pane, then select the search icon (). |
| Browse through all sources alphabetically | Select All Sources , then use the alphabetical listing to find the source you want. |
| Select a source by category | Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one. |

4. When you see the source you want to use, select it.
5. From the menu that is opened, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

The source name is added to the **Narrow By** pane.

How do I restrict my search to a specific source?

You can restrict your search to a specific source in one of two ways.

To restrict your search from the search box:

1. On the Lexis Advance® home page, type the name of a source into the Search box. As you type, possible source names are displayed beneath the search box, next to **Add Source as a Filter**.
2. Select the source you want to use.


Note:

If you have selected any other filters for this search, they will be replaced by your selection.

The source name is added next to **Narrow By** under **Filters**.

To restrict your search by selecting from a list of all sources:

1. On the home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

| To... | Do This |
|---|---|
| Search for a source | Enter the name (or part of a name) of a source under Search for a source in the left pane, then select the search icon (). |
| Browse through all sources alphabetically | Select All Sources , then use the alphabetical listing to find the source you want. |
| Select a source by category | Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one. |

4. When you see the source you want to use, select it.
5. From the menu that appears, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

How do I save a source as a favorite?

If there's a source you often search in, you can save it as a favorite for future searches, in one of two ways.

To save a source as a favorite from the source list:




1. On the Lexis Advance® home page, select the **Browse** drop-down menu at the top of the page.
2. Select **Sources**.
3. Do one of the following:

| To... | Do This |
|---|--|
| Browse through all sources alphabetically | Select All Sources , then use the alphabetical listing to find the source you want. |
| Select a source by category | Select a category, such as By Jurisdiction , By Practice Area , etc. from the list, then select a sub-category, if there is one. |

4. When you see the source you want to use, select it.
5. From the menu that opens, select **Add source as a search filter**.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.




6. On the search form, select **Filters**.
7. Select **Recent & Favorites** from the pane on the left.
8. Click the star () next to the source you want to save as a favorite. The star turns yellow () to indicate that the source has been saved as a favorite.
9. To remove the source from your favorites, select the  next to it.

To save a source as a favorite from the search box:

1. On the home page, type the name of a source into the Search box. As you type, possible source names are displayed beneath the search box, next to **Add Source as a Filter**.
2. Select the source you want to use.

Note:

If you have selected any other filters for this search, they will be replaced by your selection.

3. On the search form, select **Filters**.
4. Select **Recent & Favorites** from the pane on the left.
5. Click the star () next to the source you want to save as a favorite. The star turns yellow () to indicate that the source has been saved as a favorite.
6. To remove the source from your favorites, select the  next to it.

Using Search Connectors (*and, or, etc.*) and Commands (*atleast*)

Tip:

- To review all of the information about connectors and commands on a single page, see [Search Connectors Quick Reference Card](#).
- For information on how the wildcard characters * and ? are used in a search, see [Finding Variations of a Word](#).
- To understand connector priority, see [Connector Order and Priority](#).
- Familiar with WestlawNext™ connectors? For Lexis Advance® equivalents, see [Equivalents for WestlawNext™ Connectors](#).

Search connectors, such as *and*, *or*, *near*, and *not*, and commands, such as *atleast*, help narrow a search by defining relationships between your search terms.

Lexis Advance automatically interprets many common legal phrases, such as *limited liability partnership* or *summary judgment*, as phrases, rather than as individual search terms. However, if you want to be sure a phrase you are searching for is interpreted as a phrase, enclose it in quotation marks.

"determination of deficiency"

"right to work"

When you enter text into the *Shepard's*® **Narrow By Search Within Results** box and select **OK**, that text is processed as a terms and connectors search.

The following articles provide descriptions and examples for each connector.

/n Connector

Use the /n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious /3 dog
```

Note:

You can use the /n connector in the same way as the w/n connector. The two connectors operate the same way.

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|----------------|-------------------------------------|
| /3 - /5 | in approximately the same phrase |
| /25 | in approximately the same sentence |
| /75 | in approximately the same paragraph |

Tip:

Although you may choose any number for n, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple /n Connectors

Multiple /n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog /10 cat /5 fish
```

Searching for Common Legal Phrases

Lexis Advance automatically interprets many common legal phrases, such as `limited liability partnership` or `summary judgment`, as phrases, rather than as individual search terms. However, if you want to be sure a phrase you are searching for is interpreted as a phrase, enclose it in quotation marks.

`"right to work"`

Using ! to Find Variations of a Word

Use an exclamation mark (!) to find a root word plus all the words made by adding letters to the end of it. For example, employ! would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- There must be at least 3 characters prior to the ! or you may receive unexpected results.
- Use ! only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.

Using * to Find Variations of a Word

Use an asterisk (*) to find a root word plus all the words made by adding letters to the end of it. For example, employ* would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- Use * only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.
- You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.

Using ? to Find Variations of a Word

Use a question mark (?) to find variations of a word by replacing characters anywhere in the word, except the first character. Use one question mark for each character you wish to replace.

Examples:

- wom?n would find woman and women
- p??rson would find both the ea and the ie spelling of the name

and Connector

Use the `and` connector to find words that are far apart from one another or in different sections. Searches using `and` usually find more documents than searches using the `near` connector. As a general rule, use `and` when it doesn't matter where your search words appear in a document. Use the `near` connector when there is a connection between your search terms and you need to find the terms near each other.

For example, to find general information about budget deficits, you could use this search:

```
budget and deficit
```

However, to find documents that are relevant when your search terms are less specific, you may need to use the `near` connector. For example, the following search will find more relevant documents than if the `and` connector were used:

```
fiduciary near/1 duty near/10 breach
```

Note:

You can use an ampersand (&) in place of `and`. The two connectors operate the same way.

and not Connector

Use the `and not` connector to find documents in which a search word or phrase is to be excluded.

For example, the following search finds documents where the word "capital" occurs but the word "gains" does not.

```
capital and not gains
```

Because the exclusion covers the entire document, in this example, a document would be excluded if the word "gains" appears anywhere in the document.

You can exclude documents containing multiple words this way:

```
capital and not gains and not improvements
```

This example finds documents where the word "capital" occurs but the words "gains" and "improvements" do not.

Putting and not last

If you include `and not` in your search, it should be the last connector you use. Otherwise it may produce undesired results.

atleast Command

Use the `atleast` command to require that a term or terms appear "at least" so many times in a document. Use `atleast` when you want only documents that contain an in-depth discussion on a topic rather than just a mention.

For example, the following search requires references to CERCLA (the Comprehensive Environmental Response, Compensation, and Liability Act) to appear in every document at least 10 times:

```
atleast10(cercla)
```

You can use any number with the `atleast` command.

near/n Connector

Use the `near/n` connector to find documents with search words that appear within "n" words of each other. The value of "n" can be any number. Use `near/n` to join words and phrases that express parts of a single idea or to join closely-associated ideas.

Words or phrases linked by `near/n` must be in the same section (a specific part of a document). Either word may appear first.

For example, the following search finds documents in which both words appear in the same section, within three or fewer words of one another.

```
richard near/3 branson
```

It retrieves documents containing the words Richard Charles Nicholas Branson, Richard Branson and Branson, Richard.

Specifying the value of "n"

When choosing the value of *n*, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|------------------------------|-------------------------------------|
| <code>near/3 - near/5</code> | in approximately the same phrase |
| <code>near/25</code> | in approximately the same sentence |
| <code>near/75</code> | in approximately the same paragraph |

Tip:

Although you may choose a number for *n*, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple `near` Connectors

Multiple `near/n` connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog near/10 cat near/5 fish
```

onear/n Connector

Use the `onear/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime onear/3 compensation
```

`onear/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

Note:

You can use the `pre/n` connector in the same way as the `onear/n` connector. The two connectors operate the same way.

or Connector

Use the `or` connector to find documents that contain either or both of the words or phrases linked by `or`. Use the `or` connector to link search words that are synonyms, antonyms, alternative spellings, or abbreviations.

| | |
|---------------|---|
| Synonyms | ship or vessel or boat |
| Antonyms | reasonable or unreasonable |
| Alternatives | takeover or take over |
| Abbreviations | british broadcasting corporation or b.b.c. or bbc |

The search looks for the words or phrases linked by the `or` connector, not the word "or" itself. The words or phrases linked by `or` can be in any part of a document.

pre/n Connector

Use the `pre/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime pre/3 compensation
```

`pre/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

w/n Connector

Use the w/n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious w/3 dog
```

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|----------------|-------------------------------------|
| w/3 - w/5 | in approximately the same phrase |
| w/25 | in approximately the same sentence |
| w/75 | in approximately the same paragraph |

Tip:

Although you may choose any number for n, you may want to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple w/n Connectors

Multiple w/n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog w/10 cat w/5 fish
```


w/p or /p Connector

Use the w/p or /p (within paragraph) connector to find documents with search words that appear within the same paragraph, or within approximately 75 words of each other.

For example, the following example finds "retirement" within the same paragraph as "benefit":

```
retirement w/p benefit
```

The following example finds "subcontract" or "sub-contract" within the same paragraph as "architect":

```
subcontract or sub-contract /p architect
```

Note:

You can use w/para in place of /p or w/p if you wish. All 3 function the same way.

w/s or /s Connector

Use the w/s or /s (within sentence) connector to find documents with search words that appear within the same sentence, or within approximately 25 words of each other.

For example, the following finds "earnings" within the same sentence as "taxation":

earnings /s taxation

Note:

You can use w/sent in place of /s or w/s if you wish. All 3 function the same way.

w/seg Connector




Use the w/seg connector to find documents in which your search terms appear in the same segment (headline, body, etc.), or within approximately 100 words of each other.

For example, the following search finds documents where the word "unreported" and "income" appear in the same segment.

```
unreported w/seg income
```

Search Connectors Quick Reference Card

Tip:

You can save or print a copy of this page. To save the page as an RTF document, select . To save the page as a PDF document, select . To print the page, select .

How do I use search connectors?

Follow these steps to use search connectors to define relationships between your search terms.

1. On the search form, enter your search terms.
2. Enter one or more search connectors to join your search terms. For more information and example searches for each search connector, see [Using Search Connectors \(*and, or, etc.*\) and Commands \(*atleast*\)](#).
3. Click the **Search** button.

and Connector

Use the `and` connector to find words that are far apart from one another or in different sections. Searches using `and` usually find more documents than searches using the `near` connector. As a general rule, use `and` when it doesn't matter where your search words appear in a document. Use the `near` connector when there is a connection between your search terms and you need to find the terms near each other.

For example, to find general information about budget deficits, you could use this search:

```
budget and deficit
```

However, to find documents that are relevant when your search terms are less specific, you may need to use the `near` connector. For example, the following search will find more relevant documents than if the `and` connector were used:

```
fiduciary near/1 duty near/10 breach
```

Note:

You can use an ampersand (&) in place of `and`. The two connectors operate the same way.

atleast Command

Use the `atleast` command to require that a term or terms appear "at least" so many times in a document. Use `atleast` when you want only documents that contain an in-depth discussion on a topic rather than just a mention.

For example, the following search requires references to CERCLA (the Comprehensive Environmental Response, Compensation, and Liability Act) to appear in every document at least 10 times:

```
atleast10(cercla)
```

You can use any number with the `atleast` command.

or Connector

Use the `or` connector to find documents that contain either or both of the words or phrases linked by `or`. Use the `or` connector to link search words that are synonyms, antonyms, alternative spellings, or abbreviations.

| | |
|---------------|---|
| Synonyms | ship or vessel or boat |
| Antonyms | reasonable or unreasonable |
| Alternatives | takeover or take over |
| Abbreviations | british broadcasting corporation or b.b.c. or bbc |

The search looks for the words or phrases linked by the `or` connector, not the word "or" itself. The words or phrases linked by `or` can be in any part of a document.

and not Connector

Use the `and not` connector to find documents in which a search word or phrase is to be excluded.

For example, the following search finds documents where the word "capital" occurs but the word "gains" does not.

```
capital and not gains
```

Because the exclusion covers the entire document, in this example, a document would be excluded if the word "gains" appears anywhere in the document.

You can exclude documents containing multiple words this way:

```
capital and not gains and not improvements
```

This example finds documents where the word "capital" occurs but the words "gains" and "improvements" do not.

Putting and not last

If you include `and not` in your search, it should be the last connector you use. Otherwise it may produce undesired results.

w/n Connector

Use the w/n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious w/3 dog
```

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|----------------|-------------------------------------|
| w/3 - w/5 | in approximately the same phrase |
| w/25 | in approximately the same sentence |
| w/75 | in approximately the same paragraph |

Tip:

Although you may choose any number for n, you may want to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple w/n Connectors

Multiple w/n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog w/10 cat w/5 fish
```

pre/n Connector

Use the `pre/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime pre/3 compensation
```

`pre/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

/n Connector

Use the /n connector to find documents in which the first word appears within "n" words of the second one.

For example, the following search finds documents where the word "vicious" occurs within 3 words of "dog".

```
vicious /3 dog
```

Note:

You can use the /n connector in the same way as the w/n connector. The two connectors operate the same way.

Specifying the value of "n"

When choosing the value of n, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|----------------|-------------------------------------|
| /3 - /5 | in approximately the same phrase |
| /25 | in approximately the same sentence |
| /75 | in approximately the same paragraph |

Tip:

Although you may choose any number for n, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple /n Connectors

Multiple /n connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog /10 cat /5 fish
```

w/p or /p Connector

Use the w/p or /p (within paragraph) connector to find documents with search words that appear within the same paragraph, or within approximately 75 words of each other.

For example, the following example finds "retirement" within the same paragraph as "benefit":

```
retirement w/p benefit
```

The following example finds "subcontract" or "sub-contract" within the same paragraph as "architect":

```
subcontract or sub-contract /p architect
```

Note:

You can use w/para in place of /p or w/p if you wish. All 3 function the same way.

w/s or /s Connector

Use the w/s or /s (within sentence) connector to find documents with search words that appear within the same sentence, or within approximately 25 words of each other.

For example, the following finds "earnings" within the same sentence as "taxation":

earnings /s taxation

Note:

You can use w/sent in place of /s or w/s if you wish. All 3 function the same way.

w/seg Connector

Use the w/seg connector to find documents in which your search terms appear in the same segment (headline, body, etc.), or within approximately 100 words of each other.

For example, the following search finds documents where the word "unreported" and "income" appear in the same segment.

```
unreported w/seg income
```

Using ! to Find Variations of a Word

Use an exclamation mark (!) to find a root word plus all the words made by adding letters to the end of it. For example, employ! would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- There must be at least 3 characters prior to the ! or you may receive unexpected results.
- Use ! only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.

Using * to Find Variations of a Word

Use an asterisk (*) to find a root word plus all the words made by adding letters to the end of it. For example, employ* would find variations on the term employ such as employee, employer, employment, and their plurals.

Note:

- Use * only to find unique roots; fir! will find fired, firing and fires, but will also find first, which you may not want.
- You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.

Using ? to Find Variations of a Word

Use a question mark (?) to find variations of a word by replacing characters anywhere in the word, except the first character. Use one question mark for each character you wish to replace.

Examples:

- wom?n would find woman and women
- p??rson would find both the ea and the ie spelling of the name

near/n Connector

Use the `near/n` connector to find documents with search words that appear within "n" words of each other. The value of "n" can be any number. Use `near/n` to join words and phrases that express parts of a single idea or to join closely-associated ideas.

Words or phrases linked by `near/n` must be in the same section (a specific part of a document). Either word may appear first.

For example, the following search finds documents in which both words appear in the same section, within three or fewer words of one another.

```
richard near/3 branson
```

It retrieves documents containing the words Richard Charles Nicholas Branson, Richard Branson and Branson, Richard.

Specifying the value of "n"

When choosing the value of *n*, these guidelines may prove useful:

| Choose this... | For search words to appear here... |
|------------------------------|-------------------------------------|
| <code>near/3 - near/5</code> | in approximately the same phrase |
| <code>near/25</code> | in approximately the same sentence |
| <code>near/75</code> | in approximately the same paragraph |

Tip:

Although you may choose a number for *n*, you may wish to choose a number less than 100. Choosing a number greater than 100 is likely to retrieve documents in which your search words are used in unrelated contexts.

Using Multiple `near` Connectors

Multiple `near/n` connectors operate from left to right, regardless of the value of "n". The following search finds "dog" within 10 words of "cat", and then "fish" within 5 words of either "dog" or "cat":

```
dog near/10 cat near/5 fish
```

onear/n Connector

Use the `onear/n` connector to find documents in which the first word precedes the second by not more than "n" words.

For example, the following search finds documents where the word "overtime" occurs within 3 words of "compensation".

```
overtime onear/3 compensation
```

`onear/n` is especially useful in situations where a different word order significantly alters meaning. For example, "summary judgment" is significantly different from "judgment summary."

Note:

You can use the `pre/n` connector in the same way as the `onear/n` connector. The two connectors operate the same way.

Finding Variations of a Word

You can use the asterisk (*) wildcard character to search for variations of a word, making your search shorter and simpler.

- Use the asterisk at the end of a root word to find the root word plus all the words made by adding letters to the end of it. For example, `acqui*` would find variations on the term `acquire` such as `acquires`, `acquired`, `acquiring` and `acquisition`.

Tip:

- Use * only on unique roots; `fir*` will find `fired`, `firing` and `fires`, but will also find `first`, which you may not want.
 - You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.
- Use the ? to represent one or more characters within a word. For example, `int??net` would find `internet` and `intranet`.

Finding Variations of a Word

You can use the asterisk (*) wildcard character to search for variations of a word, making your search shorter and simpler.

- Use the asterisk at the end of a root word to find the root word plus all the words made by adding letters to the end of it. For example, `acqui*` would find variations on the term `acquire` such as `acquires`, `acquired`, `acquiring` and `acquisition`.

Tip:

- Use * only on unique roots; `fir*` will find `fired`, `firing` and `fires`, but will also find `first`, which you may not want.
 - You can use an exclamation mark (!) in place of the * if you wish. Both function in the same way, but there must be at least 3 characters in front of the ! or you might receive unexpected results.
- Use the ? to represent one or more characters within a word. For example, `int??net` would find `internet` and `intranet`.

Connector Order and Priority

Lexis Advance® uses the following order of operations for connector searches:

1. not / and not
2. or
3. proximity connectors¹, such as near/n, onear/n, w/n, pre/n, /s, /p, w/sent, w/para
4. and

Example: bankrupt! w/25 discharg! and student or college or education w/5 loan

This search query is processed in the following way:

1. or has the highest priority, so it operates first. In this example, student or college or education! is processed as a unit, which is created by the or connector.
2. w/25 operates next and creates a unit of the bankrupt! w/25 discharg! terms.
3. w/5 ties together the term loan and the student or college or education! unit.
4. and, with the lowest priority, operates last and links the units formed in the second and third items above.

¹ Proximity connectors operate from left to right, regardless of the number associated with the connector. This is also the case if you use the same connector more than once in your search string.

Lexis Advance® Equivalents for WestlawNext™ Connectors

| If You Use this Connector to Search WestlawNext™ | Use this Connector to Search Lexis Advance® |
|--|---|
| "search terms" (quotation marks enclosing a phrase – finds the exact phrase) | "search terms" (quotation marks enclosing a phrase – finds the exact phrase) |
| <i>and</i> (alternately, &) | and (alternately, &) |
| a space between terms (to replace <i>or</i>) | or |
| /p | /p or w/para Note: The w/para proximity connector will include "noise words" in the proximity of your two search terms. You can use w/para or w/p in place of /p if you wish. All 3 function the same way. |
| +p | pre/n (the number for n should be 50 or less) |
| /s | /s or w/sent Note: The w/sent connector will include "noise words" in the proximity of your two search terms. You can use w/sent or w/s in place of /s if you wish. All 3 function the same way. |
| +s | pre/n (the number for n should be 15 or less) |
| /n | w/n |
| +n | pre/n |
| but not (alternately, %) | and not |

What is a results list?

Your search results may be presented in one of the following ways:

- For searches that retrieve multiple documents, your results are displayed as a list. On the left side of the page, you can view options for narrowing your results to a specific category type. If you want to view at-a-glance details for every category all at once, you can view the **Snapshot** page.

Your search (or a portion of it, depending on how long it is) appears at the top of the page next to **Results for:**. A smaller search box is also displayed at the top of the page, so you continue your research.

- If you retrieved an individual document by entering its citation in the search box, that document is displayed at the top of the results list, with other documents containing that citation displayed below it. If the document is included your subscription, it opens automatically. If it is outside your subscription, you'll have the option of accessing it for a fee.
- Multiple documents retrieved by a single citation (such as table cases) appear as a list of documents.
- If you enter multiple citations in the search box, your results are displayed as a list of documents.
- If you used the **Search for (citation)** option in **About This Document** to retrieve all documents referencing a specific citation, the documents will be displayed as a list of results, regardless of any specific content type, jurisdiction, practice area, or "Start in" selections you made before your search.

Use the **Narrow By** pane on the left to narrow your results by entering search terms in the **Search Within Results** filter, or by several specific criteria, such as jurisdiction, court, timeline, and so on, depending on what kind of search you ran and what types of content your results contain. By default, the jurisdiction, location, and court filters are displayed by number of results (highest - lowest). You can change this to display them in alphabetical order instead, in **Settings**.

You can also use the search form at the top of the page to change your search terms, or change the content types, jurisdictions, or topics you want to search and run the search again.

Results List Page

Your search results may be presented in one of the following ways:



- For searches that retrieve multiple documents, your results display as a list of documents in the categories you selected when you selected the filters for your search. The number of results found for each category is displayed following the category name, and next to each filter in the pane on the left. If more than 10,000 results were found for a category, **(10,000+)** is displayed. The first category listed is the category you chose to start in. To display the documents for a different category, select it from the left pane.


Your search terms appear at the top left of the page below the navigation bar.

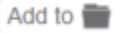







- If you retrieved an individual document by entering its citation in the search box, it is displayed as the only document in the results list. To see a list of other documents that reference the citation, select the **Results List** link at the top of the page.
- Multiple documents retrieved by a single citation (such as table cases) display as a list of documents on the results page.
- If you enter multiple citations in the search box, your results display as a list of documents on a results page.

Select any highlighted search term in a document in your results list to open that document, scrolled to the location of the search term.

The search form is displayed at the top of your results so you can modify the terms, content, or topics you want to search, and run the search again.

| Value | Description |
|---|---|
| Results for [your search terms] | Displays your search terms. |
|  | Click to save your search to run automatically on a schedule you specify. |
| Actions | <p>Click this to display a list of additional things you can do with your results.</p> <p>Add search to folder Select this to save your search to a folder.</p> <p>Run search as terms & connectors Run the search as a terms & connectors search.</p> <p>Include legal phrase equivalents Expand the search results to include all legal phrase equivalents for the selected keyword.</p> <p>+ Expanded results Expand your results to include all the documents containing any of your search terms. (This option displays only if you ran a Natural Language search.)</p> <p>- Fewer results Display only the results that contain all of your search terms. (This option displays only if you selected + Expanded results from the Actions menu after a Natural Language search.)</p> <p>Link to this page Select to display the permanent link for the page so you can copy it to save or share it with others.</p> |
|  | To display the results page with each document showing the title and several lines of text to help provide context, select this icon. You can set a default for this view in Settings . |

| | |
|---|--|
|  | <p>To display the results page with each document showing the title and 4 additional pieces of information (such as the court, jurisdiction, or judgment date), select this icon. You can set a default for this view in Settings.</p> |
| <p>Sort by</p> | <p>By default, the documents in your results list are sorted by relevance.</p> <p>Select an option from this list to sort in a different order. You can select from relevance, document title (A to Z or Z to A), jurisdiction, court, or date (newest to oldest or oldest to newest).</p> |
| <p>Jump to</p> | <p>In the Snapshot view, use the Jump to drop-down list to display the results for the other categories you selected when you selected the filters for your search.</p> |
| <p>Narrow By</p> | <p>If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the Narrow By pane on the left side of your results.</p> <ul style="list-style-type: none"> ■ Use the Search Within Results filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: <code>dog bite liability</code> and your answer set is very large, you might enter the terms: <code>assumed risk</code> to narrow the results to only documents that also contain those terms. ■ Use the other filters, such as Content Type, Jurisdiction, Timeline, Sources, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. You can select whether you want location-related filters (jurisdiction, location, and court) to be sorted by number of results or alphabetically by default, in Settings. You can also choose to have the three jurisdictions and locations you use most often listed first. <p>To select several criteria in a category, use Select multiple.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ If you are viewing your results in the Cases category, Category is not displayed in the Narrow By pane because your results are already narrowed to the Cases category and can't be narrowed any further. However, some categories, such as Analytical Materials can be further narrowed down, so the subcategories are displayed under Category when you are viewing your results from the Analytical Materials category. ■ The categories and headings in the Narrow By pane depend on the kind of search you ran. For example, a legal search may have headings for Federal and specific states under the Jurisdiction category. Results for a <i>Shepard's</i>® search may have headings for Warning, Caution, Positive, etc. under the Analysis category. ■ Documents may appear in more than one category. For example, case law documents would appear in the "Cases" category, in one of the jurisdictions, and would also contain a number of keywords and/or citations. <p>To return to a previous results set after filtering one or more times, select the Clear link under your selections at the top of the Narrow By pane to close that version. When you have closed all the versions, your original results are displayed on the right side of the results view.</p> |
| <p>Practice Areas & Topics</p> | <p>Select specific practice areas and topics available to display search results associated with the selected practice area or topic.</p> |

| | |
|--|---|
| | <p>Tip: Click the Select multiple link to select multiple practice areas or topics.</p> |
| Timeline | <p>To select a specific date range and display the number of results within it, you can do one of the following:</p> <ul style="list-style-type: none"> ■ Slide the indicator toward the center of the diagram from either end and select OK ■ Enter a beginning and ending date in mm/dd/yyyy format and select OK |
| Most Cited | <p>A list of links to related results for the most cited documents related to your search.</p> <p>Tip: Click More to view more results, or select Less to view fewer results.</p> |
| Keyword | <p>A list of links to related results for similar keyword searches.</p> <p>Tip: Click More to view more results, or select Less to view fewer results.</p> |
| Did you mean: | <p>You may see suggested search terms here if there are terms closely related to those you entered that might improve your search results. Click the suggested terms if you want to see the results for those terms instead of what you entered. The suggested terms will replace those you entered in the search box.</p> |
|  | <p>To select one or more documents to add to a folder, select the check boxes next to the documents in the list, and then select the Add to folder icon at the top of the column.</p> |
|  | <p>To select one or more documents to print to an attached printer, select the check boxes next to the documents in the list, and then select the Printer icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p> |
|  | <p>To select one or more documents to save to your computer, select the check boxes next to the documents in the list, and then select the Save icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p> |
|  | <p>To select one or more documents to email, select the check boxes next to the documents in the list, and then select the Email icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p> |
|  | <p>To select one or more documents to send to Dropbox, select the check boxes next to the documents in the list, and then select the Send to Dropbox icon from the delivery menu. (Delivery options are consolidated under the icon for the last delivery option you used.)</p> |
|  | <p>To get a document outside of your subscription, select this icon.</p> |
|  Printable page | <p>Click to view the list in a printer-friendly format.</p> |
|  | <p>Click the right or left arrow to display the previous or next group of documents in your results.</p> |
| Document Title | <p>To view the full document, select the document title. To sort your results alphabetically by document title, select the column header. Click it again to restore it to the original order.</p> |
| View Table of Contents | <p>Select this to view the table of contents for the document, if the document has one.</p> |
| Jurisdiction | <p>The jurisdiction of the document.</p> |
| Court | <p>The court of the document.</p> |

| | |
|---------------|---|
| Date | The date of the document. |
| 1 2 3 4 5 ... | Indicates which page in your results set you are viewing. Click a different page number to display that page, or use the right or left arrows to scroll through your results set. |

How do I narrow or filter my results after a search?

If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the **Narrow By** pane on the left side of your results.

- Use the **Search Within Results** filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: *dog bite liability* and your answer set is very large, you might enter the terms: *assumed risk* to narrow the results to only documents that also contain those terms.
- Use the other filters, such as **Category**, **Jurisdiction**, **Timeline**, **Sources**, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. The filters that are available for narrowing your results depend on what kind of search you ran and what types of content your results contain. For example, if you ran a legal search, the filters in the **Narrow By** pane include **Cases**, **Statutes**, **Court**, **Jurisdiction**, etc. If you ran a *Shepard's*[®] search, the filters include **Jurisdiction**, **Analysis**, etc.

See the table below for more information about using filters.

Note:

- If you are viewing your results in the **Cases** category, **Category** is not displayed in the **Narrow By** pane because your results are already narrowed to the Cases category and can't be narrowed any further. However, some categories, such as **Analytical Materials** can be further narrowed down, so the subcategories are displayed under **Category** when you are viewing your results in the Analytical Materials category.
- Documents may appear in more than one category. For example, case law documents would appear in the "Cases" category, in one of the jurisdictions, one of the sources, and would also contain a number of keywords and/or citations.

After running a search and reviewing your results:

| If you want to... | Do this |
|---|---|
| Narrow your results to documents containing specific search terms or a citation | Enter your search terms or a citation in the box under Search Within Results and select OK . |
| Narrow your results by the other filters in the Narrow By pane | Click the item under a filter heading (such as Category , Legal Topic , Jurisdiction , etc.) that you want to restrict your results to, and select OK . For example, to restrict your results to case law only, select Cases under Category . |
| Narrow by more than one category under a filter | Click Select multiple , select the check boxes for the categories you want to narrow your results to, and select OK . |
| Restrict your results to a particular date range | Under the Timeline filter of the Narrow By pane, use your mouse to move either of the sliders to the left or right until the date range you want is displayed, or enter the dates in the the year fields, and select OK . |
| Return to a previous results set | Click the X next to your selections at the top of the Narrow By pane to close that version of your results. |
| Return to your original results after narrowing them one or more times | Click the Clear link at the top of the Narrow By pane. |
| Find your original or Search Within Results search terms in a document | Open a document from your results, and select the terms you want to find from the Navigate tool at the top right side of the document. |

Note:

Each time you narrow your results, the results are cumulative. For example, you can narrow your results to **Cases**, then to a specific time line within those cases, and then to a specific jurisdiction or court within those cases in the timeline.



How do I save my research?

The search terms, documents, and other activities from your research are automatically saved in your history for up to 90 days. You can access them by selecting the **History** drop-down list at the top of any page. Your last 5 searches are also available from the **History** pod on the Lexis Advance® home page.

If you want to save your search terms or documents from your results for an unlimited time, you can save them to **Folders**.

To do this:

1. After running a search and reviewing your results, do one of the following:

| To... | Do This |
|--|--|
| Save a search | From the results list, select the Actions drop-down list (near the top of the page) and select Add search to folder . The Add to Folder dialog box appears. Proceed to Step 3. |
| Save one or more documents from the results list | <ol style="list-style-type: none"> a. Select the check box next to each document you want to save, then select the Add to folder () icon at the top of your results. A list of options for saving the document appears. b. To save the document or documents to a specific folder you've already created and used recently, choose that folder from the list. The documents are saved to the selected folder, and no further steps are required. c. To save the document set to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below. |
| Save a document from the full document view | <ol style="list-style-type: none"> a. While viewing the full document, select the Add to folder () icon at the top of the document. A list of options for saving the document appears. b. To save the document to a specific folder you've already created and used recently, choose that folder from the list. The document is saved to the selected folder, and no further steps are required. c. To save the document to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below. |

2. At the **Selected Documents** tab of the **Add to Folder** form that appears, enter a title for the items you want to save (select **Edit all titles** to do this), or keep the title that is displayed.
3. At the **Save Options** tab, choose any of the following options, depending on whether you're saving a search or saving a document:

| Option | Description |
|--|--|
| Save Search (Add search to folder option) | Enter a different name for the search in the Save Search box. |
| Store Narrow By selections for (Add search to folder option) | Choose whether to save your Store Narrow By selections by choosing Category I'm currently viewing or All categories . |
| Selected documents / Results list for | Choose whether you want to save the documents you've specifically selected or the full results list for your search. |
| <p>Note:</p> <p>If you are viewing the full document, the</p> | |

| Option | Description |
|--------------------------------------|---|
| Results list option isn't available. | |
| Notes | Type any notes about your research in the Notes box. |
| Save In | Select the folder you want to add the items to, or select the Create New Folder button to create a new folder. |

4. To share the folder with other users, select the **Share with Others** tab and then enter the name or email address of the person you want to share with. Then click **Add**.
5. Click **Save** to save the items.

To retrieve your saved items, select the **Folders** link from **More** drop-down list at the top of any page or select the item from the **Folders** pod on the home page.

What's the difference between "Expanded Results" and "Fewer Results"?

When you run a natural language search on Lexis Advance®, the **Actions** menu at the top of your results will have an option that says either **Expanded results** or **Fewer results**. The option that is displayed depends on what your results list contains.

When you select the option, the number of documents in your results list will change. If you select **Expanded results**, your results list will expand to include all the documents containing any of your search terms. If you select **Fewer results**, your results list will change to retrieve only the top results.

You can control which kind of results list is displayed first every time you search, in **Settings > Lexis Advance® Research** under **Preferred Results Set Display**.

Terms and connectors searches are not affected by this option. If you run a search using terms and connectors, or select **Run search as terms & connectors** from the **Actions** menu at the top of your results, the **Expanded results** and **Fewer results** options are not available.

How do I get back to my previous results after narrowing them one or more times?

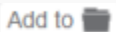




- To return to previous versions of your results one step at a time, select the Remove icon (✕) next to each of your selections at the top of the **Narrow By** pane.
- To return to your original results after narrowing them one or more times, select the **Clear** link at the top of the **Narrow By** pane.

Full Document Page



When you select a document from your results, the full text of the document is displayed. You can return to your results list by selecting **Results List** at the top of the page. Use **Previous Document** and **Next Document** to display the previous or next document in your results.


The **Shepard's®** pane to the right of the document lets you *Shepardize®* the document. **About This Document** provides more information about the document and access to the Legal Issue Trail™ so you can track the legal issues addressed in the case law document.

The search form is displayed at the top of your results so you can modify the terms, content, or topics you want to search, and run the search again if you wish.

| Value | Description |
|---|---|
|  | Select this to save the document to a folder within Lexis Advance® so you can quickly access it again later. |
|  | Select this to open the document as a PDF that you can save or print to an attached printer. |
|  | Select this to save the document to your computer. |
|  | Select this to email the document. |
|  | Select this to display a text-only version of the document for printing, without any graphics, navigation bars, or options on the page. |
| Shepard's Signal™ indicator | Indicates the value of the case as a precedent. You can select the indicator to <i>Shepardize</i> the case and display the current <i>Shepard's®</i> report with a list of other legal authorities that have cited your case. (To see a definition of the signal indicator, leave your mouse pointer over the signal for a few seconds.) |
| Document Title | The title of the document. |
| Copy Citation | Select this to copy the document citation (including the pinpoint cite, if any) to the clipboard so you can paste it into a word processor document, email, etc. For more information, see How do I copy a citation to the clipboard? |
| Tools | <p>While reviewing the document, you can select a section of text, then select any of these tools from the menu that appears:</p> <p>Copy (Quick) Select this option to copy the highlighted text and its citation without reviewing all of the options available for copying and formatting. The text and citation will be copied using the system's default settings for the specified style guide. You can then paste the text into any text-editing application.</p> <p>Copy (Advanced) Select this option to display the Copy Selected Text to Clipboard dialog box, where you can choose different options that will be used to format the citation associated with the text you are copying. See How do I copy text to the clipboard? for details.</p> <p>Add to folder Save the text to a folder.</p> <p>Add to search Select this to search for documents that contain text similar to the text you selected. For more information, see How do I search based on text I have selected?</p> |

| | |
|------------|--|
| | <p>Annotate Annotate the text.</p> <p>Highlight Highlight the text.</p> |
| Jump to... | <p>Click the down arrow to display specific parts of the document that you can navigate to quickly. Sections of the document may include the following (not all sections will appear in every document):</p> <p>Sections</p> <p>Top of document Select this to go to the top of the document.</p> <p>Reporter If multiple reporters are listed, you can select a different reporter name to display the document in that reporter. You can also select a different reporter from the drop-down list at the bottom of the page.</p> <p>Subsequent history Subsequent history of the case.</p> <p>Prior history Prior history of the case.</p> <p>Core terms Important words and phrases that appear within the document.</p> <p>Disposition Disposition of the case.</p> <p>Case Summary Case summary of the case, including the Procedural Posture, the Overview, and the Outcome of a case law document. Case summaries appear at the top of a document when it is displayed in the full view and can help you quickly determine whether to read the case in detail or review the next case in your results.</p> <p>Procedural Posture Procedural Posture section of the Case Law Summary.</p> <p>Overview Overview section of the Case Law Summary.</p> <p>Outcome Outcome section of the Case Law Summary.</p> <p>LexisNexis® Headnotes LexisNexis® Headnotes identify the major points of law found in an opinion, expressed in the actual language of the court.</p> <p>Each LexisNexis Headnote is numbered (such as HN#1) and shows a down arrow next to the text. If you select the down arrow or the LexisNexis Headnote number, you'll jump to the location of that headnote in the actual body of the case. At that location, an up arrow is displayed; selecting this returns you to the list of LexisNexis Headnotes, where that headnote occurs.</p> <p>Headnotes/Syllabus The abstract or summary of a point of law.</p> <p>Summary The summary of the case.</p> <p>Counsel Names of the legal counsel representing each party in the case recorded in the document.</p> <p>Judges Names and titles of the judges presiding over the case recorded in the document.</p> <p>Opinion by Name of the judge delivering the opinion recorded in the document.</p> |



| | |
|--|---|
| | <p>Opinion Text of the opinion delivered by the judge listed under Opinionby.</p> <p>Concur by Name of the judge delivering the concurring opinion recorded in the document.</p> <p>Dissent by Name of the judge delivering the dissenting opinion recorded in the document.</p> <p>Dissent Text of the dissenting opinion delivered by the judge listed under Dissentby.</p> <p>Navigate</p> <p>Navigate Select All Terms or select one of your search terms from the drop-down list and select the right or left arrows to go backward or forward in the document to specific search terms. If you select Activate Passages under Legal Issue Trail in the right pane, you will also see Passages displayed here as an optional way to navigate (from one activated passage to the next).</p> <p>Pages</p> <p>Reporter Page Select the right or left arrows to page through the document using the pagination of the reporter that is currently selected.</p> |
| Results List | Select this to display your results list. |
| Previous Document | Select this to display the previous document in your results list. |
| Next Document | Select this to display the next document in your results list. |
| Reading View () | Select this button to display the document in reading view. In this view, only a few tools will be available for working with the document. To access the full range of tools again, click the Reading View button () again. |
| <i>Shepard's</i> ® | The <i>Shepard's</i> ® pane shows information information about your document, including whether prior history is available, citing decisions, and other citing sources. |
| <i>Shepardize</i> ® this document | Select this to <i>Shepardize</i> the document. <i>Shepardizing</i> ™ the current citation verifies whether the case is still good and lists other cases that have cited your case, in a report. |
| About This Document | <p>This area contains links to information related to the case, plus several types of documents (the document types that appear under About This Document depend on what is available for the document you're viewing).</p> <p>Original Source Image Select this to open a PDF document of the official version of the case.</p> <p>Case File Select View Case File to open the supporting documents related to this case as the case moves through the litigation process (from trial through appeals). Supporting documents include:</p> <ul style="list-style-type: none"> ■ Cases ■ Briefs, pleadings, and motions ■ Jury verdicts ■ Dockets ■ Expert witness testimonies and reports |

| | |
|--|--|
| | <p>Topic Summaries Select View reports to open a summary of a legal topic, including definitions of terms related to the topic and links to the full text of seminal cases heard on the topic.</p> <p>Annotations Select from the following options:</p> <ul style="list-style-type: none"> ■ Select View parts to view the different parts of the statute. ■ Select Search for [search term] within annotations to view the locations within the statute where the search terms are used. <p>Related Court Materials Dockets, Briefs, Motions, and Pleadings related to the document.</p> <p>Dockets Select this link to select from a list of the dockets related to the case that you can view.</p> <p>Briefs Select this for the written legal arguments stating the legal reasons for a case based on statutes, regulations, case precedents, legal texts, and reasoning applied to facts in the particular situation.</p> <p>Motions Select this for the formal written requests made to the judge by a party in the case.</p> <p>Case Analysis Contains expert analysis of the case.</p> <p>Emerging Issues Analysis Select this to open a document containing analysis by eminent experts.</p> <p>Legal Issue Trail - Activate Passages Select this to display a list of cases that cite to the case you are viewing, as well as cases your case has cited, for a specific legal issue or point of law. You can use the Legal Issue Trail to quickly review the citing documents and reason-for-citing (RFC) passages in them to aid in determining the value of the current case for the legal issue you are researching.</p> |
| Back to Top button () | Select this button, which always appears at the bottom the window, to scroll the page you are viewing back to the top. |

How do I save a document from my results to a folder?

After running a search and reviewing your results:

1. Do one of the following:

| To... | Do This |
|--|--|
| Save one or more documents from the results list | <ol style="list-style-type: none"> a. Select the check box next to each document you want to save, then select the Add to folder () icon at the top of your results. A list of options for saving the document appears. b. To save the document or documents to a specific folder you've already created and used recently, choose that folder from the list. The documents are saved to the selected folder, and no further steps are required. c. To save the document set to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below. |
| Save a document from the full document view | <ol style="list-style-type: none"> a. While viewing the full document, select the Add to folder () icon at the top of the document. A list of options for saving the document appears. b. To save the document to a specific folder you've already created and used recently, choose that folder from the list. The document is saved to the selected folder, and no further steps are required. c. To save the document to a new folder or a folder that's not appearing in your recently used list, select Choose a folder. Then proceed to step 2, below. |

2. At the **Add to Folder** dialog box, click the **Selected Documents** tab to review the documents you have selected. If you want to remove a document from a list that contains multiple documents, clear its check box.

Note:

To edit a title for a document, select **Edit all titles**, click in the box for the document you want to rename, and then enter the new text.

3. Select the **Save Options** tab to specify how you want the document to be saved:
 - To select whether to save the **Selected Documents** or your **Results list**, select the appropriate option.
 - To include a note with the saved documents, enter it in the **Notes** box.
 - To create a new folder for the document, select the folder where you want the new folder to be saved and then click **Create New Folder**.
 - To save the document or documents to a specific folder, select it in the list.
4. To share the folder with other users, select the **Share With Others** tab and then enter the name or email address of the person you want to share with. Then click **Add**.
5. Click **Save** to save your changes and save the document or documents to the folder.

The items will be saved for you to access from the **Folders** link in the **More** drop-down list at the top of the page, or from the **Folders** pod on the Lexis Advance® home page.

How do I download my results or documents?

You can download documents selected from your results list, or download a document you have open.

Note:



See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on downloading any attachments associated with your delivery.

To do this:

1. Choose whether you want to download a single document, or download the results list:

| Option | Description |
|-------------------------------|--|
| To download the results list | While viewing your results list, select the documents you want to download or don't select any documents to download the first 250 results in your list. |
| To download a single document | While viewing the results list, open the specific document you want to download. |

2. Click the drop-down list next to your last-used delivery icon. (For example, if you printed something, the Print icon will appear on the toolbar, with the drop-down arrow next to the icon.)
3. Choose one of the following options from the **Download** group:

| Option | Description |
|---|---|
| Download (current settings)  | Select this option if you want to use the default download options and download the selected documents immediately. |
| Choose new settings  | Select this option if you want to choose your download options before saving the documents to your computer. Once you select this option, you can complete the download form. For detailed information about completing the form, see Download Page . |

Download Page

You can download either your results list or an individual document. To do this, provide the information for each tab of the **Download** dialog box. Details about each item on the dialog box are provided below.

Note:

- Different options may be available depending on what type of document you are downloading.
- To view a list of documents you have already downloaded, select the **History** drop-down list in the global navigation bar and view the **Research Map**. Your document download is shown in the list of your activities (indicated using the type **Download**). Click this **Download** link and choose **Retrieve Items** from the **Actions** list to view your options for retrieving it.

| Value | Description |
|----------------------------|--|
| Selected Documents (n) tab | The document titles of the documents you selected to download. If you want to remove any documents before downloading them, you can clear them at this tab. |
| Basic Options tab | <p>What do you want to download? Select one of the following options, depending on whether you're downloading a results list or documents:</p> <ul style="list-style-type: none"> ■ Selected documents (n) - Select this to download all the documents you selected. <div style="border: 1px dashed orange; padding: 5px; margin: 5px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are downloading. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Document attachments only (where available) - If any documents you want to download contain attachments, you can choose to download only those attachments (and not the related documents). ■ Results list for: "search term" - Select this to download the results list (not the documents themselves). ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to download the full profile report. (Once you select this option, you must decide if you want to download just the charts and graphs, or if you want to download charts and graphs and the results list.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Document type Select the format in which you would like the documents to be downloaded.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Downloads the documents in .pdf document. Files downloaded in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Downloads the documents in Microsoft Word 2007 format.¹ ■ WordPerfect-compatible (.WP) - Downloads the document in WordPerfect-compatible format. ■ LexisNexis® CaseMap - Downloads the documents in LexisNexis® CaseMap format. |

Note:

If you are downloading documents in CaseMap format, any attachments associated with the documents will be ignored, even if you select to include attachments with the download.

When downloading multiple documents

Select one of the following options:

- **Group and save documents as a single file** - Select this to format all the documents you selected into a single file.
- **Save as individual files** - Select this to format each document you selected in separate files.

Compress files in .ZIP format

Select this check box if you want to download the files in a compressed (ZIP) file format.

Tip:

Compressed files take up less space on your computer's local drive. Files saved in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.

Filename

Enter a filename for the downloaded file.

Download destination

Enter the destination where you want the file to be downloaded on your local or network drive, or select **Browse** to browse to a location. For example, enter:

C:\Clients\SmithProject\Cases

Formatting Options tab

Include the following in the delivered document:

- **Cover page** - Select this if you want an introductory cover page as the first page in your document.
- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your downloaded document.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

| | |
|------------------------------|---|
| | <p>Tip: The Times New Roman font is best for cases, statutory materials, and any long documents that are typically read in printed form. Courier is best for tables and other types of content that don't display well with varying font widths.</p> <p>Font size Select the desired font size for your documents.</p> <p>Line spacing Choose either single or double spacing for your documents.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ Double-spacing is not recommended for documents using dual column format. ■ Double-spacing is not applied to tables, case citations, or spreadsheets. <p>Styling</p> <ul style="list-style-type: none"> ■ Bold search terms - Select this if you want pagination to appear in bold type in your documents. ■ Italicize search terms - Select this if you want your search terms to appear in italic type in your documents. ■ Underline search terms - Select this if you want your search terms underlined. ■ Bold reporter page numbers - Select this if you want page numbers from the associated reporter to appear in bold type. |
| Content-Specific Options tab | <p>Statutes Select Include annotations to include any annotations that are associated with the statutes.</p> <p>Deliver full case document Select this option to deliver the full case document, along with the following options:</p> <ul style="list-style-type: none"> ■ Show Shepard's Signal™ indicators - Select this to include the <i>Shepard's</i> Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law". ■ Show Headnotes - Select this to include the headnotes for the case with each document. ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column. |
| Download | Click this to download your documents. |

| | |
|--------|---|
| Cancel | Click this to return to your search results without downloading your documents. |
|--------|---|

¹ Once the document is saved to disk and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.

How do I email my results or documents?

You can email documents selected from your results list, or a document you have open, to yourself or others.


Note:

See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on emailing any attachments associated with your delivery.

To do this:

1. Choose whether you want to email a single document, or email the results list:

| Option | Description |
|----------------------------|--|
| To email the results list | While viewing your results list, select the documents you want to email or don't select any documents to email the first 250 results in your list. |
| To email a single document | While viewing the results list, open the specific document you want to email. |

2. Click the delivery icon drop-down list in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose **Email** () from the list of options.
4. Complete the email form and select **Email**. For detailed information about completing the form, see [email documents page](#).

Email Page

You can email either your results list or an individual document. To do this, provide the information for each tab of the **Email** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are emailing.

| Value | Description |
|----------------------------|---|
| Selected Documents (n) tab | Lists the document titles of the documents you selected to email. If you want to remove any documents from the email delivery, you can clear them at this tab. |
| Basic Options tab | <p>What do you want to email? Select one of the following options, depending on whether you're viewing a results list or a specific document:</p> <ul style="list-style-type: none"> ■ Selected documents (n) - Select this to email all the documents you selected. <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are emailing. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> <ul style="list-style-type: none"> ■ Document attachments only (where available) - If any documents you want to email contain attachments, you can choose to email only those attachments (and not the related documents). ■ Results list for "search term" - Select this to email the results list (not the documents themselves). ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to email the full profile report. (Once you select this option, you must decide if you want to email just the charts and graphs, or if you want to email charts and graphs and the results list.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) ■ Include document attachments, where available - If any of the documents you want to email contain attachments, you can include those attachments in the delivery. (If you want to email <i>just</i> attachments, select the Document attachments only option, above.) <p>Document type Select the format in which you would like the documents to be emailed.</p> <p>Note: If you are emailing attachments, they will be delivered in their native format and the following options will not be applicable.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Emails the documents in a single .pdf document. Files downloaded in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Emails the documents in Microsoft Word 2007 format.¹ ■ WordPerfect-compatible (.WP) - Emails the document in WordPerfect-compatible format. |

- **LexisNexis® CaseMap** - Emails the documents in LexisNexis® CaseMap format.

Note:

If you are emailing documents in CaseMap format, any attachments associated with the documents will be ignored, even if you select to include attachments with the email message.

When attaching multiple documents

Select one of the following options:

- **Group and save documents as a single file** - Select this to format all the documents you selected into a single file.
- **Save as individual files** - Select this to format each document you selected in separate files.

Compress files in .ZIP format

Select this check box if you want to send the files in a compressed (ZIP) file format.

Tip:

Why would you choose to compress your files? Some email servers are unable to accept large file sizes, so smaller, compressed files are more likely to be received. Additionally, compressed files take up less space in the recipient's mailbox. Finally, when downloading, compressed files take up less space on your computer's local drive. Files sent in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.

Filename

Specifies the name associated with the emailed file. You can accept the default or change it.

To

Enter up to 5 recipients' email addresses, separated by a semicolon (;).

Subject

Enter the text you want to appear on the subject line of the email.

Notes

Enter any notes you want to appear in the body of the email, above the document text. You can use the associated options to apply bold, italic, or underline formatting to text in the note.

Formatting Options tab

Include the following in the delivered document:

- **Cover page** - Select this if you want an introductory cover page as the first page in your document.
- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your document attachment.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want

included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

- Tip:

The **Times New Roman** font is best for cases, statutory materials, and any long documents that are typically read in printed form. **Courier** is best for tables and other types of content that don't display well with varying font widths.

Font size

Select the desired font size for your documents.

Line spacing

Choose either single or double spacing for your documents.

- Note:

- Double-spacing is not recommended for documents using dual column format.
- Double-spacing is not applied to tables, case citations, or spreadsheets.

Styling

- **Bold search terms** - Select this if you want pagination to appear in bold type in your documents.
- **Italicize search terms** - Select this if you want your search terms to appear in italic type in your documents.
- **Underline search terms** - Select this if you want your search terms underlined.
- **Bold reporter page numbers** - Select this if you want page numbers from the associated reporter to appear in bold type.

Content-Specific Options tab

Statutes

Select **Include annotations** to include any annotations that are associated with the statutes.

Deliver full case document

Select this option to deliver the full case document, along with the following options:

- **Show Shepard's Signal™ indicators** - Select this to include the *Shepard's* Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law".
- **Show Headnotes** - Select this to include the headnotes for the case with each document.
- **Show Core Terms** - Select this to include the core terms for the case with each document.
- **Show Case Summary** - Select this to include the case summary with each document.

Deliver Case Summary only

Choose this option to deliver only the case summary.

- Note:

If no case summary for a delivered document exists, the document will be delivered instead.

Number of Columns

Choose one of the following:

| | |
|--------|---|
| | <ul style="list-style-type: none">■ Dual - Select this to save case law documents in dual column format.■ Single - Select this to save documents formatted in a single column. |
| Email | Click this to email your documents. |
| Cancel | Click this to return to your search results without emailing your documents. |

¹ Once the document is saved to disk and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.

How do I print my results or documents?

Lexis Advance® allows you to print PDF versions of any document you have open, or selected documents from a results list.

Note:



See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on printing any attachments associated with your delivery.

To do this:

1. Choose whether you want to print a single document, or print the results list:

| Option | Description |
|----------------------------|---|
| To print the results list | While viewing your results list, select the documents you want to print. Note: When you select multiple documents this way, Lexis Advance will group them in a single PDF file for printing. |
| To print a single document | While viewing the results list, open the specific document you want to print. |

2. Click the delivery icon drop-down list in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose one of the following options from the **Print** group:

| Option | Description |
|--|---|
| Print (current settings)  | Select this option if you want to use the default printing options and print the selected documents immediately. When available, the last-used printer name is listed along with the option. |
| Choose new settings  | Select this option if you want to choose your printing options before printing the documents. Once you select this option, you can complete the printing form. For detailed information about completing the form, see Print Page . |

Note:

Depending on your default printer selection, you may be prompted with other options for delivering the document. For example, if you have specified Microsoft XPS Document Writer as your default printer, you will be prompted to save the document, which you can then print.

Print Page

Caution:

To have documents automatically printed when using Internet Explorer 8, you must first install Adobe Reader. Visit <https://get.adobe.com/reader/> to download the latest version.

You can print either your results list or an individual document. To do this, provide the information for each tab of the **Print** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are printing.

| Value | Description |
|----------------------------|--|
| Selected Documents (n) tab | The document titles of the documents you selected to print. If you want to remove any documents before printing them, you can clear them at this tab. |
| Basic Options tab | <p>What do you want to print? Select one of the following options:</p> <ul style="list-style-type: none"> ■ Selected documents (n) - Select this to print all the documents you selected. <div style="border: 1px dashed orange; padding: 5px; margin: 5px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are printing. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Document attachments only (where available) - If any documents you want to print contain attachments, you can choose to print only those attachments (and not the related documents). ■ Results list for "search term" - Select this to print the results list (not the documents themselves). ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to print the full profile report. (Once you select this option, you must decide if you want to print just the charts and graphs, or if you want to print charts and graphs and the results list.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Printer type Select one of the following options:</p> <div style="border: 1px dashed orange; padding: 5px; margin: 5px 0;"> <p>Note: Depending on your default printer selection, you may be prompted with other options for delivering the document. For example, if you have specified Microsoft XPS Document Writer as your default printer, you will be prompted to save the document, which you can then print.</p> </div> <ul style="list-style-type: none"> ■ Attached printer - The documents will be printed on your attached printer. ■ LexisNexis® printer - The document will be printed using the LexisNexis print utility, which streamlines the print and download request process. |
| Formatting Options tab | <p>Include the following in the delivered document:</p> <ul style="list-style-type: none"> ■ Cover page - Select this if you want an introductory cover page as the first page in your document. ■ LexisNexis® logo - Select this if you want LexisNexis® branding in your printed document attachment. |

- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

Tip:

The **Times New Roman** font is best for cases, statutory materials, and any long documents that are typically read in printed form. **Courier** is best for tables and other types of content that don't display well with varying font widths.

Font size

Select the desired font size for your documents.

Line spacing

Choose either single or double spacing for your documents.

Note:

- Double-spacing is not recommended for documents using dual column format.
- Double-spacing is not applied to tables, case citations, or spreadsheets.

Styling

- **Bold search terms** - Select this if you want pagination to appear in bold type in your documents.
- **Italicize search terms** - Select this if you want your search terms to appear in italic type in your documents.
- **Underline search terms** - Select this if you want your search terms underlined.
- **Bold reporter page numbers** - Select this if you want page numbers from the associated reporter to appear in bold type.

Content-Specific Options tab

Statutes

Select **Include annotations** to include any annotations that are associated with the statutes.

Deliver full case document

Select this option to deliver the full case document, along with the following options:

- **Show Shepard's Signal™ indicators** - Select this to include the *Shepard's* Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law".
- **Show Headnotes** - Select this to include the headnotes for the case with each document.

| | |
|--------|--|
| | <ul style="list-style-type: none"> ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column. |
| Print | Click this to print your documents. |
| Cancel | Click this to return to your search results without printing your documents. |

How do I send my results or documents to Dropbox?


Lexis Advance® allows you to send either documents you have open, or selected documents from a results list, to Dropbox, which is a third-party cloud storage application. (If you do not have a Dropbox account, visit www.dropbox.com to create a free account, or [take a Dropbox tour](#).)

To do this:

1. Choose whether you want to send a single document to Dropbox, or send the results list:

| Option | Description |
|--------------------------------------|--|
| To send the results list to Dropbox | While viewing your results list, select the documents you want to send. |
| To send a single document to Dropbox | While viewing the results list, open the specific document you want to send. |

2. Click the delivery icon in the delivery toolbar. (Which icon appears depends on the last type of delivery you performed.) A drop-down list of options appears.
3. Choose one of the following options:

| Option | Description |
|--|---|
| Send to Dropbox (current settings)  | Select this option if you want to use the last-used Dropbox options and send the selected documents immediately. |
| Send to Dropbox (choose new settings) | Select this option if you want to choose your Dropbox delivery options before sending the documents. Once you select this option, you will be guided through the Dropbox sign-in and delivery process. Follow the on-screen prompts to complete these steps. For detailed information about completing the form, see Send to Dropbox Page . |

Note:

See [How do I download, print, email, and send to Dropbox the document attachments associated with my results?](#) for details on including attachments with your delivery to Dropbox.

Send to Dropbox Page

Note:

To send documents to Dropbox, you must first set up a Dropbox account (if you have not done so already). Visit www.dropbox.com to create a free account, or [take a Dropbox tour](#).

You can send either your results list or an individual document to Dropbox. To do this, provide the information for each tab of the **Send to Dropbox** dialog box. Details about each item on the dialog box are provided below.

Note:

Different options may be available depending on what type of document you are sending to Dropbox.

| Value | Description |
|----------------------------|---|
| Selected Documents (n) tab | The document titles of the documents you selected to send to Dropbox. If you want to remove any documents before sending them, you can clear them at this tab. |
| Basic Options tab | <p>What do you want to send to Dropbox? Select one of the following options:</p> <ul style="list-style-type: none"> ■ Selected documents (n) - Select this to send all the documents you selected to Dropbox. <div style="border: 1px dashed yellow; padding: 5px; margin: 5px 0;"> <p>Note: Select Include document attachments, where available to also include any attached documents associated with the items you are sending. See How do I download, print, email, and send to Dropbox the document attachments associated with my results? for details.</p> </div> <ul style="list-style-type: none"> ■ Document attachments only (where available) - If any documents you want to send contain attachments, you can choose to send only those attachments (and not the related documents). ■ Results list for "search term" - Select this to send the results list (not the documents themselves). ■ Profile Suite Report or Verdict & Settlement Analyzer Report - Select this to send the full profile report. (Once you select this option, you must decide if you want to send just the charts and graphs, or if you want to send charts and graphs and the results list.) (Litigation Profile Suite or Verdict & Settlement Analyzer users only.) <p>Document type Select the format in which you would like the documents to be sent to Dropbox.</p> <ul style="list-style-type: none"> ■ Portable Document Format (.PDF) - Sends the documents in .pdf document. Files sent in .pdf format can be opened and viewed using a PDF viewer, such as Adobe® Acrobat Reader. (Acrobat Reader is an application that may be downloaded free if you do not already have it.) ■ Microsoft Word-compatible (.DOCX) - Sends the documents in Microsoft Word 2007 format.¹ ■ WordPerfect-compatible (.WP) - Sends the document in WordPerfect-compatible format. ■ LexisNexis® CaseMap - Sends the documents in LexisNexis® CaseMap format. |

Note:

If you are saving documents in CaseMap format, any attachments associated with the documents will be ignored, even if you select to include attachments with the delivery.

When sending multiple documents to Dropbox

Select one of the following options:

- **Group and save documents as a single file** - Select this to format all the documents you selected into a single file.
- **Save as individual files** - Select this to format each document you selected in separate files.

Compress files in .ZIP format

Select this check box if you want to send the files to Dropbox in a compressed (ZIP) file format.

Tip:

Compressed files take up less space on your computer's local drive. Files saved in ZIP format can be opened and viewed using any file compression application. You can search the Internet for a list of programs (both paid and free) you can use to do this.

Filename

Enter a filename for the saved file.

Dropbox Account

Shows the sign-in information you've used to link Lexis Advance to your Dropbox account. If you have not yet established this connection, please finish completing the **Send to Dropbox** form you are currently working on and click **Send** to initiate access.

Formatting Options tab

Include the following in the delivered document:

- **Cover page** - Select this if you want an introductory cover page as the first page in your document.
- **LexisNexis® logo** - Select this if you want LexisNexis® branding in your document attachment.
- **First and last name on cover page and within footer** - Select this to include both your first name and last name on the cover page and in the footer of your documents.
- **Page numbering in document** - Select a position for the page number from the related options.
- **Embedded references as links** - Select to embed citations and other references within the document and hyperlink them. (Select **Italicize embedded legal citations** if you want the embedded legal cites to appear in italic type in your documents).
- **Users' annotations, highlights, and notes** - Select to include document markup from the user, and then specify what type of markup you want included: edits from all users (including your own) or just edits made by others (and not you).

Font type

Select the font to use in your documents.

| | |
|------------------------------|---|
| | <p>Tip: The Times New Roman font is best for cases, statutory materials, and any long documents that are typically read in printed form. Courier is best for tables and other types of content that don't display well with varying font widths.</p> <p>Font size Select the desired font size for your documents.</p> <p>Line spacing Choose either single or double spacing for your documents.</p> <p>Note:</p> <ul style="list-style-type: none"> ■ Double-spacing is not recommended for documents using dual column format. ■ Double-spacing is not applied to tables, case citations, or spreadsheets. <p>Styling</p> <ul style="list-style-type: none"> ■ Bold search terms - Select this if you want pagination to appear in bold type in your documents. ■ Italicize search terms - Select this if you want your search terms to appear in italic type in your documents. ■ Underline search terms - Select this if you want your search terms underlined. ■ Bold reporter page numbers - Select this if you want page numbers from the associated reporter to appear in bold type. |
| Content-Specific Options tab | <p>Statutes Select Include annotations to include any annotations that are associated with the statutes.</p> <p>Deliver full case document Select this option to deliver the full case document, along with the following options:</p> <ul style="list-style-type: none"> ■ Show Shepard's Signal™ indicators - Select this to include the <i>Shepard's</i> Signal indicator symbol next to cites in the document. These indicators help you understand whether the cite references "good law". ■ Show Headnotes - Select this to include the headnotes for the case with each document. ■ Show Core Terms - Select this to include the core terms for the case with each document. ■ Show Case Summary - Select this to include the case summary with each document. <p>Deliver Case Summary only Choose this option to deliver only the case summary.</p> <p>Note: If no case summary for a delivered document exists, the document will be delivered instead.</p> <p>Number of Columns Choose one of the following:</p> <ul style="list-style-type: none"> ■ Dual - Select this to save case law documents in dual column format. ■ Single - Select this to save documents formatted in a single column. |
| Send | Click this to send your documents to Dropbox. |

| | |
|--------|--|
| Cancel | Click this to return to your search results without sending your documents to Dropbox. |
|--------|--|

¹ Once the document is saved and you are viewing it in Microsoft® Word, you can view any of the LexisNexis legal links in the footer by first double-clicking on the footer. Once you do this, the footer (along with the links in it) become active. From here, to open the corresponding web page, press Ctrl as you select the specific link you want to view.





How do I download, print, email, and send to Dropbox the document attachments associated with my results?

When downloading, printing, emailing, or sending to Dropbox documents that have attachments, you can choose to deliver *only* those attachments, or just include them with their associated documents.

To do this:

1. Select the document or results list you want to deliver (download, print, email, or send to Dropbox):

| Option | Description |
|------------------------------|--|
| To deliver the results list | While viewing your results list, select the documents you want to deliver (or don't select any results to deliver the full list of results). |
| To deliver a single document | While viewing the results list, open the specific document you want to deliver. |

2. Click the delivery icon for the task you want to perform from the delivery drop-down list. (For example, click one of the following icons: **Download** () , **Print** () , **Email** () or **Send to Dropbox** (). A drop-down list of options appears.
3. Choose **Choose new settings**. The appropriate delivery dialog box appears.
4. Click the **Basic Options** tab. The view changes to show your options for delivering your research.
5. In the **What do you want to download/print/email/send to Dropbox?** group, select one of the following options, depending on whether you want to deliver documents with their attachments or just attachments:
 - **Selected documents**, followed by **Include document attachments, where available** - Select these options to deliver the documents along with any attachments associated with the documents.
 - **Document attachments only** - Select this option to deliver just the attachments for the documents or results you are viewing.
6. Select any other delivery-related options you want and complete the delivery.

How do I create an alert?



You can create an alert, which is a search that runs automatically and notifies you of any results. You can specify how often the alert is run.

Tip:

To get the best, on-target alert results, refine your search before saving it as an alert. Here are some suggestions:

- Use search terms that are specific to your research, joined by connectors to define the relationships of the search terms. For example, `medical negligence or clinical negligence`
- Avoid terms that are too general, such as `illness` or `behavior`.
- Filter your results before creating your alert. On the results page, select from the filters in the left pane to specify the jurisdiction, time frame, practice area, and so on, that you want to focus on.

To create an alert:

1. Run a search or *Shepardize*® a citation.
2. When you have the results you want, complete one of the following steps:
 - From your search results, select the alert icon () above your results.
 - From a *Shepard's*® report, select the alert icon ().

The Alert dialog box appears.

3. Provide the information required on the form. (Using this form, you can specify how often you want to be notified of any results, how you want to receive the results, and other options. See [Create New Search Alert Page](#) for information about each of the fields on this form.)

You can review all of your alerts by choosing the **View all alerts** in the **Alerts** pod on the Lexis Advance® home page. You can also choose **Alerts** from the **More** drop-down list, located at the top of any page.

How do I view the results of an alert?

After you've created an alert, you can view the results of any searches that alert performs for you.

To view your results:

- Do one of the following:
 - On the Lexis Advance® home page, select the **View all alerts** link in the **Alerts** pod. The Alerts page appears.
 - Choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:

- When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.
- Once you are viewing your alert results, select the alert name for which you want to view the results.

How do I edit an alert?

You can edit an existing alert and change your selections for the following options:

- Title
- Changes the alert is monitoring for (*Shepard's Alert*® searches only)
- Client
- How you want this citation to be monitored
- How often you want to be notified of any results
- Duration of the alert
- Delivery options
- Sharing options

To edit an alert:

1. While viewing your alerts results list, locate the alert you want to edit.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Click the **Edit** button under the title of the alert. The Alert dialog box appears.
3. Make whatever changes you need and select **Save**.

Note:

See [Edit Alert Page](#) for a description of the options available at this dialog box.

Edit Alert Page

Use this form to edit an existing alert. You can change your selections for these options:

- Title
- Client
- How often you are notified of any results
- Duration of the alert
- Delivery options
- Sharing options

| Value | Description |
|--------------|---|
| Overview tab | <p>Title Keep the alert name that is displayed, or give it a name that you will use later to retrieve it.</p> <p>Search terms Lists the terms that were used in the search.</p> <p>Search type Indicates that this is a search alert.</p> <p>Client Either select Recent client and choose a client you've recently used from the drop-down list, or select New client to enter the name of a new client.</p> |
| Monitor tab | <p>Category Indicates which content types the alert will monitor for new documents. Select the content types you want the alert to monitor. The content types displayed are the ones you selected when you searched, plus your Narrowed By items from your results.</p> <p>Select all / Clear all Use these options to select or clear all categories at once.</p> |
| Deliver tab | <p>Duration Enter dates in the Start and End boxes (or select from the calendars) to indicate how long you want this alert to run.</p> <p>Delivery Type You can choose online-only delivery or email and online delivery. If you select email, enter your Email address and in the Delivery format group, choose whether you want the email to be delivered in HTML or text format.</p> <p>Frequency Select how often you want to be notified of any results.</p> <p>Note: Between notifications, you can go online at any time to view your results.</p> <p>Daily Each day of the week.</p> <p>Business daily Each day from Monday through Friday.</p> <p>Weekly Once a week, on the day you select.</p> <p>Monthly Once a month, on the date you select. If the date doesn't occur in a certain month, you will receive notification of any results on the first day of the following month. For example, if you select 30, you will be notified on March 1, because there is no 30th day in February.</p> |

| | |
|-----------|---|
| Share tab | <p>Enter a user's name...</p> <p>Either type a user's first name or last name, or enter the email address to search for users you want to share this alert with.</p> <p>Added contacts / Shared with</p> <p>The list of users with whom you have shared this alert.</p> |
|-----------|---|

How do I delete an alert?

You can delete an alert you no longer want to run. When you delete an alert, you will no longer receive notifications about it and it will be removed from your list of alerts.

To do this:

1. On the Lexis Advance® Home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:



When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the list of alerts, locate and select the alert you want to delete.
3. Select the **Delete** icon (✕) in the toolbar above the alerts list. The Delete Alerts dialog box appears.
4. Confirm you want to delete the alert by selecting **Delete Alert**.

How do I share a new alert with other users?

You can share new alerts you've created with other users.

To do this:

1. Run your search and review the results.
2. Click the alert icon  at the top of your results. The Alert dialog box appears.
3. Select the options you want from the **Monitor** and **Deliver** tabs.
4. Click the **Share** tab.
5. Enter a user's first or last name or email address to find it in the list and select **Add to Share** to add it to the added contacts list.
6. If you need to remove any users from the Added Contacts list, select the  associated with the contact.
7. Click **Create Alert**.

The users you have shared with will be notified by email, and will find the document in the **Shared by others** group of the left-side pane. You will find the document in the **Shared by me** group.

How do I share an existing alert with other users?

You can share an existing alert with other users.

To do this:

1. Do one of the following:

- On the Lexis Advance® home page, select the **View all alerts** link in the **Alerts** pod.
- Choose **Alerts** from the **More** drop-down list at the top of any page.

The Alerts page appears

2. Locate the alert you want to share and select **Edit**.

3. Click the **Share** tab.

4. Enter a user's first or last name or email address to find it in the list and select **Add to Share** to add it to the added contacts list.

5. If you need to remove any users from the Added Contacts list, select the **X** associated with the contact.

6. Click **Save**.

The users you have shared with will be notified by email, and will find the document in the **Shared by others** group of the left-side pane. You'll find the document in the **Shared by me** group.

How do I update a *Shepard's Alert*®?

Note:


Only *Shepard's Alert*® searches can be updated manually. Search alerts are updated automatically according to the update schedule you set up when you created the alert.

You can update, or run, a *Shepard's Alert*® to check for changes in between dates it is scheduled to run automatically. To update an alert:

1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** pod, or select the **Alerts** link from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Locate the alert you want to update.
3. Select the **Update Now** button () under the title of the alert you want to update.
4. When the **Update Shepard's Alert** box opens, select **Update Now**.

How do I pause an alert?

You can temporarily stop an alert and start it again later. If you pause an alert, you won't receive notifications about it during the period it is paused. Details for paused alerts are shown in grayed-out text in your list of alerts.

To pause an alert:

1. On the Lexis Advance® home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page. The Alerts page appears.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the list of alerts, locate and select the alert you want to pause.
3. Click the **Pause** icon (||) in the toolbar above the alerts list. The Pause Alerts dialog box appears.
4. Confirm you want to temporarily pause the alert by selecting **Pause**.

How do I restart an alert?

You can restart [an alert you have paused](#), to begin receiving notifications about it again. You can also start a new alert you've created using an existing alert.

To do this:

1. On the Lexis Advance® home page, either select **View all alerts** from the **Alerts** pod, or choose **Alerts** from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. Do one of the following:
 - Click the **Start** icon under the title of the alert you want to restart.
 - Select the alert you want to start, and then select the **Start** icon (▶) in the toolbar above the results list.

The Start Alert dialog box appears.

3. Review the information in the dialog box and select **Start**.

How do I find a specific alert?

You can search your saved alerts to find a particular alert, search terms, or other words or phrases.

To search your alerts:

1. Choose **Alerts** from the **More** drop-down list at the top of any page.

Note:

When you first view the alerts list, it is filtered based on which experience you are working in when you view all alerts. For example, if you are working in LexisNexis® Verdict & Settlement Analyzer and you view your alerts, the list is limited to show only Verdict & Settlement Analyzer-related alerts. You can clear this filter and view all of your available alerts (regardless of which experience you are working in) by clicking the X next to the filter name, above the **Narrow By** pane.

2. In the **Search Within Alerts** box at the top left of the page, type the words you want to search for and select **Search**. For example, you can enter the name (or part of the name) of an alert, a term or terms from a previous search, a client ID, and so on. Your results list is filtered to show only those results that contain the term on which you searched.

Note:

To return to the alerts page you were viewing prior to your search, select the **Clear search** link, located near the top of the page.

What is the history feature?

You can quickly resume your work from past research sessions using the Lexis Advance® history feature. Your searches, search terms, documents, deliveries, and other activities are automatically saved in the history for up to 90 days. You can display your research history in a list view or a graphic ("map") view. You can access history by selecting **History** at the top of any page, and then selecting a specific search or other item from the list, or **View all history** or **Research Map**. Or, on the Lexis Advance home page, select the **History** pod, then select a specific item, or select **View all history** or **Research Map** at the bottom.

Note:

For Public Records, you can only find items in history for up to 10 days.

Your last 5 searches are listed on the **History** pod on the home page. Select a search to display the results for it, or select **View all search history** to display your searches from the last 90 days.

To save any of these activities for an unlimited time, create a folder in which to store them.


How do I find an item in my history?

You can search your history to find a previous search or search terms, a document from your results, a page you printed, or any other activity from up to the last 90 days.

Note:

For Public Records, you can only find items in history for up to 10 days.

To do this:

1. Take one of the following actions:
 - On the Lexis Advance® home page, select the **History** pod, then select **Research Map** at the bottom of the pod.
 - From **History** at the top of any page, select **Research Map**.
2. In the **Search Within History** box that appears at the top left of the page, type the words you want to search for. You can enter the name (or part of the name) of a document, a document citation, a term (or terms) from a previous search, a matter ID, and so on.
3. Select the search icon (). The system displays your results.
4. To return to the history page you were viewing before searching your history, select **Clear Search** above your results.

What is a *Shepard's*® citation search?

The *Shepard's*® Citations Service provides a comprehensive report of the cases, statutes, secondary sources, and annotations that cite your authority, including more recent cases that rely on your starting case. You can use this report to quickly validate your research and ensure you have good law.

Shepard's editors assign editorial analysis phrases that best fit the citing case within their editorial guidelines, helping you make a "good law/bad law" determination.

How do I *Shepardize*® a document when I know its citation?

Retrieving a *Shepard's*® report by citation can be done in a variety of ways.

The most common method is to enter "shep:" in the search box, followed by your citation, then press **ENTER** or click the search button.

You could also enter just the citation name in the search box, then click the *Shepard's* Signal™ indicator next to the document name.








The *Shepard's* Signal™ Indicators

The *Shepard's* Signal™ indicators are integrated into case law documents and provide an immediate indication of the subsequent history and treatment of a particular case. When these codes are present, the LexisNexis® research service displays one of the following signals.

Note:

Not every case will have a *Shepard's* Signal indicator.

When a signal is generated from the Subsequent Appellate History, the system looks at the Subsequent Appellate History as a chain of interconnected events. Thus, the phrase generating the signal may be assigned to a decision in that chain that does not apply directly to your case, but may be several links in the chain away from your case.

| Indicator | Description |
|---|--|
|  | Warning: Negative treatment is indicated The red <i>Shepard's</i> Signal indicator indicates that citing references in the <i>Shepard's</i> ® Citations Service contain strong negative history or treatment of your case (for example, overruled by or reversed). |
|  | Warning: Negative treatment is indicated for statute The red exclamation point <i>Shepard's</i> Signal indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain <i>strong negative treatment of the Shepardized™ section</i> (for example, the section may have been found to be unconstitutional or void). |
|  | Questioned: Validity questioned by citing references The orange <i>Shepard's</i> Signal indicator indicates that the citing references in the <i>Shepard's</i> Citations Service contain treatment that questions the continuing validity or precedential value of your case because of intervening circumstances, including judicial or legislative overruling. |
|  | Caution: Possible negative treatment indicated The yellow <i>Shepard's</i> Signal indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that may have a significant negative impact on your case (for example, limited or criticized by). |
|  | Positive treatment indicated The green <i>Shepard's</i> Signal indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that has a positive impact on your case (for example, affirmed or followed by). |
|  | Citing references with analysis available The blue "A" <i>Shepard's</i> Signal indicator indicates that citing references in the <i>Shepard's</i> Citations Service contain treatment of your case that is neither positive nor negative (for example, explained). |
|  | Citation information available The blue "I" <i>Shepard's</i> Signal indicator indicates that citing references are available in the <i>Shepard's</i> Citations Service for your case, but the references do not have history or treatment analysis (for example, the references are law review citations). |

What is Lexis Practice Advisor® ?

Lexis Practice Advisor® is an easy-to-use, intuitive practical guidance product that brings together key information and tools for attorneys who handle transactional matters.

Lexis Practice Advisor

Lexis Practice Advisor provides users with a range of valuable features, including:

- Relevant, practical [forms](#) and [other content](#) built to meet the needs of attorneys who handle transactional matters
- Newly added content for selected practice areas listed in the [Updates in...](#) pane
- A [Recently Browsed Documents](#) pane listing recent content activity
- The **Editors' Picks** pane, containing content our contributing experts recommend
- Access to the latest news and information from all relevant practice areas in the **Law 360 Headlines** pane
- Related topics that appear in the [Topic](#) pane on the left, and a [search](#) box at the top of the page

External Resources

Meet our Authors

The Lexis Practice Advisor *Meet Our Authors* feature allows you to access information about the firms and legal experts who provide our practical guidance and targeted, relevant legal content.

Lexis® Market Tracker

Lexis® Market Tracker searches all the legal documents filed for the purchase of corporations in the United States, so you can find information about recent developments in a particular industry or about a single sale. You can locate digital copies of the original documents for sales, closing contracts, financing, etc., then search those documents for a specific name or phrase.

What is LexisNexis® Litigation Profile Suite?

During the litigation process, you must often identify relevant information about the parties involved in a case, including expert witnesses, judges, and attorneys. Using LexisNexis® Litigation Profile Suite, you can search for a specific person or you can search for specific *details* about the person. (For example, if you are searching for an expert witness, you can search for an area of expertise, which can help you locate potential experts most closely associated with your case subject.) Once you locate the profile for which you are searching, you can view specific details about that person, such as cases in which he or she has been involved, rulings, and so forth. You can use this profile data to help you as you develop a case strategy.

Litigation Profile Suite retrieves profiles from several types of content sources:

- [Expert Witness Profiles](#)
- [Judge Profiles](#)
- [Attorney Profiles](#)

What is LexisNexis® MedMal Navigator®?

LexisNexis® MedMal Navigator® is a customizable dashboard to help you complete medical and legal research. To start populating the dashboard, you'll need to [select a medical topic](#).

Consider these points in using MedMal Navigator®:

- Answer questions in the research assistant to populate the results, then select **Next Question** to submit your answer.
- The Answered Questions pane allows you to review and change answers you've already provided. Select **Previous Answers** and change any answers in the drop-down list, then select **OK** to return to the questionnaire.
- The Upcoming Questions list lets you skip the question offered in the research assistant and choose a new direction for your research. Select the **Upcoming Questions** button, find the question you want to answer, and select **Answer This Question**.
- The **Why is this important?** annotation provides more information about a given question in the research assistant. Some annotations will also include links to documents with more information.

The pod names and their descriptions follow:

| Pod Name | Description | How Does It Work? |
|-------------------------|---|--|
| View all Medical Topics | Over 100 of the most commonly litigated medical malpractice topics appear on the MedMal Navigator® home page. You can use all the MedMal Navigator® tools to research these topics. If you can't find what you're looking for among these topics, you can use the Medical Topics page to search for your topic. This page covers over 800 medical topics. | To access this page, select View All Medical Topics at the top of the home page. The Medical Topics page appears. You can search for a medical topic by using the search box to the left of the page. If you prefer, you can browse the available topics alphabetically. |
| Case Value Assessment | Helps attorneys evaluate the risk of prosecuting or defending a case by comparing the facts of your case to facts from actual verdicts and settlements in our database. At a glance you can see ranges of verdicts in your jurisdiction, and identify which verdicts and settlements most closely match your case. You can select this information for more details and a link out to the case documents. | As you answer questions about your case in the research assistant, an interactive graph will populate with related verdicts and settlements in your jurisdiction. Each verdict or settlement is represented by a circle that fills in as you provide facts that match this case (shown in green), and facts that do not match (shown in orange). Gray areas are facts that you have not yet provided. The graph's X axis organizes results by verdict or settlement amount, with the largest amounts to the right. The graph's Y axis organizes results by how well they match your case, with the best matches at the top. You can select a case by selecting the circle. MedMal highlights the selected circle, and below the chart you will see information about the case. You can see |

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| | | <p>documentation for the case by selecting its name.</p> <p>To navigate back to the dashboard, select the Dashboard option at the top of the page.</p> |
| Standard of Care | <p>The objective of this tool is to help users quickly identify areas where a potential deviation from the standard of care might have occurred so that attorneys can quickly understand the strengths and weaknesses of their case. LexisNexis doctor-editors have scoured the medical guidelines, widely used textbooks, and latest published studies to create an easy-to-follow checklist.</p> | <p>As you answer medical facts about your case, a chart populates on the right side of the page to point out any potential areas where the medical provider may have deviated from the standard of care.</p> <p>A green circle indicates that the fact in your case matches the standard of care, a red circle indicates where the medical provider may have deviated from the standard of care.</p> <p>For more information about a medical fact, select Show Details. This content may include links to medical journal articles or other documents, which will appear if you select them. To collapse the additional details, select Hide Details.</p> |
| Legal Analysis | <p>In the Legal Analysis tool, the questionnaire technology is used to develop a tailored Lexis Advance® search for the legal issue at hand to get you quickly to precisely the documents you need across all Lexis Advance content types.</p> | <p>In the Legal Analysis tool, you must answer several questions before a search result appears.</p> <p>Once you have answered all the questions, the tool returns a count of all the results matching the search generated by your answers. You can choose a different jurisdiction, add more search terms, or view your results.</p> <p>When you view your results, you can:</p> <ul style="list-style-type: none"> ■ List results by category ■ Search within a selected category ■ Apply post filters to a selected category |
| Expert Witness | <p>This tool leverages LexisNexis® Litigation Profile Suite to search for and vet expert witnesses.</p> | <p>MedMal Navigator® automatically searches by specialty and geography. You can change those options using the Narrow By tools on the left side of the page. Arrows at the top of the page allow you to browse your results.</p> <p>Once you have found an expert on whom you would like more information, select the</p> |

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| | | expert's name to see an Expert Witness profile report. |
| Research Parties | This tool leverages public records to investigate people or entities in your case. | <p>To add the name of people or entities related to your case (opposing counsel, plaintiff, hospital, insurance company) to the list, select the Add New Party button at the top of the Research Parties list. Fill out the pop-up form that appears, and select the Add Party button.</p> <p>From the list of names, you can perform a public records search by selecting a name. This will open our public records tool, and you can follow the instructions to see the results.</p> |
| Elsevier's First Consult | The main feature of the Elsevier's First Consult tool is an authoritative medical encyclopedia built by Elsevier Science. This database was written by doctors and nurses for use in hospitals to provide quick, easy-to-understand background on over 800 medical topics. | <p>Based on the topic you have already selected, the Elsevier's First Consult page gives you a list of related topics. If you select a topic, MedMal Navigator® takes you to the article text, with a table of contents in the left navigation bar.</p> <p>If you want to see another related topic, you can select Change Topic to return to the Elsevier's First Consult full topic list.</p> |
| Medical References | This tool allows you to review all the content available in Lexis Advance® for your selected topic. | <p>When you select this tool, a new page appears, displaying a search result set based on your MedMal Navigator® topic. Lexis Advance includes a large and growing database of medical content, including an expansive collection of medical journals published by Elsevier. By default, this page displays Scientific content, but you can use the navigation tools on the left side of the page to see results for other content types.</p> <p>If you select the Illustrations button at the top of the page, a new page will appear with a new result set, based on your MedMal Navigator® topic and filtered to show only images. Our medical illustrations cover anatomy, physiology, and the onset, diagnosis and treatment of most medical conditions.</p> |

What is LexisNexis® Verdict & Settlement Analyzer?

Litigators and general counsel are increasingly involved in evaluating and valuing cases throughout the litigation process. They must understand the likelihood of success and the expected outcome from pursuing litigation as they try to decrease their costs and reduce time spent on the case.

LexisNexis® Verdict & Settlement Analyzer can assist you in assessing and evaluating the level of risk or opportunity associated with a particular case. Specifically, Verdict & Settlement Analyzer examines the outcomes of cases similar to yours and summarizes the results in a series of graphs and charts, which can then be examined more closely for specific verdict information, such as the case topic, specific results, and key players. Having this information early in the case assessment process can help you determine how you want to proceed with a particular case.

Verdict & Settlement Analyzer provides verdicts and settlements from a wide variety of sources. Click [here](#) to view that list.

What is Lexis Advance® Tax?

Using Lexis Advance® Tax, you can simplify your tax research by conducting a single search across multiple resources, which might include cases, codes, regulations, tax analysis, tax commentary, tax news, and other information required to practice tax law.

Lexis Advance Tax lets you, among other things:

- Review expert analysis and insight with related federal code sections and tax topics in Lexis Tax Advisor - Federal Code Reporter.
- Examine practical analysis of state tax codes and regulations drafted by the top tax professionals by using Lexis State Tax Practice Insights.
- Stay on top of the latest tax news by reviewing headlines from Tax Analysts Tax Notes Today or CCH Federal Tax Weekly.
- Review the Matthew Bender® tax treatise collection, which is written by respected authorities in their field and frequently cited by the IRS and tax courts.
- Easily determine whether relevant laws and IRS Administrative rulings are still valid by using available *Shepard's Signal*™ indicators.