LexisNexis® CD

on Folio 4

User's Guide

LexisNexis®

powered by fast Folio®

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Contents

Using this Documentation

The instructional material in this documentation focuses on the tasks made possible by the program features, as reflected in the Table of Contents. To instead locate material based on the features themselves, please refer to the Index.

Instruction Conventions

The bulk of this documentation consists of step-by-step instructions for performing the tasks made possible by the program. Many of these tasks can be initiated in a number of ways; when this is the case, the instructions outline several means of task initiation, always citing the most universally applicable first. Thus, the first cited path to task initiation is generally via either drop-down menu or keyboard shortcut, as these means of task initiation are accessible to broadest population of users including those who employ only the keyboard in order to accommodate some form of physical impairment.

At certain junctures when performing tasks made possible by the program, you made need to choose a single action from among multiple actions. Such junctures are indicated by bulleted items following a given numbered step, each of which is separated by a paragraph consisting solely of the word *OR*.

Example: The following illustrates the method used to indicate mutually exclusive options within instructional material.

1 Access the Advanced Query window or desired query template, as applicable:

- To access the Advanced query window, open the **Search** menu then choose **Advanced Query**.

  OR

- To access a query template, open the **Search** menu then choose the corresponding name from the bottom of the menu.

At other junctures, you may be instructed to choose one or more options from among multiple options. Such junctures are indicated by bulleted items following a given numbered step.

Example: The following illustrates the method used to indicate non-mutually exclusive options within instructional material.

2 In the **Show** area, indicate whether you want to hide or show the following in printed material, inserting a checkmark in the corresponding check box to show the item or clearing a check-mark to hide the item:

- **Query results** (hit highlighting when printing either publication content or the hit list)
- **Inline headings** (full source information for content)
- **Link attributes** (visual enhancement, typically underscoring, used to indicate a link in publication content)
- **Hidden text** (material specific to the production of the active publication)

Finally, because many actionable interface elements such as options and buttons in dialog boxes can be activated in a number of ways — for example, via clicking, pressing the Space Bar, or pressing Enter — non-specific language, such as *activate* or *choose*, as opposed to specific language, such as *click*, is generally used to describe taking action in relation to such elements.

Example: The following illustrates the language used to indicate taking action in relation to interface components that can be activated in a number of ways.

3 In the message indicating that switching between operating modes requires a system reboot and prompting you to confirm your desire to switch modes, choose **Yes**.

Typographical Conventions

The following typographical conventions — designed to help you easily locate key actions within instructions — are used throughout this documentation:

- Boldface is used to highlight areas of the program interface requiring some action on your part, as in "Activate the **Help** button."
- Boldface small caps are used to highlight keystrokes, as in "Press **ENTER**."

Illustrative Material

This documentation includes graphical images designed to highlight certain features of the program. Note that any names or other data appearing in these images are for illustrative purposes only, and any similarity to real persons or other entities is entirely coincidental.

Chapter 1 Introduction

As a legal researcher, your job requires you to track down information on specific legal issues, find related cases, locate analytical material to assist in preparing a brief, or find a specific case or statute. The *LexisNexis® CD* application on the Folio 4 platform transforms your personal computer into an electronic research tool, enabling you to find the information you need quickly and efficiently.

You can use the *LexisNexis CD* application to perform a variety of simple and complex searches, enabling you to quickly locate the information you need. The system provides access to a large collection of documents, as well as direct access to the *lexis.com®* research system (if you are a current subscriber).

Once you find the information you need, you can print or export it for reuse[*] at a later time.

About this Guide

This User's Guide contains all the information you need to use the *LexisNexis CD* application. It assumes that you have already installed the software. If you haven't yet done so, detailed installation instructions can be found in the Quick Installation Guide that was packaged with your software.

Contents

This Guide begins with "A Quick Tour," Chapter 2, which summarizes some key terms and concepts that will help you make efficient use of the *LexisNexis CD* application. The chapter also outlines typical tasks performed using the program, details information related to using the program is accessibility mode, provides instructions on starting and quitting the program, introduces you to the program's main window, and provides basic information on setting preferences.

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* Subject to Terms and Conditions

Chapter 3, “Working with the Table of Contents,” describes the table of contents hierarchy. It also explains how to browse and view publication content from the table of contents as well as how to use the table of contents to limit the amount of content displayed for viewing. Finally, the chapter describes the options for synchronizing the table of contents.

Chapter 4, “Viewing Content,” describes the Document and Reference panes. It also explains how to navigate content, footnotes, and supplements and how to synchronize the Document pane to your location in the table of contents.

Chapter 5, “Understanding Search Mechanisms,” introduces the various search mechanisms offered by the application and outlines how to use these mechanisms.

Chapter 6, “Formulating a Query,” details the various types of queries that can be crafted to find the information you need and provides information on natural language searching.

Chapter 7, “Changing Search Range,” outlines ways of broadening or narrowing the scope of a search from the default of all content in the active publication.

Chapter 8, “Extending Search Functionality,” discusses additional search functionality, including clearing a search, editing a search, viewing search history, re-running a previous search, and searching updated case content on the *lexis.com* service.

Chapter 9, “Viewing Search Results,” describes search-related changes to the main window. It also provides instructions on viewing search results from different levels of detail. Finally, the chapter explains setting your preference with regard to the display of content following a search.

Chapter 10, “Printing and Reusing Content,” explains how to print and export all or part(s) of publication content, including the table of contents and/or hit list.

Chapter 11, “Checking the Current Status of Information,” describes how to access and use that service from the *LexisNexis CD* application.

Chapter 12, "Linking to the lexis.com® Service," describes the *lexis.com* research system and provides instructions on linking directly to that system from the *LexisNexis CD* application.

Chapter 13, "Customizing Publication Content," outlines the process of creating special copies of publication content, called shadow files, which you can then customize by attaching notes, inserting bookmarks, and highlighting information. Also covered is the tagging feature, which allows you to flag content in either read-only or shadow files.

Chapter 14, "Managing Data, Rights, and Peripheral-Software Integration," provides detailed instructions on administering library data storage and permissions along with peripheral software integration to suit your work environment over time.

The User's Guide also includes two appendices containing reference material designed to further hone your use of the program:

Appendix A, "Working with the Program Interface," provides detailed information on the program menus and toolbar and includes instructions for customizing various aspects of the interface, such as pane size, view tab location, and display font.

Appendix B, "Working with Query Templates," describes the query templates most commonly provided with the various publications and outlines common search scenarios for a number of these templates.

If You Need More Information

This documentation assumes that you are familiar with basic Windows® functionality, such as moving and sizing windows, arranging overlapping windows, and navigating within windows. If you have questions about performing such tasks, refer to your Windows documentation. You can also find helpful information by opening the **Start** menu then choosing **Help**.

The *LexisNexis® CD* application also provides an electronic Help file and a tutorial to assist in answering questions you may have while using the application. The tutorial consists of a number of lessons, each addressing a different aspect of the *LexisNexis CD* application. You may view lessons in any order that you choose.

> ***IMPORTANT!*** For the latest information on program functionality — including enhancements made subsequent to any accompanying hard-copy documentation having gone to print — please refer to the *LexisNexis CD* electronic documentation (i.e., Contents or User's Guide, accessible via the Help menu).

To access electronic Help

Press **F1**.

OR

From the **Help** menu choose **Contents**.

OR

Activate the **Help** button, located among the string of command buttons in the upper-right corner of the main window.

> ***Note:*** Certain dialog boxes include Help links, which allow you to open the electronic Help directly to the topic applicable to the given dialog box.

To access the tutorial

1. Open the **Start** menu in one of the following manners:
   - Press the WINDOWS LOGO key.

     OR
   - Press CTRL + ESC.

     OR
   - Click the **Start** button, located on the taskbar in the lower-left corner of your Windows desktop.
2. On the Start menu, choose **Programs**.
3. On the Programs menu, choose **LexisNexis CD on Folio 4**.
4. On the LexisNexis CD on Folio 4 menu, choose **Tutorial**.

   The *LexisNexis CD* tutorial opens.

> ***Note:*** If you want to access the tutorial while working within the program, click the **Help** menu and choose **Tutorial**.

Professional Responsibility

The materials that you are licensing are designed to assist you in your professional practice. It is still your responsibility to review the documents and to research results in order to determine their accuracy and suitability for your purposes. The materials are not intended to be a substitute for the exercise of your professional judgment.

All information provided in this document is general in nature and is provided for educational purposes only. It should not be construed as legal advice. For legal advice applicable to the facts of your particular situation, you should obtain the services of a qualified attorney licensed to practice in your state.

Contacting Technical Support

Technical Support is available 24 hours a day, 7 days a week. When calling for technical assistance, please be at the computer on which the program is running, and please have your account number, found on your packing slip, ready.

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Chapter 2 A Quick Tour

Before using the *LexisNexis® CD* application for the first time, it will be helpful to familiarize yourself with some basic information about the program, including the following:

- Key terms
- Typical tasks
- Starting the program
- Opening a publication
- Using the program in accessibility mode
- Components of the main window
- Setting preferences
- Quitting the program

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Understanding Key Terms

The following terms describe the information hierarchy used by the *LexisNexis CD* application. Terms appear in hierarchy order, from largest unit to smallest:

- ***Library*** — The highest level of organization. A library can encompass multiple products contained on one or more CDs.
- ***Product*** — One or more practice-related publications sold together as a unit.

> ***Note:*** Some publications may be included in more than one product. Therefore, products are not represented in the table of contents hierarchy, and the only time you are likely to see products referenced is when installing the program or initiating rights to additional components of a previously installed library release (see "Managing Library Access Rights," on page 154).

- ***Publication*** — A title generally corresponding to a printed publication.
- ***Infobase*** — Searchable text and graphics, typically of a single publication.

- ***Record***— The smallest searchable, printable, and exportable unit of content, generally corresponding to a heading or to one or more paragraphs of body text following a heading.

Other important terms describe key functions or features of the *LexisNexis CD* application. These terms include the following:

- ***Link*** — An electronic cross-reference that enables you to quickly access the referenced content. Links appear in content as colored, underlined text.
- ***Query*** — A defined term or set of terms used to locate relevant content.
- ***Query template***— A publisher-supplied search mechanism that allows you to easily formulate a query focusing on a specific type of content, such as treatise, case, or code.
- ***Hit*** — An occurrence of a defined query in publication content.

Typical Tasks

Following, in no particular order, are some typical tasks that may be performed using the *LexisNexis CD* application:

- Locate information using the table of contents, much as you would in a printed book
- Formulate and execute a query for specific material or for material related to a given topic
- Navigate and read content
- Print material
- Export content for later use

Starting the Program

Regardless of the Windows® operating system you are using, you start the *LexisNexis CD* application the same way.

To start the *LexisNexis CD* application

1 Open the **Start** menu in one of the following manners:

- Press the WINDOWS LOGO key.

OR

- Press CTRL + ESC.

  OR

- Activate the **Start** button, located on the taskbar in the lower-left corner of your Windows desktop.

> ***Tip:*** If you chose to place a program icon on your desktop during the installation process, you can also initiate program launch by activating the icon then skipping to the bulleted items following step 4, below.

2 On the Start menu choose **Programs**.

3 On the Programs menu choose **LexisNexis CD on Folio 4**.

4 On the LexisNexis CD on Folio 4 menu choose **LexisNexis CD on Folio 4** (or, for network users, either **LexisNexis CD on Folio 4 Client** or **LexisNexis CD on Folio 4 Admin**).

- If you are a new user, a message opens, alerting you that the *LexisNexis CD* program can be run in accessibility mode for users who are visually impaired. Proceed to step 5.

  OR

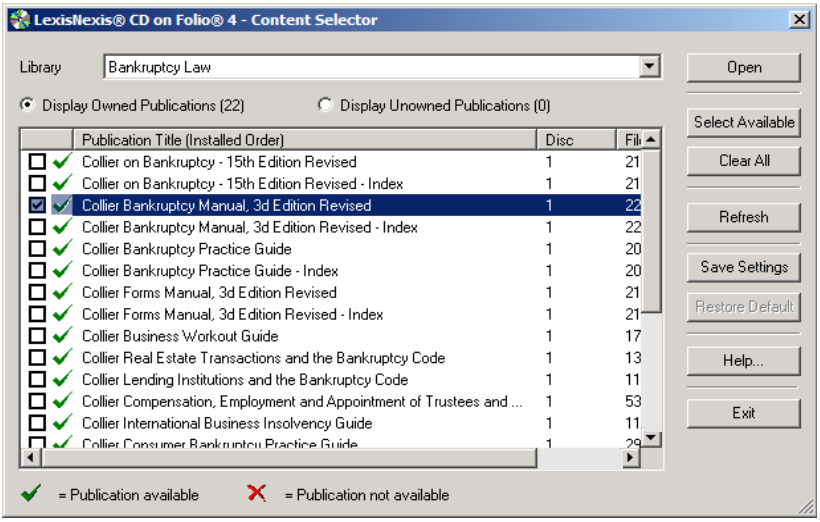
- If you are an existing user, the *LexisNexis CD* application launches to display the Content Selector, from which you may open the desired publication(s) and begin working in the program (see “To open a publication upon first launching the program,” on page 10) without completing the remaining steps of this procedure.

5 Indicate whether you want to run the program in accessibility mode, choosing **Yes** to do so or **No** to instead run the program in standard mode.

> ***Note:*** You can change operating mode at any time, if desired. For related instructions, please see “Using the Program in Accessibility Mode,” on page 13.

The *LexisNexis CD* application launches to display the Content Selector, from which you may open the desired publication(s) and begin working in the program (see “To open a publication upon first launching the program,” on page 10).

Figure 2-1 Content Selector



Opening a Publication

Immediately upon launching the *LexisNexis CD* application, the Content Selector is displayed (see Figure 2-1). From this window, you may open one or more publications and begin working in the application. You can also access the Content Selector and open additional publications from within the application.

▸ To open a publication upon first launching the program

1 From the **Library** drop-down list in the Content Selector (see Figure 2-1), choose the library containing the publication(s) that you want to open.

The chosen library is displayed in the Library field, and the publications in that library are listed in the corresponding area of the Content Selector.

2 Select one or more publications in one of the following manners:

- Activate the check box beside the publication listing.

OR

- Double-click the publication listing.

IMPORTANT! If you are accessing your data via CD and have just one CD-ROM drive, you can open only publications residing on the CD that is currently in the drive. You can avoid this problem by copying your data to a local or network drive via Data Manager (see “Copying a Library from CD,” on page 144).

You can determine whether a publication is available by the icon displayed beside each publication title in the Content Selector:

- A ✓ indicates an available publication.
- A ✗ indicates an unavailable publication.

To update the publication list to reflect current availability after switching CDs, activate the **Refresh** button.

Tip: Content Selector provides several means of helping you find and select publications:

- To sort publication listings in alphabetical order, click the **Publication Title** column header once; to sort publication listings in reverse alphabetical order, click the **Publication Title** column header a second time. To reset the sorting of publication listings to the installed order, click the **Publication Title** column header a third time.
- To select all available publications, activate the **Select Available** button; to clear all selections, activate the **Clear All** button.

To save the current sort order and library and publication selections so that Content Selector reflects these settings each time it is opened, activate the **Save Settings** button; to revert to the installed sort order and selection state, activate the **Restore Default** button.

Note: If you want to see a list of those publications to which you do not currently subscribe, enable the **Display Unowned Publications** option. Note, however, that you will not be able to open and view content for non-licensed publications.

3 Open the selected publication(s) in one of the following manners:

- Press ENTER.

OR

- Activate the **Open** button.

▸ To open a publication from within the program

1. From the main window, open the Content Selector in one of the following manners:

   - Press SHIFT + S.

   OR

   - From the **LexisNexis** menu choose **Content Selector.**

   OR

   - In the main toolbar activate .

2. In the Content Selector (refer to Figure 2-1, on page 10), activate the drop-down arrow beside the **Library** field and choose the library containing the publication(s) that you want to open.

   The chosen library is displayed in the Library field, and the publications in that library are listed in the corresponding area of the Content Selector.

3. Select one or more publications in one of the following manners:

   - Activate the check box beside the publication listing.

   OR

   - Double-click the publication listing.

> ***IMPORTANT!*** If you are accessing your data via CD and have just one CD-ROM drive, you can open only publications residing on the CD that is currently in the drive. You can avoid this problem by copying your data to a local or network drive via Data Manager (see "Copying a Library from CD," on page 144).
>
> You can determine whether a publication is available by the icon displayed beside each publication title in the Content Selector:
>
> - A  indicates an available publication.
> - A  indicates an unavailable publication.
>
> To update the publication list to reflect current availability after switching CDs, activate the **Refresh** button.

Tip: Content Selector provides several means of helping you find and select publications:

- To sort publication listings in alphabetical order, click the **Publication Title** column header once; to sort publication listings in reverse alphabetical order, click the **Publication Title** column header a second time. To reset the sorting of publication listings to the installed order, click the **Publication Title** column header a third time.
- To select all available publications, activate the **Select Available** button; to clear all selections, activate the **Clear All** button.
- To save the current sort order and library and publication selections so that Content Selector reflects these settings each time it is opened, activate the **Save Settings** button; to revert to the installed sort order and selection state, activate the **Restore Default** button.

Note: If you want to see a list of those publications to which you do not currently subscribe, enable the **Display Unowned Publications** option. Note, however, that you will not be able to open and view content for non-licensed publications.

4 Open the selected publication(s) in one of the following manners:

- Press ENTER.

  OR

- Activate the **Open** button.

Using the Program in Accessibility Mode

For those users who are visually impaired, the *LexisNexis CD* application can be run in accessibility mode. Setting the program to run in this mode accommodates screen-reader software usage to the greatest extent possible.

Accessibility mode can be enabled when installing the program as well as at anytime after program installation.

IMPORTANT! Changing between operation modes after the program has been installed requires a program restart and will result in the resetting of program preferences to their default values. If you previously adjusted your program preferences and want to continue using those preferences, you will have to again manually adjust them accordingly.

In accessibility mode, you can navigate and manipulate the program interface and open program menus, from which you can then activate program features, using only the keyboard, as outlined in Table 2-1, on page 14.

Note: You must have a publication open in order to access most program feature (“Opening a Publication,” on page 10).

To enable or disable accessibility mode post program installation

Tip: When accessibility mode is enabled, a checkmark is displayed beside the Accessibility Mode option on the LexisNexis menu.

1 From the **LexisNexis** menu choose **Accessibility Mode.**

The program displays a message indicating that switching between operating modes requires program to close and prompting you to confirm your desire to switch modes.

2 Choose **Yes** in the message.

The message and the program close.

3 Relaunch the program to begin working in the chosen mode.

Table 2-1 Keyboard Navigation Summary for Basic Program Commands

Command	Keyboard Action
Open the File menu.	**ALT + F**
Open the Edit menu.	**ALT + E**
Open the View menu.	**ALT + V**
Open the Navigate menu	**ALT + N**
Open the Search menu.	**ALT + S**

Table 2-1 Keyboard Navigation Summary for Basic Program Commands

Command	Keyboard Action
Open the Layout menu.	**ALT** + **L**
Open the Tools menu.	**ALT** + **T**
Open the Window menu.	**ALT** + **W**
Open the LexisNexis menu.	**ALT** + **X**
Open the Help menu.	**ALT** + **H**
Move the focus from one pane displayed in the main window to the next.	**F8**
Change view (that is, which panes are displayed in the main window).	**F7**
Move the focus between tab rows in dialog boxes.	**UP ARROW** or **DOWN ARROW**
Move the focus between tabs within rows in dialog boxes.	**RIGHT ARROW** or **LEFT ARROW**
Move the focus between options in dialog boxes.	**TAB**
Enable options in dialog boxes.	**SPACEBAR**

Understanding the Main Window

The *LexisNexis CD* main window is the window that appears when you first open a publication. The appearance of the various areas of the window may subsequently change depending on the task you are performing. Figure 2-2 illustrates the window's appearance before a search has been performed; Figure 2-3 illustrates the window's appearance after you have performed a search.

> ***Note:*** These illustrations show the window with all panes displayed. Note that the first time you open the program, only the Document and Reference panes will be displayed. You can quickly and easily change your view at any time by clicking the desired view tab at the top of the main window or pressing the **F7** key until the desired view is displayed. You can also resize panes as desired (see "Resizing Panes," on page 189).

Figure 2-2 The main window before a search

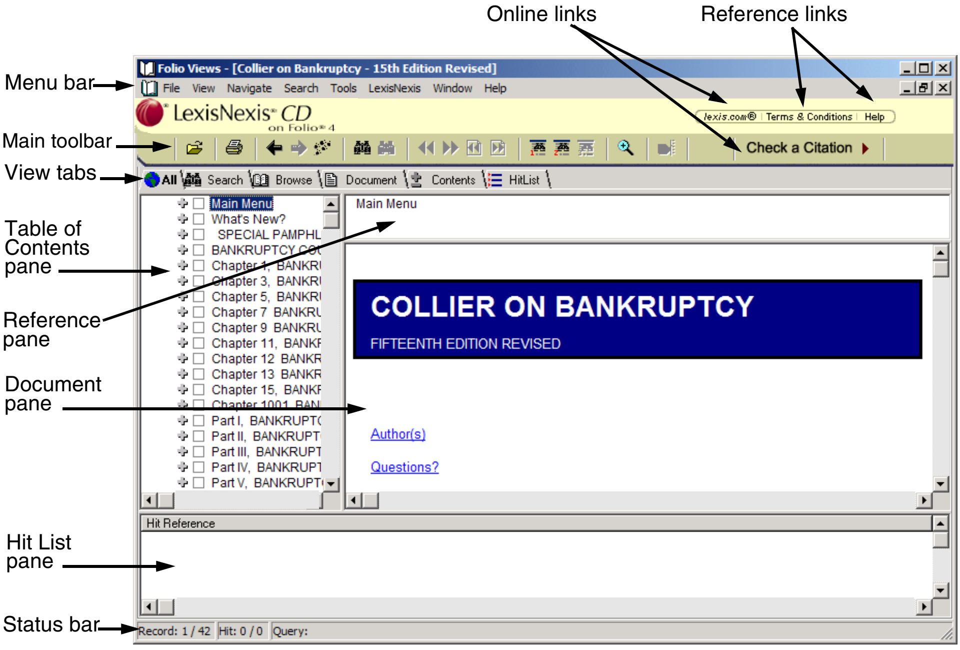


Figure 2-3 The main window after a search

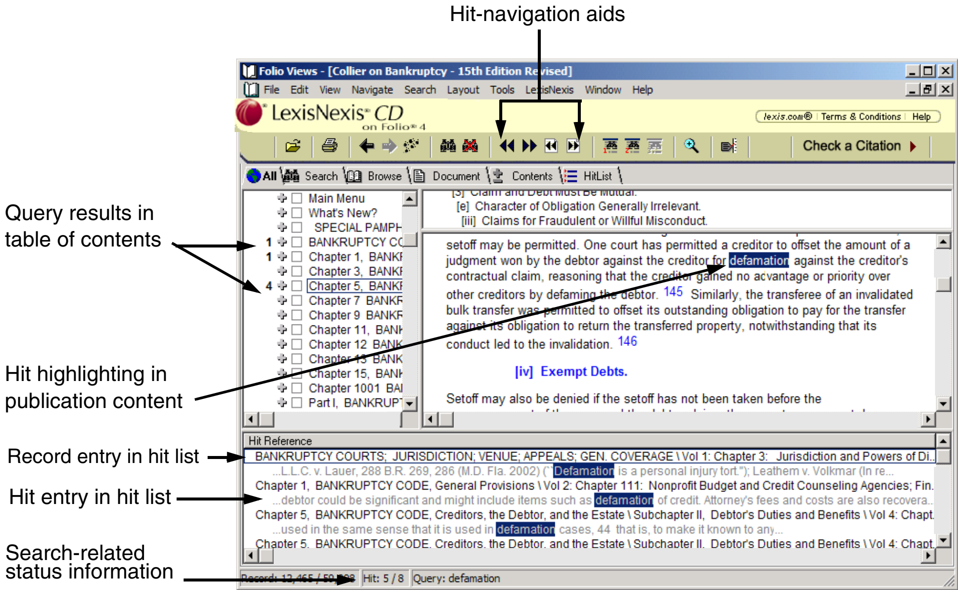


Table 2-2 summarizes the key components and areas of the main window as illustrated in Figure 2-2 and Figure 2-3.

Table 2-2 Summary of main window components

Component	Description
Panes	*The major divisions of the main window, within which are displayed various types of information*

Table 2-2 Summary of main window components *(Continued)*

Component	**Description**
Contents	Displays a hierarchical representation of content for the active publication. You can use the table of contents to: • Peruse publication content (see “Browsing Publication Components,” on page 28). • Display a given portion of publication content for viewing (see “Navigating and Viewing Publication Content,” on page 30). • Limit content displayed for viewing (see “Limiting Content Displayed for Viewing,” on page 31). • Narrow a search (see “Searching Selected Divisions of the Active Publication,” on page 65). • Reflect search-related information (see “Viewing Search Results Using the Table of Contents,” on page 88). • Limit content to be exported (see “To export content of selected divisions in the active publication,” on page 115).
Reference pane	Displays source information (e.g., volume, chapter, and section) for the content currently displayed in the Document pane. (See “Understanding the Document and Reference Panes,” on page 37, for more information.)
Document pane	Displays publication content. (See “Understanding the Document and Reference Panes,” on page 37, for more information.)

Table 2-2 Summary of main window components *(Continued)*

Component	Description
Hit List pane	After a search is run, displays a list of hits grouped by record. (See “Viewing Search Results Using the Hit List,” on page 84, for more information.)
View tabs	***Means of displaying panes in various combinations***
All	Displays all panes; useful for viewing publication content and search results in the broadest possible context.
Search	Displays the Document, Reference, and Hit List panes; useful for viewing search results in a broader context than that afforded by the Hit List only view but without the additional context provided by the table of contents.
Browse	Displays the Document, Reference, and Contents panes; useful for scanning of publication content and/or search results.
Document	Displays the Document and Reference panes; useful for detailed review of publication content.
Contents	Displays only the Contents pane; useful for high-level browsing of publication content and/or search results.
Hit List	Displays only the Hit List pane; useful for high-level browsing of search results.

Table 2-2 Summary of main window components *(Continued)*

Component	Description
Command mechanisms	***Means of initiating various tasks and navigating search results***
Menu bar	A number of menus from which you may access commands to initiate various tasks, including navigating search results. *Note:* Available menus and commands may vary depending on program mode (i.e., the most recent task performed) and interface mode (the active part of the interface). Instructions for executing specific commands are included within the discussion of corresponding tasks. For a more detailed discussion of the menus themselves, refer to "Understanding the Menus," on page 161.
Toolbar	A set of buttons allowing direct access to key program features. *Tip:* Available buttons vary depending on program mode (i.e., the most recent task performed). Instructions for using specific toolbar buttons are included within the discussion of corresponding tasks. For a more detailed discussion of the buttons themselves, refer to "Understanding the Main Toolbar," on page 185. *Note:* The toolbar is not accessible to screen-reader software and is not available via the keyboard.
Online links	***Means of extending certain search functionality to online resources***

Table 2-2 Summary of main window components *(Continued)*

Component	Description
lexis com	Opens a browser window for the *lexis.com* service, where subscribers can make use of online case-finding and analysis tools.
Check a Citation	Provides access to a mechanism for entering citation information and initiating a citation check via the *Shepard's*® Citations Service on the *lexis.com* research system. (See Chapter 11, "Checking the Current Status of Information," for more information.) ***Note:*** You must be a subscriber to the *Shepard's* Citations Service in order to use this feature.
Reference mechanisms	***Means of viewing reference material specific to the program and the active publication***
Terms & Conditions	Opens a file containing the license agreement for the program.
Help	Opens the electronic Help file for the program.

Table 2-2 Summary of main window components *(Continued)*

Component	Description
Status bar	Displays menu option descriptions as well as information related to the active publication: • When the mouse pointer is positioned over a menu option, displays a description of the option. • Before a search, displays the number of the active record (i.e., the record currently displayed in the Document pane) relative to the total number of records in the active publication. • After a search, displays the active query along with the number of the active record containing hits relative to the total number of records containing hits.

Setting Program Preferences

To address varied user preferences, the *LexisNexis CD* application allows for customizing certain aspects of the program.

Some preferences relate primarily to the interface, or how the program "looks." Examples include location of view tabs, font used to display certain content, and menu and toolbar components. Instructions for setting some basic interface-related preferences are provided under "Customizing the Interface," beginning on page 185.

Other preferences relate primarily to functionality, or how the program works. Key functionality-related preferences are outlined in Table 2-3, which also provides information on finding corresponding descriptions and instructions in this guide.

Table 2-3 Summary of Key Functionality-Related Preferences

Preference	Find related description and instructions here
Display in the table of contents the titles of only those searched levels having records with hits	"Viewing Search Results Using the Table of Contents," on page 88
Display in the table of contents the number of records containing hits for each searched level having such documents	"Viewing Search Results Using the Table of Contents," on page 88
Automatically synchronize the table of contents to the location in publication content as currently displayed in the Document pane	"Synchronizing the Table of Contents," on page 32
Automatically synchronize the Document pane to your location in the table of contents	"Synchronizing the Document Pane," on page 41
Limit the amount of content to display in the Document pane after a search	"Limiting Content Displayed After a Search," on page 93

Quitting the Program

When you finish your session, you can quit the *LexisNexis CD* application as follows:

From the **File** menu choose **Exit.**

OR

In the upper-right corner of the *LexisNexis® CD* main window, click the .

Chapter 3 Working with the Table of Contents

Working with the table of contents in the *LexisNexis® CD* application involves the following:

- Displaying the table of contents
- Understanding uses for the table of contents
- Understanding table of contents hierarchy
- Browsing publication components
- Navigating and viewing publication content
- Limiting content displayed for viewing
- Synchronizing the table of contents

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Displaying the Table of Contents

Because the *LexisNexis CD* application allows you to choose at any time between several view settings, the table of contents may not always be displayed. To view the table of contents, you must elect either the Contents, the All, or the Browse view. In Contents view, the table of contents occupies the entire window (see Figure 3-1); in the All or Browse view, the table of contents appears in the Contents pane on the left-hand side of the window, beside the Document and Reference panes (see Figure 3-2).

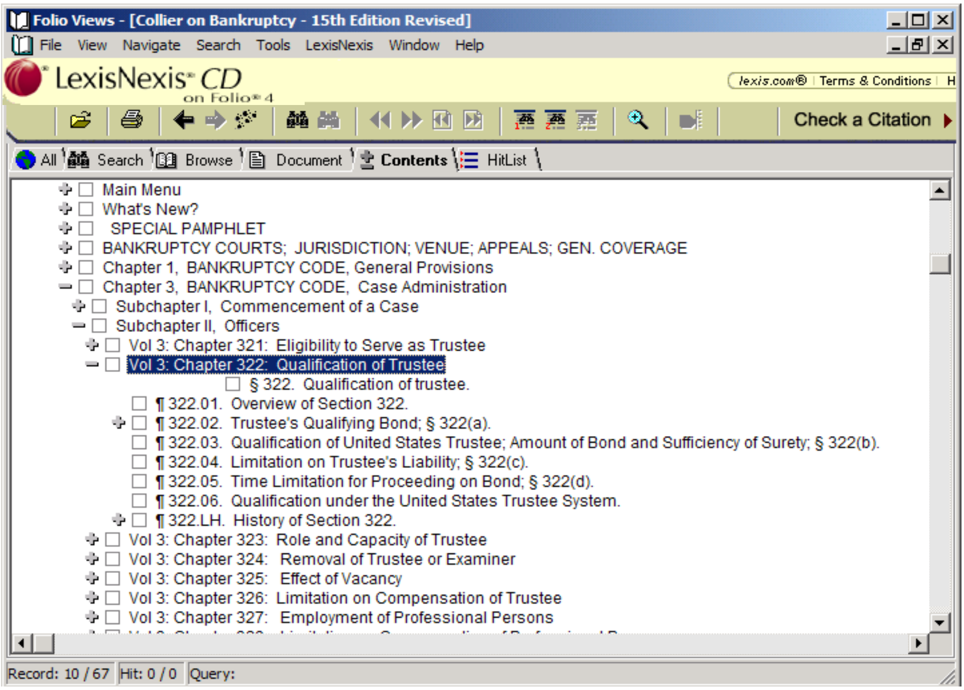
▸ **To display the full-window table of contents**

Press CTRL + SHIFT + C.

OR

Click the **Contents** tab near the top of the main window.

Figure 3-1 Full-window table of contents



▸ To display the partial-window table of contents

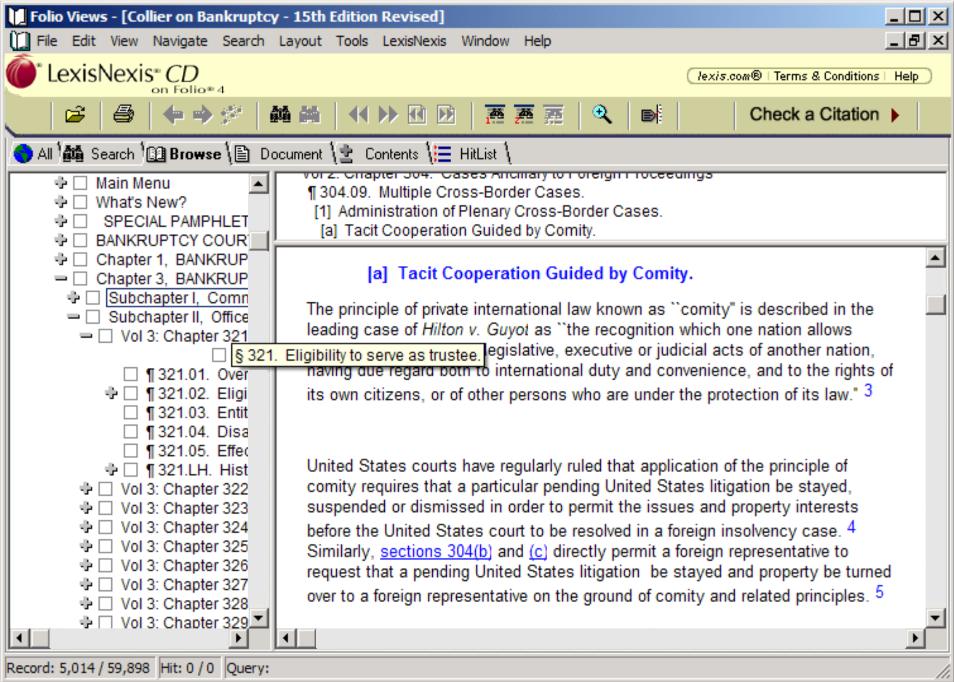
Press F7 until All or Browse view is activated.

OR

Click the **All** or the **Browse** tab near the top of the main window.

The table of contents is displayed in the left-hand pane of the main window.

Figure 3-2 Partial-window table of contents



Understanding Table of Contents Hierarchy

In most printed books, content is divided into a hierarchy, or levels. For example, a book may contain at the highest level multiple volumes. Those volumes may, in turn, contain multiple parts, which, in turn, contain multiple chapters, and so on. Likewise, content in the *LexisNexis CD* application is divided into a hierarchy, and this hierarchy is reflected in the table of contents.

The program uses increasing degrees of indentation to differentiate increasing levels of detail in the table of contents; thus, all entries of a given level (e.g., chapter or court division) will be indented to the same degree, and all sub-entries of a given level beneath those entries (e.g., section or decision year) will be further indented to the same degree. In Figure 3-1, on page 26, and Figure 3-2, on page 27, four levels are shown.

You can expand entries in the table of contents to view an increasing level of detail or collapse entries to facilitate the viewing of higher-level items (see “Browsing Publication Components,” on page 28).

Understanding Uses for the Table of Contents

You can use the table of contents to browse publication components (see related topic on page 28), to navigate and view publication content (see related topic on page 30), to print only certain divisions of publication content (see related topic on page 99), and to limit the publication content displayed for viewing (see related topic on page 31).

When you run a search, you can also use the table of contents to do the following:

- Display the number records with hits, or query matches, for each searched level having such records
- Display the entries of only those searched levels containing records with hits

> ***Note:*** For details on setting table of contents preferences related to displaying search results, see “Viewing Search Results Using the Table of Contents,” on page 88).

- Limit the search to only certain levels of a publication (see “Searching Selected Divisions of the Active Publication,” on page 65)

You can also use the table of contents to help keep track of your location within a publication while you are viewing publication content. By default, the *LexisNexis CD* application is set to automatically synchronize the table of contents to your current location in publication content, highlighting the corresponding entry in the table of contents. (For further details, see “Synchronizing the Table of Contents,” on page 32.)

Browsing Publication Components

To facilitate browsing of publication components, the *LexisNexis CD* application initially shows only the top-level entries. These entries are all collapsed, with the detailed lists of their contents hidden. You can expand entries to view an increasing level of detail or collapse entries to facilitate the viewing of higher-level items.

You can tell whether a particular entry in the table of contents is collapsed or expanded by checking the icon that appears to its left. A indicates that the associated entry is collapsed to hide details, whereas a indicates that the entry is fully expanded, with all details displayed (refer to Figure 3-1, on page 26).

▸ To expand a level in the table of contents to the immediate sublevel

Place the focus on the desired level then from the **View** menu choose **Expand One Level**.

OR

Activate the beside the desired level.

The level expands, revealing all headings at the immediate sublevel.

▸ To fully expand a level in the table of contents

1 Place the focus on the desired level.

2 From the **View** menu choose **Expand Branch**.

The level fully expands, revealing all sublevels.

▸ To collapse a level in the table of contents

Place the focus on the desired level then from the **View** menu choose **Collapse Branch**.

OR

Activate the beside the desired level.

The level collapses, hiding all sublevels.

▸ To fully expand the table of contents

1 Place the focus anywhere within the Contents pane.

2 From the **View** menu choose **Expand All**.

The table of contents fully expands, revealing all levels.

▸ To fully collapse the table of contents

1 Place the focus anywhere within the Contents pane.

2 From the **View** menu choose **Expand to Level**.

The Levels dialog box opens.

3 In the list of levels, choose the item corresponding to the uppermost level in the given publication (e.g., Part).

4 Activate the **OK** button.

The table of contents fully collapses, displaying entries for only the uppermost level.

Navigating and Viewing Publication Content

If you are looking for a particular topic within a publication, you can use the table of contents hierarchy to find it. Once the corresponding entry appears in the Contents pane, you can easily navigate to that portion of the publication and view the corresponding content.

> ***Tip:*** The *LexisNexis CD* application uses bubble Help to display the full text of any entry that extends beyond the right side of the Contents pane. To view the full title of an entry, position your mouse pointer over the portion of the entry that is in view.

To navigate and view publication content from the table of contents

1 Expand or collapse the table of contents hierarchy until the entry for the desired content is displayed.

2 Display the desired content in the Document pane in one of the following manners:

- Place the focus on the corresponding entry, then press CTRL + ENTER.

OR

- Double-click the corresponding entry.

A box appears around the entry in the table of contents, the corresponding content is displayed in the Document pane, and the Reference pane displays the access path (source information as represented in the table of contents hierarchy) for the currently displayed content.

> ***Note:*** See "Understanding the Document and Reference Panes," on page 37, for more information about these elements.

Limiting Content Displayed for Viewing

When you open a publication, the *LexisNexis CD* application by default displays in the Document pane complete content for that publication. At times, however, you may want to limit the amount of content displayed to facilitate viewing of relevant material.

▸ To limit content displayed for viewing

1 Expand or collapse the table of contents hierarchy to display the heading(s) for the desired content.

2 Select the desired content by activating the check box(es) beside the corresponding heading(s) until a checkmark appears in the box(es) (see Figure 3-3).

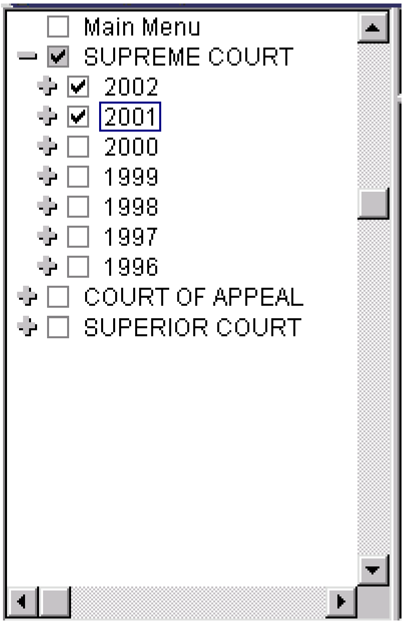
> ***Tip:*** If check boxes are not currently displayed in the table of contents, do one of the following:
>
> - To display check boxes only for the current publication and session, activate the **View** menu then choose **Show Check Boxes**.
> - To display check boxes for all publications and sessions, activate the **Tools** menu then choose **Options**. In the Options dialog box, activate the **Contents** tab activate the check box beside the **Checked Branches** option until a checkmark appears. Finally, activate the **OK** button to close the Options dialog box.

3 Place the focus anywhere in the Document pane, then from the **View** menu choose **Checked Branches.**

The Document pane is updated to display only the content corresponding to your selection(s) in the table of contents.

> ***Tip:*** If you subsequently deselect all content in the table of contents, nothing will be displayed in the Document pane. To again display content, you must either select one or more levels in the table of contents or elect a different display setting (i.e., All Records, Records with Hits, or Tagged Records).

Figure 3-3 Entries selected in the table of contents



Synchronizing the Table of Contents

As a tool for helping you keep track of your location within a publication, the *LexisNexis CD* application is set by default to automatically synchronize the table of contents. As you peruse content in the Document pane, the table of contents is updated to display a box around the entry corresponding to your location in the publication.

> **Note:** If the table of contents is collapsed to the uppermost levels and you are viewing content at a sub-level, the entry for the uppermost level containing that content will be highlighted in the table of contents. If the table of contents is expanded to the sub-level corresponding to the content you are viewing, the entry for that sub-level will be highlighted in the table of contents

If you prefer, you can disable the automatic synchronization feature and instead manually synchronize the table of contents whenever desired.

> **Note:** The *Headings with Hits* option takes precedence over automatic synchronization of the table of contents. Thus, if after running a search, you navigate to a record having no hits, the table of contents will not synchronize to your current location. To re-enable automatic synchronization in such an instance, either disable the *Headings with Hits* option (see "To enable or disable display of only headings with hits in the table of contents," on page 90) or clear the search (see "Clearing a Search," on page 75).

▸ To enable or disable automatic synchronization of the table of contents

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **Contents** tab (see Figure 3-4, on page 34).

3 Enable or disable automatic synchronization of the table of contents as follows:

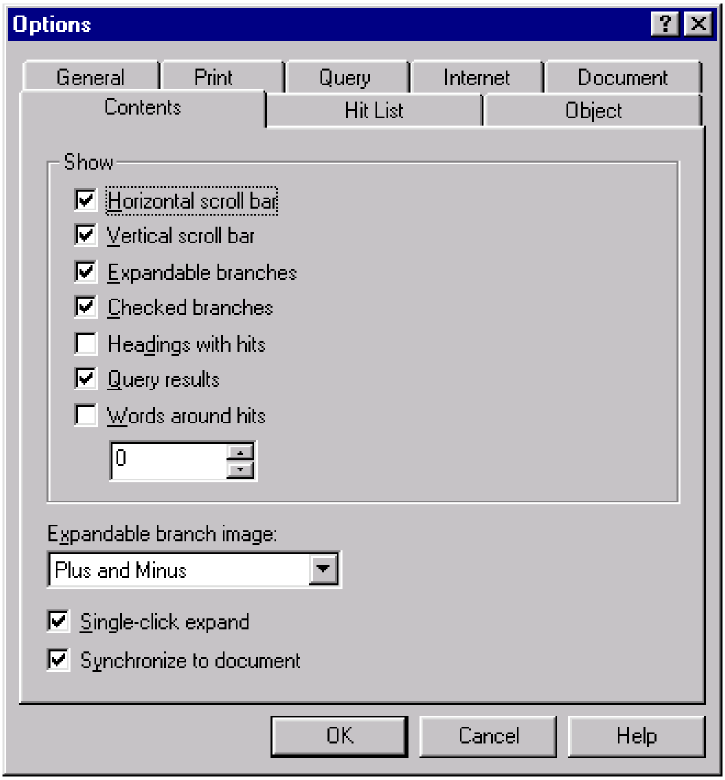
- To enable this option (i.e., have the table of contents automatically synchronize to reflect the location in publication content as currently displayed in the Document pane), activate the check box beside the **Synchronize to Document** option until a checkmark appears in the check box.

OR

- To disable this option, activate the check box beside the **Synchronize to Document** option until the checkmark is cleared from the check box.

4 Activate the **OK** button.

Figure 3-4 Contents tab in the Options dialog box



Tip: Alternatively, choose **Cancel** to exit the Options dialog box without making any changes.

Your preference for automatic synchronization of the table of contents is set, and the Options dialog box closes.

▸ To manually synchronize the table of contents

From the **View** menu choose **Synchronize Contents**.

The table of contents is synchronized to reflect your present location in publication content as displayed in the Document pane.

Note: If the table of contents is collapsed to the uppermost levels and you are viewing content at a sub-level, the entry of the uppermost level containing that content will be highlighted in the table of contents. If the table of contents is expanded to the sub-level corresponding to the content you are viewing, the entry of that sub-level will be highlighted in the table of contents

Chapter 4 Viewing Content

Viewing content in the *LexisNexis® CD* application involves the following:

- Displaying the Document and Reference panes
- Understanding the Document and Reference panes
- Understanding content-navigation aids
- Reading footnotes
- Reading supplements
- Synchronizing the Document pane

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Displaying the Document and Reference Panes

Because the *LexisNexis CD* application allows you to choose at any time between several view settings, the Document and Reference panes may not always be displayed. To view the Document and Reference panes, you must elect either the All, the Search, the Browse, or the Document view.

To display the Document and Reference panes

Press CTRL + SHIFT + D to activate Document view.

OR

Click the **Document**, **All**, **Search**, or **Browse** tab near the top of the main window.

Understanding the Document and Reference Panes

When you open a publication in the *LexisNexis CD* application, the program displays the content in the Document pane. Hierarchical source information for the content (e.g., volume, chapter, and section) is displayed in the Reference pane immediately above the Document pane.

For illustrations of the Document and Reference panes both before and after a search, see Figure 2-2, on page 16, and Figure 2-3, on page 17; Figure 4-1 illustrates the hierarchy of displayed publication content as reflected in the Reference pane.

Note: If complete source information is not visible in the Reference pane and you are running the program in non-accessibility mode, simply resize the pane. To do so, position your mouse pointer over the separator line until the double-headed arrow is displayed. Then, press and hold the primary mouse button, drag the separator line until the pane is the desired size, and release the mouse button. For those users running the program in accessibility mode, note that panes cannot be resized via the keyboard.

Tip: Each component in the Reference pane serves as a direct link to the corresponding element in publication content. Selecting the desired component in the Reference pane then either pressing **ENTER** or double-clicking the component causes the focus in the Document pane to move to the beginning of the corresponding element in publication content.

Figure 4-1 Hierarchy of displayed publication content as reflected in the Reference pane

TITLE 5. EDUCATION
Division 1. State Department of Education
Chapter 1. General Provisions
§ 30. Statement of Policy.

Understanding Content-Navigation Aids

The *LexisNexis CD* application offers a number of navigation aids to help you view content. Some of these navigation aids, such as scroll bars and arrow buttons, are standard in Microsoft® Windows®. Others, such as footnotes and supplement links, are specific to the *LexisNexis CD* application. The available navigation aids are described in the following sections.

Scroll Bars

Use the horizontal and vertical scroll bars to move through publication content, the table of contents, or the hit list. Scroll bars are a standard Microsoft Windows navigation aid.

Arrow Buttons

The arrow buttons appear at each end of the horizontal and vertical scroll bars. Use these buttons to assist you when scrolling through text. Arrow buttons are a standard MicrosoftWindows navigation aid.

Text-Proper Links

Text-proper links let you jump directly from one location to another in the text proper of either the currently displayed publication or another publication. Links typically appear in publication content as underlined, colored text. As you pass the cursor over a link, the pointer changes to a hand.

> ***Note:*** The *LexisNexis CD* application uses two “specialized” links for footnotes and supplements. These links function somewhat differently than regular links. See “Footnote Links,” on page 40, and “Supplement Links,” on page 40, for further information.

To link within or between publications

Activate the link in publication content in one of the following manners:

- Position your cursor at the beginning of the link then press CTRL + ENTER.

  OR

- Click the link.

Your view jumps from the current location to the destination referenced by the link.

> ***IMPORTANT!*** To return to the location from which you linked, either press F6, activate the **Navigate** menu then choose **Go Back**, or click  in the main toolbar.

Table of Contents

You can move from one area in a publication to another via the table of contents. Refer to “Navigating and Viewing Publication Content,” on page 30, for further details.

Footnote Links

Footnotes provide additional information relevant to the document you are viewing. The existence of a footnote is typically denoted in text by a superscript, underlined, colored-number or asterisk link. Footnotes themselves generally appear at the end of the content segment to which they refer.

To jump to a footnote

In the document text, activate the footnote number or asterisk in one of the following manners:

- Position your cursor just before the footnote number or asterisk, then press CTRL + ENTER.

  OR

- Click the footnote number or asterisk.

The footnote text is displayed at the top of the Document pane.

To return from a footnote to its corresponding link location in text

Activate the reference number preceding the footnote text in one of the following manners:

- Position your cursor just before the reference number then press CTRL + ENTER.

  OR

- Click the reference number.

You are returned to the location of the footnote link in publication content.

Supplement Links

When a document has been updated by a supplement, supplement links will appear in the document as colored, underlined text reading either

"[Go to Supp]" or [Current Developments]." Unlike numbered footnotes, supplement text generally does not appear at the end of the corresponding document but instead constitutes a separate document (and is reflected in the table of contents as such).

To view a supplement

Activate the **[Go to Supp]** or **[Current Developments]** link in text or the supplement title in the table of contents, as applicable:

- To activate the **[Go to Supp]** or **[Current Developments]** link in text, either position your cursor at the beginning of the link then press CTRL + ENTER or click the link.

OR

- To activate the supplement title in the table of contents, either select the title then press CTRL + ENTER or click the title.

The text of the supplement appears in the Document pane.

To return from a supplement to its corresponding document

Activate the [Go to Main] link in one of the following manners:

- Position your cursor just before the link then press CTRL + ENTER.

OR

- Click the link.

You are returned to the supplement link location in the text of the corresponding document.

Synchronizing the Document Pane

As a tool for helping you find relevant information quickly, the *LexisNexis CD* application offers the option of automatically synchronizing the Document pane. When this option is enabled and you browse the table of contents, the view in the Document pane scrolls to the location in publication content corresponding to your location in the table of contents.

▸ To enable or disable automatic synchronization of the Document pane

1 From the **Tools** menu choose **Options.**

The Options dialog box opens.

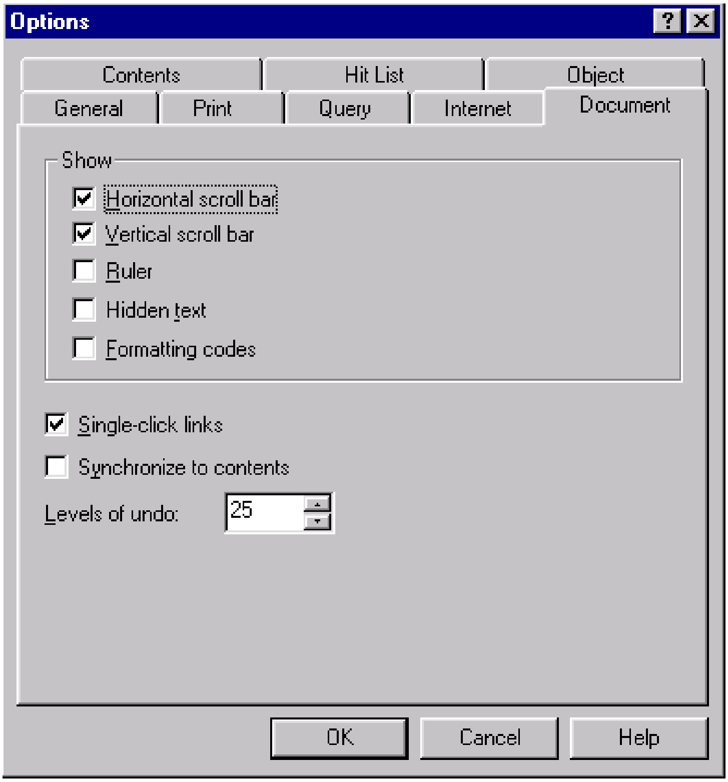
2 Activate the **Document** tab (see Figure 4-2).

3 Enable or disable automatic synchronization of the Document pane as follows:

- To enable this option (i.e., have the Document pane automatically synchronize to reflect you location in the table of contents), activate the check box beside the **Synchronize to contents** option until a checkmark appears in the check box.

OR

Figure 4-2 Document tab in the Options dialog box



- To disable this option, activate the check box beside the **Synchronize to contents** option until the checkmark is cleared from the check box.

4 Activate the **OK** button.

> ***Tip:*** Alternatively, choose **Cancel** to exit the Options dialog box without making any changes.

Your preference for automatic synchronization of the Document pane is set, and the Options dialog box closes.

Chapter 5 Understanding Search Mechanisms

The *LexisNexis® CD* application offers three basic mechanisms for performing searches:

- Advanced Query window
- Query templates
- Query dialog box

These mechanisms are outlined in greater detail in the following sections.

Advanced Query Window

The Advanced Query window (see Figure 5-1) is always accessible by pressing the F2 key; you can also access this search mechanism by choosing Advanced Query from the Search menu or activating  in the main toolbar.

This mechanism allows you to specify various types of queries, alone or in combination. Thus, using the Advanced Query window, you can search for one or more of the following:

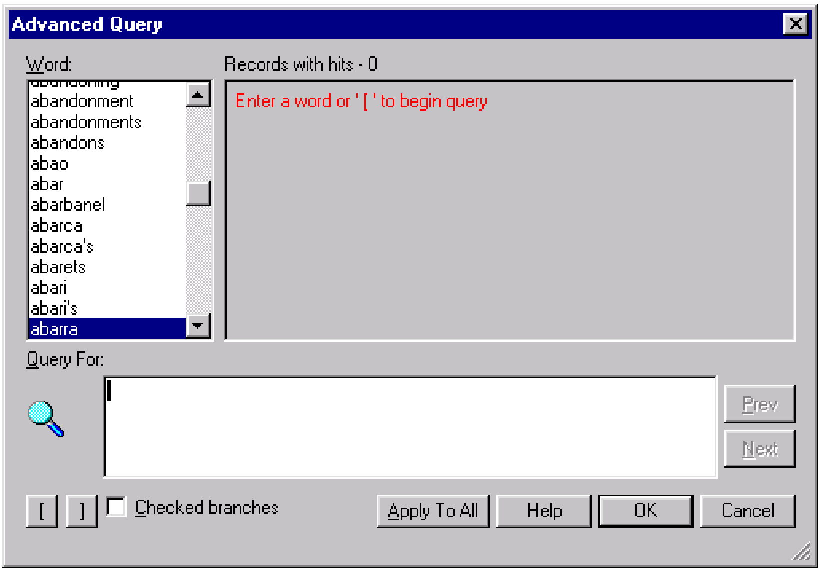
- A specific word
- Variations on a given word
- Words in relationship to other words
- Words as an exact string (i.e., a phrase)
- Multiple words within a given proximity of each other

(See Chapter 6, “Formulating a Query,” for information on crafting search criteria.)

When you run your search, the *LexisNexis CD* application by default searches for your specified query in all content contained either in the active publication or in all open publications, depending on the button that you click to execute the search. Note, however, that the program offers several options for refining the scope of a search (see Chapter 7, “Changing Search Range,” for details).

Once your search is complete, you can edit the query and run a new search, re-run the search against updated case content on the *lexis.com*® service (assuming the searched publication was a case collection), or clear the search. (See Chapter 8, "Extending Search Functionality," for more information.)

Figure 5-1 The Advanced Query window



‣ To run a search using the Advanced Query window

> ***Tip:*** If you are accessing your data via CD and you have a multiple-CD library but only a single CD-ROM drive, you can search only the CD that is currently in the drive. You can avoid this problem by copying your data to a local or network drive via Data Manager (see "Copying a Library from CD," on page 144).

1 Open one or more publications that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** If you are planning to search only one publication, you can elect to limit your search to only selected divisions of that publication. To do so, you must indicate those divisions in the table of contents before opening the Advanced Query window. For further details, see “Searching Selected Divisions of the Active Publication,” on page 65.

2 Open the Advanced Query window (refer to Figure 5-1, on page 46) in one of the following manners:

- Press the **F2** key.

  OR

- From the **Search** menu choose **Advanced Query.**

  OR

- In the main toolbar activate .

3 In the **Query For** field, type your query.

The Word Wheel scrolls to highlight the word most closely matching your input, and the Results Map area of the window displays the number of records containing hits (i.e., occurrences of the specified query in publication content).

> ***Note:*** For additional information, see Chapter 6, “Formulating a Query,” and “Building a Query from Words in the Active Infobase,” on page 60. Note that you can also frame a query so that only certain structural elements within the publication will be searched. See “Searching a Structural Element (Scope) in One or All Open Publications,” on page 67, for further details.

4 Apply your search as appropriate:

- If you are searching only the active publication, activate the **OK** button.

  OR

- If you are searching all open publications, activate the **Apply to All** button.

The Advanced Query window closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See "Viewing Search Results Using the Table of Contents," on page 88, for more information.)

Query Templates

The *LexisNexis CD* application offers a number of query templates, allowing you to craft searches focusing on specific structural elements (e.g., levels, fields, and groups) within given types of content (e.g., analysis, code, and case). In this way, you can easily hone a search without having to know the underlying syntax.

Available query templates vary depending on the publication. (See Appendix B, "Working with Query Templates," for detailed information on some of the most commonly provided query templates.)

The query templates available for a given publication are listed at the bottom of the Search menu, from which they can be directly accessed. You can also open the desired query template for the currently active publication by activating the corresponding  button in the main toolbar. Query templates allow you to specify the following types of queries, either alone or in combination:

- A specific word
- Variations on a given word
- Words in relationship to other words
- Words as an exact string (i.e., a phrase)
- Multiple words within a given proximity of each other

(See Chapter 6, "Formulating a Query," for information on crafting search criteria.)

Once you execute a search using a query template, the program searches for your specified criteria only in those records of the given content type (e.g., treatise). Note that the program also offers several options for further refining the scope of a search (see Chapter 7, "Changing Search Range").

Once your search is complete, you can edit the query and run a new search, re-run the search against updated case content on the *lexis.com*® service (assuming the searched publication was a case collection), or clear the search. (See Chapter 8, “Extending Search Functionality,” or more information.)

To perform a search using a query template

> ***Tip:*** If you are accessing your data via CD or DVD and you have a multiple-disc library but only a single CD-ROM or DVD drive, you can search only the disc that is currently in the drive. You can avoid this problem by copying your data to a local or network drive via Data Manager (see “Copying a Library from CD,” on page 144).

1 Open the publication that you want to search (see “Opening a Publication,” on page 10).

> ***Tip:*** You can elect to limit your search to only selected divisions of the publication. To do so, you must indicate those divisions in the table of contents before opening the query template. For further details, see “Searching Selected Divisions of the Active Publication,” on page 65.

2 Open the desired query template by either activating the **Search** menu and choosing the corresponding name from the bottom of the menu or activating the corresponding  button in the main toolbar. (See Appendix B, “Working with Query Templates,” for illustrations of sample query templates.)

3 In the desired query input field(s), type your query.

The Word Wheel scrolls to highlight the word most closely matching your input, and the Results Map area of the window displays the number of records containing hits (i.e., occurrences of the specified query).

> ***Note:*** For additional information, see Chapter 6, “Formulating a Query,” and “Building a Query from Words in the Active Infobase,” on page 60. Note that you can also frame a query so that only certain structural elements within the publication will be searched. See “Searching a Structural Element (Scope) in One or All Open Publications,” on page 67, for further details.

4 Apply your search by activating the **OK** button.

The query template closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see "Viewing Search Results," beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See "Viewing Search Results Using the Table of Contents," on page 88, for more information.)

Query Dialog Box

The Query dialog box is accessed either by activating the Search menu and choosing Query or pressing the F3 key.

> ***IMPORTANT!*** Unlike the Advanced Query window and the query templates, which use Boolean-logic in executing a search, the Query dialog uses natural language. This has implications with regard to query formulation. For details, see "Understanding Natural Language Searching," on page 61, and "Query Interpretation in Natural Language Searching," on page 62.

This mechanism allows you to specify various types of queries, alone or in combination. Thus, using the Query dialog box, you can search for one or more of the following:

- A specific word
- Variations on a given word
- Words in relationship to other words
- Words as an exact string (i.e., a phrase)

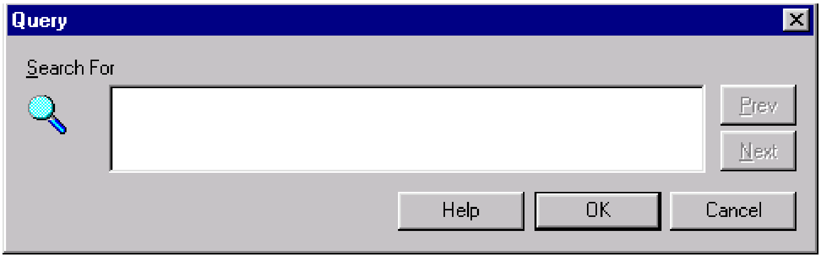
> ***Note:*** The Query dialog box does not allow for ordered or unordered proximity searching.

When you run a search using the Query dialog box, the *LexisNexis CD* application by default searches for your specified query in all content contained in the active publication. Note, however, that you may narrow a search to selected divisions of the publication by indicating those divisions in the table of contents. (For further details, see "Searching Selected Divisions of the Active Publication," on page 65).

Once your search is complete, you can edit the query and run a new search, re-run the search against updated case content on the *lexis.com*® service (assuming the searched publication was a case collection), or clear the search. (See Chapter 8, "Extending Search Functionality," for more information.)

> ***IMPORTANT!*** The search results obtained when using the Query dialog box will differ from those obtained when using the other search mechanisms (i.e., the Advanced Query window and the query templates). For details, see "Search Results Compilation in Natural Language Searching," on page 63.

Figure 5-2 The Query dialog box



▸ To run a search using the Query dialog box

> ***Tip:*** If you are accessing your data via CD or DVD and you have a multiple-disc library but only a single CD-ROM or DVD drive, you can search only the disc that is currently in the drive. You can avoid this problem by copying your data to a local or network drive via Data Manager (see "Copying a Library from CD," on page 144).

1 Open the publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected divisions of the publication. To do so, you must indicate those divisions in the table of contents before opening the Query dialog box. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the Query dialog box (see Figure 5-2) in one of the following manners:

- Press the **F3** key.

  OR

- From the **Search** menu choose **Query.**

3 In the **Query For** field, type your query.

> ***Note:*** For general information, see "Formulating a Query," beginning on page 53,; for information specific to formulating a query for use with the Query dialog box, see "Query Interpretation in Natural Language Searching," on page 62.

4 Apply your search by activating the **OK** button.

The Query dialog box closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see "Viewing Search Results," beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See "Viewing Search Results Using the Table of Contents," on page 88, for more information.)

Chapter 6 Formulating a Query

The *LexisNexis® CD* application enables you to formulate queries of various forms. Specifically, you can craft a query for any of the following, alone or in combination:

- A specific word
- Variations of a word (using wildcards)
- Words in relationship to other words (using connectors)
- Words as an exact string (i.e., a phrase)
- Multiple words within a given proximity of each other

> ***Note:*** Regardless of the type of query, you can craft it in such a way so as to apply the query to only certain structural elements within a publication, (assuming you are using either the Advanced Query window or a query template to run your search). For details, see "To search a structural element within one or all open publications," on page 68.

> ***Tip:*** Assuming you are using either the Advanced Query window or a query template to craft your query, the *LexisNexis CD* application provides ready access to a list of words in the active infobase, allowing you to maximize the efficiency of your query. (For details, see "Building a Query from Words in the Active Infobase," on page 60.)

> ***IMPORTANT!*** When you use the Query dialog box, the program uses natural language in executing your search. This has implications with regard to interpreting a query and compiling search results. For details, see "Understanding Natural Language Searching," on page 61.

Searching for a Specific Word

The simplest form of query is a single word. When you enter a single word as the criterion for a search, the *LexisNexis CD* application looks for that exact word in publication content.

> ***Tip:*** You can search for a specific word using any of the search mechanisms. Note, however, that when you use the Query dialog box to perform a search, the *LexisNexis CD* application will automatically look for records containing the exact word that you specified as well as variations on that word (see "Query Interpretation in Natural Language Searching," on page 62, for more information).

Searching for Variations of a Word

In certain situations, you may want to search for discussions of a given topic, but you may not know the exact word form used to refer to that topic in the content that you are searching. For example, a discussion on the topic of *notifications*, may reference the variant forms *notification*, *notify*, *notifies*, or *notified* ***without*** referencing *notifications*.

To address such situations, the *LexisNexis CD* application supports searching for word variations via the use of wildcard characters.

The program supports two wildcard characters: the question mark (?) and the asterisk (*). Table 6-1 describes each wildcard character and provides examples and corresponding results of searches using each.

> ***Tip:*** All search mechanisms support the use of wildcards. Note that when you use the Query dialog box, however, the *LexisNexis CD* application will automatically look for records containing the exact word that you specify as well as certain variations on that word (see "Query Interpretation in Natural Language Searching," on page 62, for more information).
>
> Note also that you can use wildcards as part of a phrase search to slightly broaden the search [see "Searching for an Exact Word String (Phrase)," on page 58].

Table 6-1 Wildcard Summary

Wildcard	Symbol	Example/Result
Single character wildcard	?	***Example:*** sm?th ***Result:*** This search finds *smith* and *smyth*, and any other variation where the third letter differs.

Table 6-1 Wildcard Summary *(Continued)*

Wildcard	Symbol	Example/Result
Multiple character wildcard	*	***Example:*** rectif* ***Result:*** This search finds *rectify, rectifying, rectifies, rectifier,* and other variations.

Searching for Words in Relationship

At times, you may want to craft a search to find discussions that reflect certain relationships among topics. For example, you may want to find material referencing both *bankruptcy* and *liquidation*. Or you may want to broaden a search to find discussions referencing *bankruptcy* or *liquidation* or both.

The *LexisNexis CD* application offers you great flexibility in defining relationships among multiple words entered as search criteria. Specifically, by inserting Boolean-based connectors between words, you can craft a search for any of the following:

- Two or more words (e.g., *bankruptcy* and *liquidation*)
- One word or another word or both words (e.g., *bankruptcy* or *liquidation* or both)
- One word or another word but not both words (e.g., *bankruptcy* or *liquidation* but not both)
- One word but not another word (e.g., *bankruptcy* not *liquidation*)
- Any combination of the above

Table 6-2 describes the Boolean-based connectors supported by the *LexisNexis CD* application and provides examples and corresponding results of searches using each. Note that when using a connector, you can type either the word, for example, *and*, or the corresponding symbol, for example, *&*.

> ***Note:*** As implied in Table 6-2, if you enter as search criteria multiple words each separated by a space, the program will by default infer the *and* connector (i.e., return as search results only those records containing all entered words).

> ***Tip:*** You can use the connectors outlined in Table 6-2 with the Advanced Query window as well as with all query templates. The Query dialog box, however, performs a natural language search, which requires the use of different connectors when searching for words in relationship. For further details, see "Query Interpretation in Natural Language Searching," on page 62.

Table 6-2 Boolean-Based Connector Summary

Connector	Symbol	Example/Result
AND	& space	***Examples:*** husband and wife husband & wife husband wife ***Result:*** This search finds only those records containing both the word *husband* and the word *wife*.
OR	|	***Examples:*** child or offspring child | offspring ***Result:*** This search finds those records containing the word *child* or the word *offspring* or both words.
XOR	~	***Examples:*** anti-trust xor treble anti-trust ~ treble ***Result:*** This search finds those records containing the word *anti-trust* or the word *treble* but not both words.

Table 6-2 Boolean-Based Connector Summary *(Continued)*

Connector	Symbol	Example/Result
NOT	^	***Examples:*** immigrant not alien immigrant ^ alien ***Result:*** This search finds only those records containing the word *immigrant* without containing the word *alien*.

Overriding Default Connector Application

When you craft a query consisting of multiple words and connectors, the *LexisNexis CD* application by default applies each connector only to the word immediately following (in the case of the **not** connector) or the words immediately adjacent (in the case of the **and**, **or**, and **xor** connectors) and processes connectors in the following order:

1. Not
2. Or
3. Xor
4. And

As an example, consider the following query:

attorney **and** *client* **not** *doctor* **and** *patient*

In response to this query, the program would first process the **not** connector, applying the connector to and eliminating as search results any record containing the word *doctor*. Next, the program would process the **and** connector, applying the connector to and including among the search results any record containing the words *attorney*, *client*, ***and*** *patient*. Thus, for this query, the program would return as search results those records containing the words *attorney*, *client*, ***and*** *patient* without containing the word *doctor*.

You may, however, want to instead find those records containing the words *attorney* and *client* but not the words *doctor* and *patient*. You can do so through the use of parentheses in the query, as follows:

attorney **and** *client* **not** *(doctor* **and** *patient)*

In this way, you override the default connector application, instructing the program to apply the **not** connector to the word *patient* as well as to the word *doctor*. For this query, then, the program will eliminate from the search results any record containing both words.

Searching for an Exact Word String (Phrase)

A phrase is an ordered collection of words that the *LexisNexis CD* application interprets as a single unit. You would use a phrase as your search criteria when you want to find an exact match to a specific set of words in a specific order.

To craft a search in the form of a phrase, enclose the entered words in quotation marks (for example, “consumer bankruptcy” or “board of education”).

> ***IMPORTANT!*** Note that unless you are using the Query dialog box (which automatically searches for variations on word form in all types of queries), this type of query is restrictive in nature in that you may not find relevant material if the wording of the material varies even ***slightly*** from the entered query. However, you may use wildcards in phrase searches to slightly broaden the search. For example, a query of “consumer debt*” would return as search results all records containing the phrase “consumer debt”; “consumer debts”; “consumer debtor”; etc. (For further details on using wildcards, see “Searching for Variations of a Word,” on page 54.)

> ***Tip:*** Phrase searches are supported by all search mechanisms. Note, however, that the Query dialog box will automatically search for variations of each word entered as part of a phrase. See “Query Interpretation in Natural Language Searching,” on page 62, for more information.

Searching for Multiple Words within a Given Proximity of Each Other

At times, you may want to home in on content containing specified words within a given distance of each other. For this reason, the *LexisNexis CD* application supports both ordered and unordered proximity searches.

Ordered Proximity Searches

An ordered proximity search allows you to find records containing words that appear within a specified distance of each other and that appear in the order in which they are entered as search criteria. The syntax for an ordered proximity search is as follows:

"{whatever words you want to find}"/{within this number of words}

Thus, if you wanted to find material containing the words *debtor* and *interest* in that order and within 10 words of each other, you would enter the following as your query:

"debtor interest"/10

This query would return as search results only those records containing both words in the order entered and within 10 words of each other. If either word or both words do not appear, if both words do appear but do so farther apart than 10 words, or if both words do appear but in opposite order (i.e., *interest* then *debtor*), the record will not be returned as a search result.

> ***Tip:*** You can perform ordered proximity searches using the Advanced Query window or any query template. The Query dialog box, however does ***not*** allow for ordered proximity searches.

Unordered Proximity Searches

An unordered proximity search allows you to find documents containing words that appear within a specified distance of each other regardless of the order in which they appear. The syntax for an unordered proximity search is as follows:

"{whatever words you want to find}"@{within this number of words}

Thus, if you wanted to find material containing the words *debtor* and *interest* within 10 words of each in any order, you would enter the following as your query:

"debtor interest"@10

This query would return as search results only those records containing both words within 10 words of each other. If either word or both words do not appear or if both words do appear but do so farther apart than 10 words, the record will not be returned as a search result.

> ***Tip:*** You can perform unordered proximity searches using the Advanced Query window or any query template. The Query dialog box, however does ***not*** allow for unordered proximity searches.

Building a Query from Words in the Active Infobase

Assuming you are using either the Advanced Query window or a query template to craft your query, the *LexisNexis CD* application provides ready access to a list of all words in the active infobase. This feature, known as the Word Wheel, allows you to hone a query to maximize the efficiency of the related search.

As you type a word in the query input field, the Word Wheel scrolls to the word that most closely matches your input. You can also scroll through the Word Wheel until you find a word that you want to include in your query.

▸ To build a query using words from the active infobase

1 Open the desired publication. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected divisions of the publication. To do so, you must indicate those divisions in the table of contents before opening the desired search mechanism. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the Advanced Query window or the desired query template, as applicable:

- ***To open the Advanced Query window***, either press the **F2** key; activate the **Search** menu then choose **Advanced Query**; or click  in the main toolbar.

OR

- ***To open a query template***, either activate the **Search** menu then choose the corresponding name from the bottom of the menu or activating the corresponding  button in the main toolbar.

3 In the Word Wheel (refer to Figure 5-1, on page 46), use the arrows or scroll bar to move the view upward or downward until you find a word for which you want to search.

> ***Tip:*** You can also begin typing your query in the applicable query input field. When you do so, the Word Wheel scrolls to highlight the word most closely matching your input.

4 Insert the word from the Word Wheel into your query by in one of the following manners:

- Put the focus on the word in the Word Wheel, then press CTRL + ENTER.

  OR

- Double-click the word in the Word Wheel.

> ***Note:*** If you insert multiple words from the Word Wheel into a query, the program will assume the ***or*** connector between the words. (For further information on Boolean-based connectors, see "Searching for Words in Relationship," on page 55, and "Overriding Default Connector Application," on page 57.)

5 Apply your search by activating the **OK** button.

The given search mechanism closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see "Viewing Search Results," beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See "Viewing Search Results Using the Table of Contents," on page 88, for more information.)

Understanding Natural Language Searching

When you run a search in the *LexisNexis CD* application using either the Advanced Query window or a query template, the program uses standard Boolean-based logic in interpreting your query and does not otherwise filter search results. So, for example, if you were to enter a query of *husband and wife* the program would do as follows:

- Interpret the word *and* as an operator indicating the relationship between the terms *husband* and *wife* and therefore look for records containing both the word *husband* and the word *wife* but otherwise ignore the word *and*
- Return as search results all records containing both the word *husband* and the word *wife* in the order in which those records appear in publication content

To address varying user needs, however, the program also allows for natural language searching via the Query dialog box. This type of search differs from the Boolean-based search described above in relation to both query interpretation and search results compilation.

Query Interpretation in Natural Language Searching

Natural language searching has the following implications with regard to query interpretation:

- Whether your query consists of one or more words or a phrase, the program automatically looks for records containing the exact word form that you specify as well as variations on that word form. For example, if you enter *legislate*, the program looks for the word *legislate* as well as the words *legislates*, *legislated*, and *legislating*.

> ***Note:*** You can extend this default functionality through the use of wildcards (see "Searching for Variations of a Word," on page 54).

- If you enter a Boolean-based connector (e.g., *and*) as part of your query, the program will interpret the connector as a query term, that is, will look for the connector along with the other entered terms. If you want to search for words in relationship, you must instead use natural language connectors, as outlined in Table 6-3.

> ***Note:*** As indicated in Table 6-3, if you enter as search criteria multiple words each separated by a space, the program will by default infer the *or* connector (i.e., return as search results records containing one, multiple, or all entered words).

Table 6-3 Natural-Language Connector Summary

Symbol	Implied Connector	Example/Result
+ (plus sign)	and	***Example:*** husband + wife ***Result:*** This query finds only those records containing both the word *husband* and the word *wife*.
Space	or	***Example:*** child offspring ***Result:*** This search finds all records containing the word *child*, or the word *offspring*, or both words.
- (minus sign)	not	***Example:*** immigrant – alien ***Result:*** This search finds only those records containing the word *immigrant* without also containing the word *alien*.

Search Results Compilation in Natural Language Searching

When you run a natural language search using the Query dialog box, the program returns as search results only up to 50 records containing hits. Furthermore, those records are ranked according to relevancy. Thus, entries in the hit list may not reflect the order of their occurrence in publication content.

In determining relevancy of a record containing hits, the program considers ***all*** of the following:

- The number of times the queried-for item(s) appear in the record, such that a record containing the queried-for item(s) 5 times will be considered more relevant than a record containing the queried-for item(s) 2 times.

- The number of times each item in a multiple-item query appears in overall publication content, such that a record containing even 1 occurrence of a less commonly found item will be considered more relevant than a record containing multiple occurrences of a more commonly found item.
- The number of times the queried-for item(s) appear in the record relative to the length of the record, such that if two records contain the same number of occurrences of the queried-for item(s), the shorter record will be considered more relevant.
- The number of queried-for items appearing in the record, such that a record containing 3 of 4 queried-for items will be considered more relevant than one containing only 2 of 4.

Chapter 7 Changing Search Range

When you run a query, the *LexisNexis® CD* application by default searches the active publication. If you are using the Query dialog box or the Advanced Query window, the program searches the entire active publication; if you are using a query template, the program searches only that content of the type specified by the template itself (e.g., treatise material).

The *LexisNexis CD* application does, however, provide for flexibility in defining search range. Specifically, you can instruct the program to search any of the following:

- Selected divisions of the active publication
- The entire contents of all open publications
- One of several defined structural elements (i.e., "scopes") within one or all open publications
- The entire contents of all publications in a given directory on your computer

Searching Selected Divisions of the Active Publication

One way of refining search range is to limit the search to only certain divisions of the active publication. To do so, you must first select the desired division(s) via the table of contents.

> ***Note:*** You can change search breadth in this manner using any of the search mechanisms (i.e., Advanced Query window, query templates, or Query dialog box).

To search selected portions of the active publication

1. Open the desired publication. (For instructions on opening a publication, see "Opening a Publication," on page 10.)
2. In the Contents pane, expand the hierarchy until the publication divisions that you want to search are displayed.

> ***Note:*** For more detailed information on working with the table of contents hierarchy, see "Understanding Table of Contents Hierarchy," on page 27, and "Browsing Publication Components," on page 28.

3 Select the desired division(s) by activating the check box(es) beside the corresponding heading(s) until a checkmark appears in the box(es).

> ***Note:*** You must select the desired divisions before executing your search. Note that if you activate the check box of a division having one or more subdivisions, the subdivisions will automatically be selected, as indicated by the checkmark(s) inserted in the corresponding check box(es).

> ***Tip:*** If check boxes are not currently displayed in the table of contents, do one of the following:
>
> - To display check boxes only for the current publication and session, activate the **View** menu then choose **Show Check Boxes**.
> - To display check boxes for all publications and sessions, activate the **Tools** menu then choose **Options**. In the Options dialog box, activate the **Contents** tab, then activate the check box beside the **Checked Branches** option until a checkmark appears. Finally, activate the **OK** button to close the Options dialog box.

4 Open the desired search mechanism:

- ***To open the Query dialog box***, either press the **F3** key or activate the **Search** menu then choose **Query**.

  OR

- ***To open the Advanced Query window***, either press the **F2** key; activate the **Search** menu then choose **Advanced Query**; or click  in the main toolbar.

  OR

- ***To open a query template***, either activate the **Search** menu then choose the corresponding name from the bottom of the menu or activating the corresponding  button in the main toolbar.

5 In the applicable query input field, type your query.

> ***Note:*** See Chapter 6, “Formulating a Query,” for additional information. If you are using the Query dialog box, also refer to “Query Interpretation in Natural Language Searching,” on page 62. If you are using the Advanced Query window or a query template, you may also want to consult “Building a Query from Words in the Active Infobase,” on page 60, and/or “Searching a Structural Element (Scope) in One or All Open Publications,” on page 67.

6 Apply your search by activating the **OK** button.

The given search mechanism closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See “Viewing Search Results Using the Table of Contents,” on page 88, for more information.)

Searching a Structural Element (Scope) in One or All Open Publications

Another way of changing search range is to limit a search to a predefined structural element, or scope, within one or all open publications. While structural elements vary from publication to publication, some examples are as follows:

- Level — one of the hierarchical divisions within a publication, such as a section or chapter
- Group — related records within a publication, such as forms within a publication containing non-form–related material as well
- Field — region representing a constituent part within the corresponding overall content, such as the date field within a case

- Highlighter — a user-created and -named visual enhancement for calling attention to content in a shadow file (see “Highlighting Content in Shadow Files,” on page 137)
- Note — a user-created annotation posted to a shadow file (see “Annotating Content in Shadow Files,” on page 132)

> ***Note:*** For information on shadow files, see Chapter 13, “Customizing Publication Content,” beginning on page 127, and, specifically, “Creating and Opening Shadow Files,” on page 129.

Note that some of these elements — including pop-ups, highlighters, and notes — are not searched when executing a typical query using either the Advanced Query window or a query template. Thus, only by changing search breadth in this manner can you search these elements.

> ***IMPORTANT!*** While it is possible to apply this type of search to all open publications, note that structural elements may vary from publication to publication; thus, in order to ensure the effectiveness of such a search, you may first want to verify that all open publications have the designated element and, if applicable, sub-element.

> ***Note:*** You can change search breadth in this manner using either the Advanced Query window or a query template as the search mechanism. Note, however, that query templates by design focus on certain structural elements, allowing you to perform a scope search without having to know the underlying search syntax.

To search a structural element within one or all open publications

1. Open the publication(s) in which you want to search the structural element. (For instructions on opening a publication, see “Opening a Publication,” on page 10.)

   > ***Note:*** If you are planning to search highlighters or notes, be sure to open the shadow file(s) corresponding to the publication(s). See Chapter 13, “Customizing Publication Content,” for further information on shadow files.

> ***Tip:*** If you are planning to search only one publication, note that you can further refine search range by selecting to search the structural element in only certain divisions of that publication. To do so, you must first select the desired division(s) as outlined in steps 2 and 3 under "To search selected portions of the active publication," beginning on page 65. Then complete the remaining steps of this procedure.

2 Open the Advanced Query window or the desired query template, as applicable:

- ***To open the Advanced Query window***, either press the **F2** key; activate the **Search** menu then choose **Advanced Query**; or click  in the main toolbar.

OR

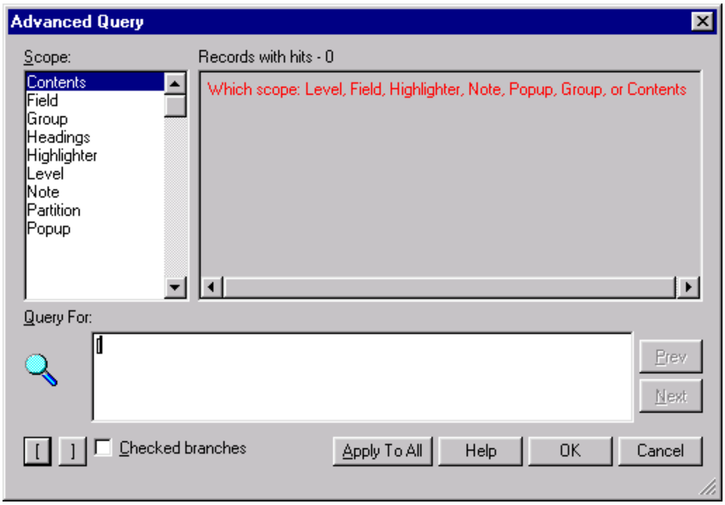
- ***To open a query template***, either activate the **Search** menu then choose the corresponding name from the bottom of the menu or activating the corresponding  button in the main toolbar.

3 In the query input field, type an open square bracket (**[**).

The Word Wheel list changes to display a list of the structural elements in the active publication (see Figure 7-1).

> ***Tip:*** If you are using the Advanced Query window and plan to search all open publications, you may want to verify that the chosen element (and, if applicable, sub-element) is present in all those publications before proceeding. To do so, activate another publication by clicking the corresponding window, then repeat step 3, above, to display the list of structural elements in that publication. Repeat this process for all open publications.

Figure 7-1 Word Wheel displaying list of scopes



4 In the Word Wheel, double-click the name of the desired structural element.

The chosen element name is inserted following the open bracket in the query input field.

> ***Note:*** Certain elements — including level, field, highlighter, and group — have sub-elements from which you must choose in order to completely define the scope of your search. In such a case, once you choose the element, the Word Wheel will again change to display a list of corresponding sub-elements. Simply double-click the name of the desired sub-element to insert it following the element name in the Query For field.

5 Following the element or sub-element name in the query input field, type a close bracket (**]**).

6 Following the close bracket in the query input field, type your query.

The Word Wheel scrolls to highlight the word most closely matching your input, and the Results map area of the window displays the number of records containing hits (i.e., occurrences of the specified query).

> ***Note:*** For additional information, see Chapter 6, “Formulating a Query,” and “Building a Query from Words in the Active Infobase,” on page 60.

7 Apply your search by activating the **OK** button.

> ***Tip:*** If you are using the Advanced Query window and are running a search of all open publications, instead activate the **Apply to All** button.

The given search mechanism closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See “Viewing Search Results Using the Table of Contents,” on page 88, for more information.)

Searching All Open Publications

In addition to narrowing a search, the *LexisNexis CD* application also offers you the option of broadening a search to a full-content search of all open publications.

> ***Note:*** To change search breadth in this manner, you must use the Advanced Query window as your search mechanism.

To search the full content of all open publications

1 Open the desired publications (see “Opening a Publication,” on page 10).

2 Open the Advanced Query window in one of the following ways:

- Press the **F2** key.

  OR

- From the **Search** menu choose **Advanced Query.**

  OR

- In main the toolbar activate .

3 In the **Query For** field, type your query.

> ***Note:*** See Chapter 6, “Formulating a Query,” and “Building a Query from Words in the Active Infobase,” on page 60, for additional information.

4 Apply your search by activating the **Apply to All** button (refer to Figure 5-1, on page 46).

The Advanced Query window closes, and the search results are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See “Viewing Search Results Using the Table of Contents,” on page 88, for more information.)

Searching All Publications in a Given Directory

In addition to narrowing a search to only certain publication divisions or structural elements, the *LexisNexis CD* application also offers you the option of broadening a search to the full-content of all publications in a given directory on your computer, regardless of whether the publications are open at the time.

> ***Note:*** To change search breadth in this manner, you use a special search mechanism called the Find Infobases dialog box.

To search all publications in a given directory

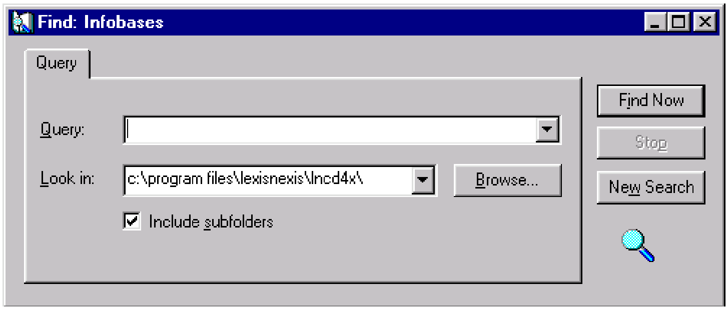
1 Open the Find Infobases dialog box in one of the following manners:

- Press CTRL + F.

  OR

- From the **File** menu choose **Find Infobases**.

Figure 7-2 Find Infobases dialog box



2 In the **Query** field (see Figure 7-2), type your query.

> ***Note:*** See Chapter 6, "Formulating a Query," for additional information.

3 Indicate the target directory in one of the following ways:

- In the **Look in** field, type the full path of the directory.

OR

- Activate the **Browse** button then navigate to the directory.

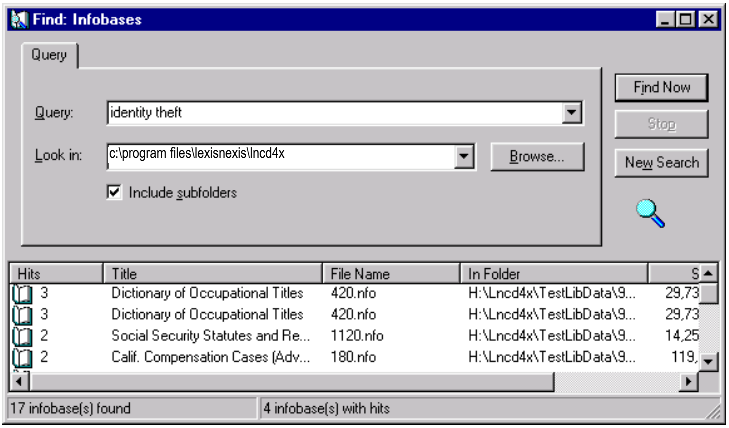
> ***Tip:*** If the target directory has subfolders containing publications that you want to include in your search, be sure to also click the check box beside the **Include subfolders** option until a check-mark appears in the box.

4 Activate the **Find Now** button.

Your search is run and the results listed in the area at the bottom of the Find Infobases dialog box (see Figure 7-3).

> ***Tip:*** To go to the first hit in a publication, double-click the publication title in the results list at the bottom of the dialog box. To run another search of all publications in a given directory, activate the **New Search** button and repeat steps 2 through 4.

Figure 7-3 Find Infobases dialog box showing search results



Chapter 8 Extending Search Functionality

The *LexisNexis® CD* application provides a number of features allowing you to extend search functionality. Specifically, you can do the following:

- Clear a search
- View search history and/or rerun a previous search
- Edit a search
- Search updated case content on the lexis.com® service

Clearing a Search

When you are done reviewing the results of a search, you may want to run a new search or clear hit highlighting from relevant publication content to ease reading. The *LexisNexis CD* application allows you to quickly and easily clear a search.

▸ To clear a search

From the **Search** menu choose **Clear Query.**

OR

In the main toolbar activate .

Search results are cleared from the Hit List pane, hit indicators are cleared from the table of contents, and hit highlighting is cleared from publication content in the Document pane.

Viewing Search History and Rerunning a Previous Search

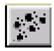
In certain situations, you may want to review searches run since opening a publication and/or re-run a previous search. For example, you may have cleared a search in order to research a different topic, only to realize that you neglected to note an item of significance related to the previous search. Using the *Show History* feature, you can quickly and easily view all searches run since the given publication was opened and re-run any such search, regardless of the search mechanism used to perform the search.

To view search history

After running one or more searches, activate the Show History feature in one of the following manners:

- From the **Search** menu choose **Show History.**

  OR

- In main the toolbar activate  .

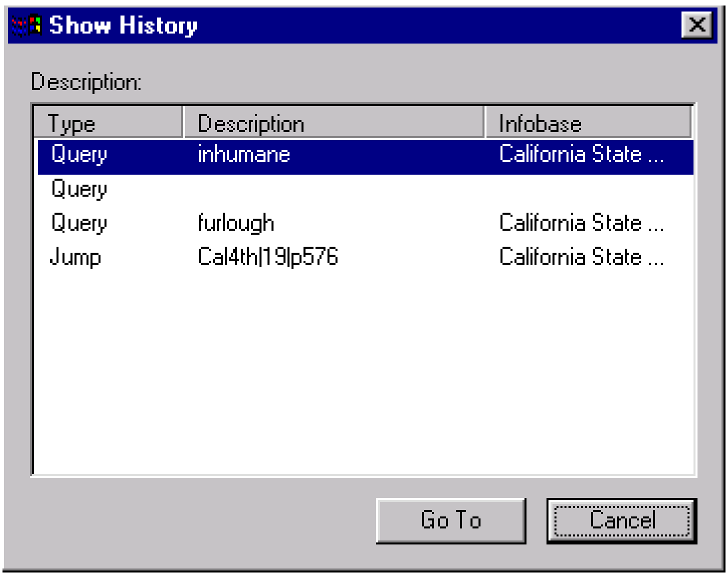
The Show History dialog box opens, displaying a list of searches run (as well as links completed) since you opened the given publication (see Figure 8-1).

> ***Tip:*** Searches are listed in reverse chronological order, i.e., the most recently performed search is listed first. Also reflected in the list are instances of cleared queries, indicated by the word *Query* without subsequent text.

To re-run a previous search

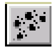
After running one or more searches, activate the Show History feature in one of the following manners:

Figure 8-1 Show History dialog box



- From the **Search** menu choose **Show History.**

  OR

- In main the toolbar activate  .

The Show History dialog box opens, displaying a list of searches run (as well as links completed) since you opened the given publication (refer to Figure 8-1, on page 76).

> ***Tip:*** Searches are listed in reverse chronological order, i.e., the most recently performed search is listed first. Also reflected in the list are instances of cleared queries, indicated by the word *Query* without subsequent text.

9 Re-run the desired search in one of the following ways:

- Put the focus on the corresponding search listing, then press ENTER or activate the **Go To** button.

  OR

- Double-click the search listing.

The Show History dialog box closes, and the results of the re-run search are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See “Viewing Search Results Using the Table of Contents,” on page 88, for more information.)

Tip: Depending on the search mechanism used to run a previous search, you may also be able to re-run the search directly from the search mechanism itself.

- If you used the Query dialog box or a query template, you can re-run the most recently performed search. Follow the instructions outlined under “To edit the most recent search run using the Query dialog box or a query template,” on page 79, with the exception of step 2 (editing the query).
- If you used the Advanced Query window, you can re-run any previous search of the current session. Follow the instructions outlined under “To edit any previous search run during the current session using the Advanced Query window,” on page 78, with the exception of step 4 (editing the query).

Editing a Search

After running a search, you may want to hone the corresponding query to eliminate unwanted hits.

- If using the Advanced Query window, you can access and edit any search run since the given publication was opened.
- If using either the Query dialog box or a query template, you can access and edit only the most recent search performed since the given publication was opened.

IMPORTANT! When you access a previously run search, note that only the query itself is recalled. Thus, if you narrowed the original search to only certain divisions of the active publication (by selecting those divisions in the table of contents) and want to do the same with the edited search, you must reselect the desired divisions before editing the corresponding query.

To edit any previous search run during the current session using the Advanced Query window

1 After running one or more searches using the Advanced Query window (refer to Figure 5-1, on page 46), open the window in one of the following manners:

- Press the **F2** key.

OR

- From the **Search** menu choose **Advanced Query**.

  OR

- In main the toolbar activate .

2 To the right of the Query For field at the bottom of the Advanced Query window, activate the **Prev** button.

  The most recently run query is displayed in the Query For field.

3 Locate the desired query, as applicable:

- If the most recently run query is the desired query, proceed to step 4.

  OR

- If the most recently run query is not the desired query, activate the **Prev** button until the desired query is displayed.

4 Edit the query as desired.

> ***Note:*** For additional information, see "Formulating a Query," on page 53, and "Building a Query from Words in the Active Infobase," on page 60. Note that you can also frame a query so that only certain structural elements within the publication will be searched. See "Searching a Structural Element (Scope) in One or All Open Publications," on page 67, for further details.

5 Activate the **OK** button.

  The Advanced Query window closes, and the results of your edited search are displayed in the Contents, Document, and Hit List panes. (For further information, see "Viewing Search Results," beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See "Viewing Search Results Using the Table of Contents," on page 88, for more information.)

▸ To edit the most recent search run using the Query dialog box or a query template

1 After running a search using the Query dialog box or a query template, open the applicable search mechanism as follows:

- ***To open the Query dialog box***, either press the **F3** key or activate the **Search** menu then choose **Query**.

  OR

- ***To open a query template***, either activate the **Search** menu then choose the corresponding name from the bottom of the menu or activating the corresponding  button in the main toolbar.

The search mechanism opens, displaying the previous query in the applicable field(s).

> ***Tip:*** If the previous query is not displayed, activate the **Tools** menu then choose **Options**. In the Options dialog box, activate the **Query** tab then click the check box beside the **Previous query in query dialog** option until a checkmark appears in the box. Finally, activate the **OK** button to close the Options dialog box.

2 Edit the query as desired.

> ***Note:*** For additional information, see “Formulating a Query,” on page 53. If you are working in a query template, note that you can edit your query so that it uses words from the active infobase and/or will be applied to only certain structural elements within the publication. See “Building a Query from Words in the Active Infobase,” on page 60, and “Searching a Structural Element (Scope) in One or All Open Publications,” on page 67, for further details.

3 Click **OK**.

The given search mechanism closes, and the results of your edited search are displayed in the Contents, Document, and Hit List panes. (For further information, see “Viewing Search Results,” beginning on page 83.)

> ***Note:*** If you have enabled the *Headings with Hits* option, the table of contents is updated to list only those searched levels containing records with hits. (See “Viewing Search Results Using the Table of Contents,” on page 88, for more information.)

Searching Updated Case Content on the *lexis.com* Service

After you run a search of a case collection, the *LexisNexis CD* application allows you to re-run the same search on the *lexis.com* online research service. In this way, you can search any cases that may have been added to the collection since the most recent CD release.

The *LexisNexis CD* application simplifies this process by linking directly to the *lexis.com* service and automatically translating the search into the syntax required to re-run the search on that service.

▸ To search updated case content on the *lexis.com*® service

1 After running a search of a case collection using the *LexisNexis CD* application, press **SHIFT + C** or activate the **LexisNexis** menu then choose **Case Update**.

   One of the following happens:

   - If you have not previously set the *lexis.com* service to remember your sign-on information, your browser opens to the *lexis.com* Sign On page. Proceed to step 2.

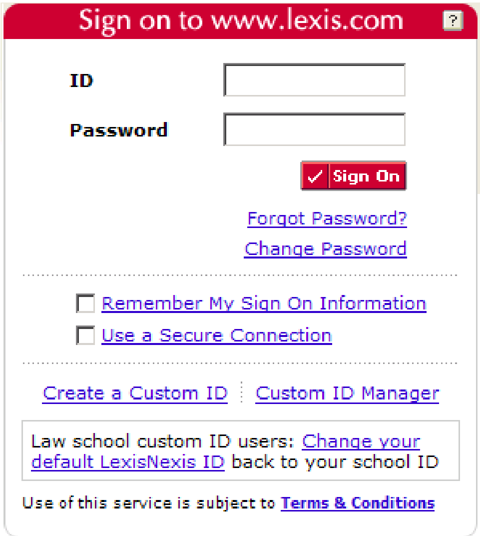
   OR

   - If you have previously set the *lexis.com* service to remember your sign-on information, your browser opens to the Enter Search Terms page on the *lexis.com* service. Proceed to step 4.

2 In the *lexis.com* Sign On dialog (see Figure 8-2), type your **LexisNexis ID** and your **Password** in the corresponding fields.

> ***Note:*** If you want to use a secure connection or want the system to remember your sign-on information in the future, click the corresponding check boxes to enable these options. Note that if you elect to have the system remember your sign-on information, the Sign On page will not be displayed the next time you use the Case Update feature.

Figure 8-2 ***lexis.com*** **Sign-On dialog**



3 Activate the **Sign On** button.

The *lexis.com* service opens to the Enter Search Terms page, where your translated query is displayed.

4 On the Enter Search Terms page, activate the **Search** button.

Your search results are displayed in the browser window.

5 After viewing the search results, sign off and close the browser window for the *lexis.com* service.

The *LexisNexis CD* main window is again revealed.

Chapter 9 Viewing Search Results

Viewing search results in the *LexisNexis® CD* application requires an understanding of the following:

- Post-search changes to the main window
- Means of viewing search results
- Limiting publication content displayed after a search

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Understanding Post-Search Changes to the Main Window

When you first run a search after opening the *LexisNexis CD* application, the main window reflects the changes outlined following (and illustrated in Figure 2-3, on page 17):

- The focus in the Document pane moves to the beginning of the first record containing a hit, or query match. Within the publication content, each hit is highlighted.
- The Hit List pane displays a list of hits grouped by record.

> ***Note:*** When you run a search using the Query dialog box, the program returns as search results only up to 50 records containing hits. Furthermore, those records are ranked according to relevancy. Thus, entries in the hit list may not reflect the order of their occurrence in publication content. For further details, see "Search Results Compilation in Natural Language Searching," on page 63

- The table of contents shows the number of records containing hits for each searched level having such records and, if you have enabled the corresponding preference, reflects the titles of only those searched levels containing records with hits. (For further details on setting preferences related to the table of contents and searching, see "Viewing Search Results Using the Table of Contents," on page 88.)

> ***Note:*** The above-noted scenario assumes that you have elected the All view. If this is not the case, only the item(s) corresponding to the view that you've instructed the program to display will be applicable. Note that you can change your view at any time by clicking the desired tab at the bottom of the main window.

- The status bar displays the active query along with the number of the active record containing hits relative to the total number of records containing hits.

Understanding Means of Viewing Search Results

Depending on your reasons for running a search, you may want to view the results of that search at varying degrees of detail. For instance, if you were trying to find a specific document that you would recognize upon seeing its title, you may want to view at a glance those records returned as search results. If, on the other hand, you were performing initial research on a topic with which you are not all that familiar, you may want to focus on each hit within the document. The *LexisNexis CD* application is designed to afford you such flexibility in viewing search results.

Viewing Search Results at a Glance

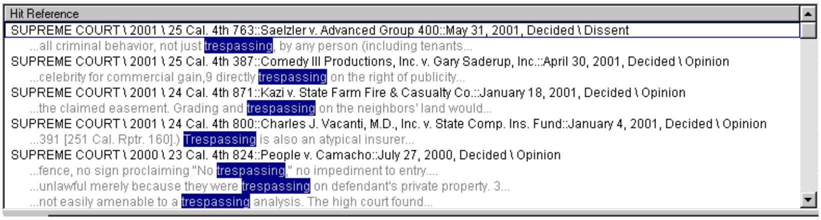
The *LexisNexis CD* application offers two vehicles for viewing search results at a glance:

- The hit list
- The table of contents

Viewing Search Results Using the Hit List

> ***Note:*** Because the *LexisNexis CD* application allows you to choose at any time between several view settings, the hit list may not always be displayed. To display the hit list, elect either the All, the Search, or the Hit List view by clicking the corresponding tab in the upper portion of the main window.

Figure 9-1 Sample hit list



When you complete a search, the Hit List pane by default displays a list of hits grouped by record in the order in which the records appear in publication content (see Figure 9-1).

IMPORTANT! When you run a search using the Query dialog box, the program returns as search results only up to 50 records containing hits. Furthermore, those records are ranked according to relevancy. Thus, entries in the hit list may not reflect the order of their occurrence in publication content. For further details, see “Search Results Compilation in Natural Language Searching,” on page 63.

Each record entry in the hit list reflects complete source information for that record. Record entries are set flush left in the Hit List pane.

Each hit entry takes the form of a content excerpt consisting of the hit along with 10 words on either side. Hit entries are set indented below their respective record entries.

Note: In cases where hits occur within 10 words of each other, a single hit entry in the hit list may reflect more that one hit.

Each record entry in the hit list serves as a direct jump link to the beginning of that record in publication content. Likewise, each highlighted hit in the hit list serves as a direct jump link to that hit in publication content.

Tip: To move among records containing hits or among hits within records, you may also use the aids for navigating search results in publication content. (See “Viewing Search Results in Detail,” on page 91.)

The program does allow for some flexibility with regard to the hit list. Specifically, you can:

- Hide hit entries in the hit list (i.e., display only record entries in the hit list).

OR

- Change the scope of hit entries so that each entry consists of the hit along with as few as 1 or as many as 50 words on either side.

To view results within the hit list

Press the UP ARROW, DOWN ARROW, LEFT ARROW, and RIGHT ARROW keys or use the vertical and horizontal scroll bars to adjust your view as needed to view results.

To display record content from the hit list

1. In the hit list, press the UP ARROW or DOWN ARROW keys or use the vertical scroll bar to adjust your view until you find a record that you want to display.
2. Display the record in one of the following manners:
   - Press ENTER.

   OR

   - Double-click the title of the desired record.

   The view in the Document pane scrolls to the beginning of the record in publication content.

To display a hit in publication content from the hit list

1. In the hit list, use the vertical scroll bar to adjust your view until you find a hit that you want to display.
2. Double-click the desired hit.

   The view in the Document pane scrolls to the occurrence of the hit in publication content.

To temporarily hide hit entries in the hit list

1. Position your cursor anywhere in the Hit List pane.
2. From the **View** menu choose **Words around Hits**.

   Assuming you had previously run a search, the hit entries are cleared from the hit list leaving only the record entries.

> ***Tip:*** To again show hit list entries in the hit list, repeat the above process.

> ***Note:*** You can also set your preferences to always hide hit entries in the hit list. To do so, activate the **Tools** menu and choose **Options**. In the Options dialog box, activate the **Hit List** tab, then activate the check box beside **Words around Hits** until the checkmark is cleared, and, finally, activate the **OK** button.

To change the scope of hit entries in the hit list

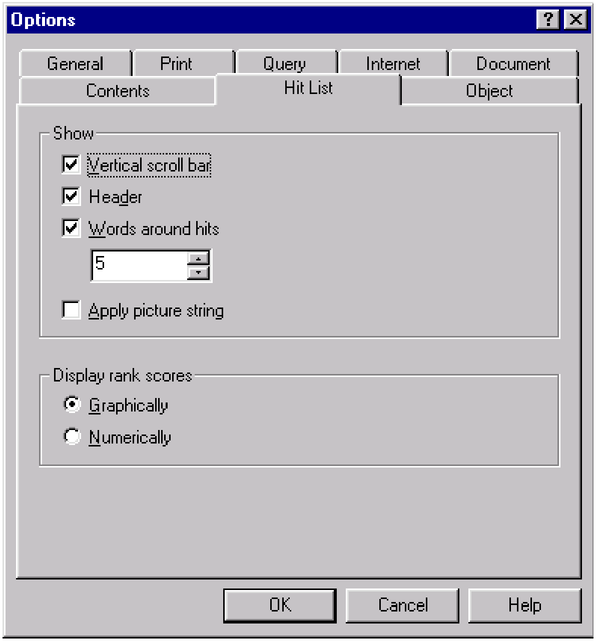
> ***Note:*** The functionality is not applicable when running the program in accessibility mode.

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **Hit List** tab (see Figure 9-2).

Figure 9-2 Hit List tab in the Options dialog box



3 In the field below the **Words around hits** option, type the desired number of words to display on either side of hits in hit list entries.

> ***Tip:*** You can also click the up or down arrow on the right-hand side of the field until the desired number is displayed. Note that by typing or selecting a number in this field, you automatically enable the Words Around Hits option, as indicated by the check-mark in the corresponding check box. Conversely, by typing or selecting 0 in this field, you disable the option.

4 Activate the **OK** button.

The Option dialog box closes, and the hit entries are updated to reflect the designated scope.

Viewing Search Results Using the Table of Contents

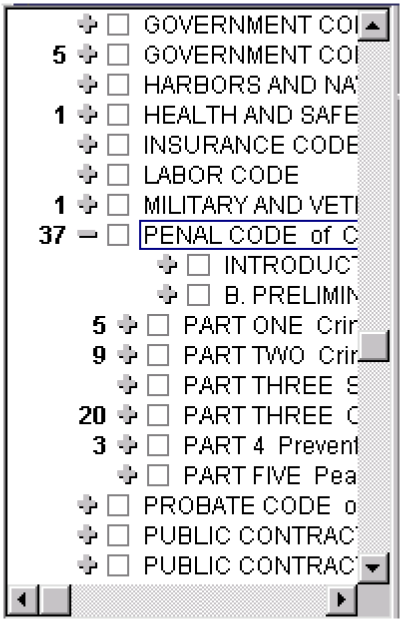
Like the hit list, the table of contents can be used as a vehicle for viewing search results at a glance. The *LexisNexis CD* application offers two options for customizing the table of contents to reflect search results, which can be used together or separately:

- ***Query Results*** — By default, this option is enabled. When you run a search, the table of contents will display the number of records containing hits (query matches) for each searched level having such records (see Figure 9-3).

> ***Tip:*** If a searched level has one or more subordinate levels containing hits, the number displayed beside the (superior) level will reflect the total number of subordinate levels having hits. Thus, if a searched level has five subordinate levels, three of which contain hits, the number *3* will be displayed beside the title of the superior level. If a searched level has no subordinate levels but itself contains hits, the number *1* will be displayed beside the title of the level to indicate that one record within that level (i.e., the level itself) contains hits.

- ***Headings with Hits*** — By default, this option is disabled. When you run a search, the table of contents will list only those searched levels containing records with hits.

Figure 9-3 Number of hits shown in the table of contents



> ***Note:*** This option takes precedence over automatic synchronization of the table of contents. Thus, if after running a search, you navigate to a record having no hits, the table of contents will not synchronize to your current location. To re-enable automatic synchronization in such an instance, either disable the *Headings with Hits* option (see “To enable or disable display of only headings with hits in the table of contents,” on page 90) or clear the search (see “Clearing a Search,” on page 75).

▸ To enable or disable display of query results in the table of contents

> ***Note:*** When running the program in non-accessibility mode, this option is enabled by default. This option is not available when running the program in accessibility mode.

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **Contents** tab (refer to Figure 3-4, on page 34).

3 Indicate your preference for displaying query results in the table of contents:

- To enable this option (i.e., have the table of contents display query results), activate the check box beside **Query results** until a checkmark appears in the check box.

  OR

- To disable this option, activate the check box beside **Query results** until the checkmark is cleared from the check box.

4 Activate the **OK** button.

> ***Tip:*** Alternatively, activate the **Cancel** button to exit the Options dialog box without making any changes.

Your preference for displaying query results in the table of contents is set, and the Options dialog box closes.

> ***Note:*** If you previously ran a search and your view is set to display the table of contents, the hit indicators will be displayed as soon as you close the Options dialog box.

To enable or disable display of only headings with hits in the table of contents

1 From the **Tools** menu choose **Options.**

The Options dialog box opens.

2 Activate the **Contents** tab (refer to Figure 3-4, on page 34).

3 Indicate your preference for having the table of contents display only headings with hits after a search:

- To enable this option (i.e., have the table of contents list only headings with hits after a search), activate the check box beside the **Headings with hits** option until a checkmark appears in the check box.

  OR

- To disable this option, activate the check box beside the **Headings with hits** option until the checkmark is cleared from the check box.

4 Activate the **OK** button.

Your preference for having the table of contents list only headings with hits after a search is set, and the Options dialog box closes.

> ***Note:*** If you previously ran a search and your view is set to display the table of contents, only those headings containing records with hits will be displayed in the table of contents as soon as you close the Options dialog box.

Viewing Search Results in Detail

The *LexisNexis CD* application provides a number of navigation aids to assist you in viewing search results at the level of hits (query matches) within publication content. Specifically, the following navigational commands are offered:

- The ***Next Hit*** command moves the focus in the Document pane to the hit immediately following the currently highlighted hit in the currently displayed record.

> ***Tip:*** If there is no "next hit" within the currently displayed record, executing this command will move the focus to the first hit in the next record containing hits. If you navigate to the last hit in publication content, the Next Hit option becomes unavailable.

- The ***Previous Hit*** command moves the focus in the Document pane to the hit immediately preceding the currently highlighted hit in the currently displayed record.

> ***Tip:*** If there is no "previous hit" within the currently displayed record, executing this command will move the focus to the last hit in the previous record containing hits. Note also that this command becomes available only after you have navigated beyond the first hit in publication content. If you subsequently navigate back to the first hit, the command again becomes unavailable.

- The ***Next Record Hit*** command moves the focus in the Document pane to the beginning of the first record that follows the currently displayed record and contains hits.

> ***Tip:*** If you navigate to the last record containing a hit, this command becomes unavailable.

- The ***Previous Record Hit*** command moves the focus in the Document pane to the beginning of the first record that precedes the currently displayed record and contains hits.

> ***Tip:*** If the focus is currently on the first hit in publication content and you execute this command, the focus will move to the beginning of the record containing the first hit.

To highlight and move the focus to the next hit within a record

Press the **F4** key.

OR

From the **Navigate** menu choose **Next Hit.**

OR

In the main toolbar activate  .

> ***Tip:*** If there is no next hit within the currently displayed record, executing the command will move the focus to the first hit in the next record containing hits.

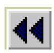
To highlight and move the focus to the previous hit within a record

Press **SHIFT + F4.**

OR

From the **Navigate** menu choose **Previous Hit.**

OR

In the main toolbar activate  .

> ***Tip:*** If there is no previous hit within the currently displayed record, activating this button will move the focus to the last hit in the previous record containing hits.

To highlight and move the focus to the next record containing hits

Press the **F5** key.

OR

From the **Navigate** menu choose **Next Record Hit**.

OR

In the main toolbar activate .

> ***Tip:*** If you navigate to the last record containing a hit, this command becomes unavailable.

- **To highlight and move the focus to the previous record containing hits**

Press SHIFT + F5.

OR

From the **Navigate** menu choose **Previous Record Hit**.

OR

In the main toolbar activate .

> ***Tip:*** If the focus is currently on the first hit in publication content and you execute this command, the focus will move to the beginning of the record containing the first hit.

Limiting Content Displayed After a Search

After you run a search, the *LexisNexis CD* application defaults to display complete publication content in the Document pane, highlighting hits within the content to help you find relevant information. You can, however, further home in on search results by instructing the program to always limit the content displayed in the Document pane after a search to only those records containing hits.

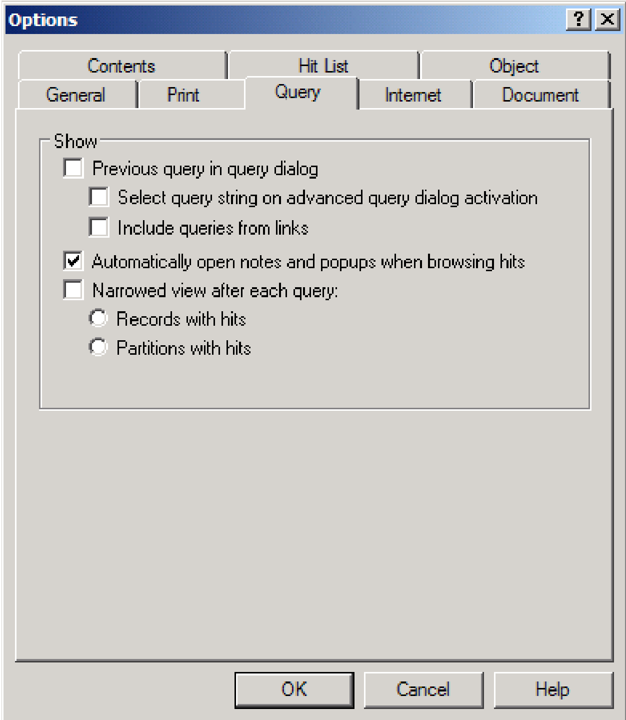
> ***Note:*** When setting your program preferences to limit the content displayed after a search, your preference is reflected the next time you run a search.

- **To limit the content displayed after a search**

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

Figure 9-4 Query tab in Options dialog box



2 Activate the **Query** tab (see Figure 9-4).

3 Activate the check box beside the **Narrowed view after each query** option until a checkmark appears in the box.

4 Activate the radio button beside the **Record with hits** sub-option.

> ***Tip:*** Alternatively, you can activate the **Partitions with hits** sub-option.

5 Activate the **OK** button.

The Options dialog box closes, again revealing the main window.

> ***Note:*** Your chosen preference will be reflected the next time you run a search.

> ***Tip:*** You can also instruct the application to temporarily display only records with hits. To do so, first run a search, next place the focus anywhere in the Document pane, then activate the **View** menu and choose **Records with Hits**. Note that when you limit display of content in this manner, the next time you run a search, the program will default to again display all records in the publication.

Chapter 10 Printing and Reusing Content

The *LexisNexis® CD* application offers flexibility in printing information, allowing you to print any of the following for the active publication:

- Partial content
- All or selected table of contents entries
- All or specified hit list entries

The *LexisNexis CD* application also provides options for transferring content to other applications, thereby allowing you to reuse* that content in your own documents. You can do either of the following:

- Copy and paste selected content from the *LexisNexis CD* application
- Export portions of the active publication in a format compatible with an outside application

Printing Content

The *LexisNexis CD* application provides multiple options for printing content. You can print any of the following for the active publication:

- Content as selected in the Document pane
- Content of selected divisions or specified records in the active publication
- All tagged content
- All top-level table of contents entries
- All displayed table of contents entries
- Active table of contents segment
- Table of contents entries for specified records
- All or specified hit list entries for the most recently performed search of the active publication

Regardless of the content that you elect to print, you can further hone the results by setting printing preferences.

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* Subject to Terms and Conditions

Instructions for performing each of these tasks follow.

To print content selected in the active publication

> ***Tip:*** See "Setting Printing Preferences," on page 110, for information on further honing your printing results.

1. Open the publication from which you want to print (see "Opening a Publication," on page 10).
2. In the Document pane, position your cursor at the beginning of the desired content.
3. Select the desired content in one of the following ways:
   - Press and hold the SHIFT key, press and hold the RIGHT ARROW key until the desired content is selected, then release the SHIFT and RIGHT ARROW keys.

     OR
   - While holding down the left mouse button, drag the mouse until the cursor is positioned at the end of the desired content, then release the mouse button.

     OR
   - Press and hold the SHIFT key, click at the end of the desired content, then release the SHIFT key.

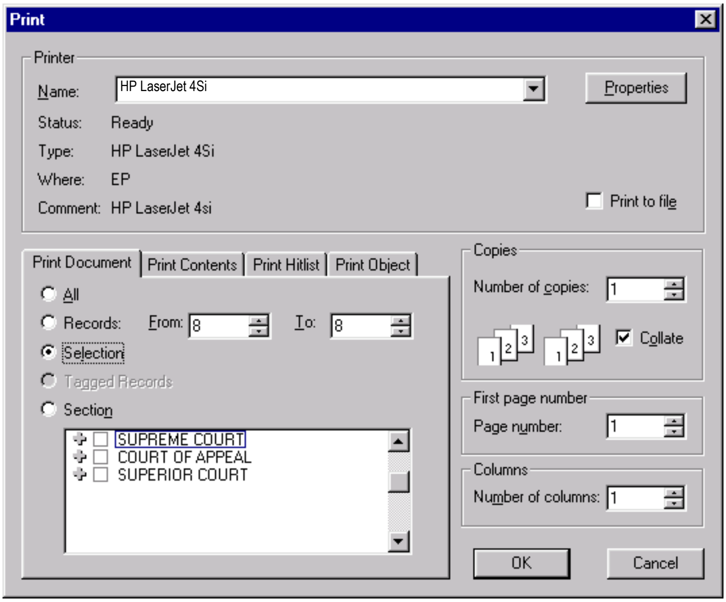
   The desired content is highlighted.
4. Open the Print dialog box (see Figure 10-1) in one of the following manners:
   - Press CTRL + P.

     OR
   - From the **File** menu choose **Print**.

     OR
   - In the main toolbar activate  .
5. On the **Print Document** tab, verify that the **Selection** option is enabled.
6. Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

   The Print dialog box closes and the selected content prints to the designated printer.

Figure 10-1 Print dialog box displaying the Print Document tab



▸ To print the content of selected divisions in the active publication

> ***Tip:*** See "Setting Printing Preferences," on page 110, for information on further honing your printing results.

1. Open the publication from which you want to print (see "Opening a Publication," on page 10).
2. From the **Tools** menu choose **Options**.

   The Options dialog box opens.
3. Activate the **Print** tab (refer to Figure 10-6, on page 110).
4. Enable the **Allow interaction between print dialog and TOC** option by activating the corresponding check box until a checkmark appears.
5. Activate the **OK** button to close Options dialog box.
6. In the publication table of contents, expand or collapse the hierarchy to display the entries for the desired content.

7 Select the desired division(s) by activating the check box(es) beside the corresponding heading(s) until a checkmark appears in the box(es).

> ***Tip:*** If check boxes are not currently displayed in the table of contents, do one of the following:
>
> - To display check boxes only for the current publication and session, activate the **View** menu then choose **Show Check Boxes**.
> - To display check boxes for all publications and sessions, activate the **Tools** menu then choose **Options**. In the Options dialog box, activate the **Contents** tab then activate the check box beside the **Checked Branches** option until a checkmark appears. Finally, activate the **OK** button to close the Options dialog box.

8 Open the Print dialog box (refer to Figure 10-1, on page 99) in one of the following manners:

- Press **CTRL + P**.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate .

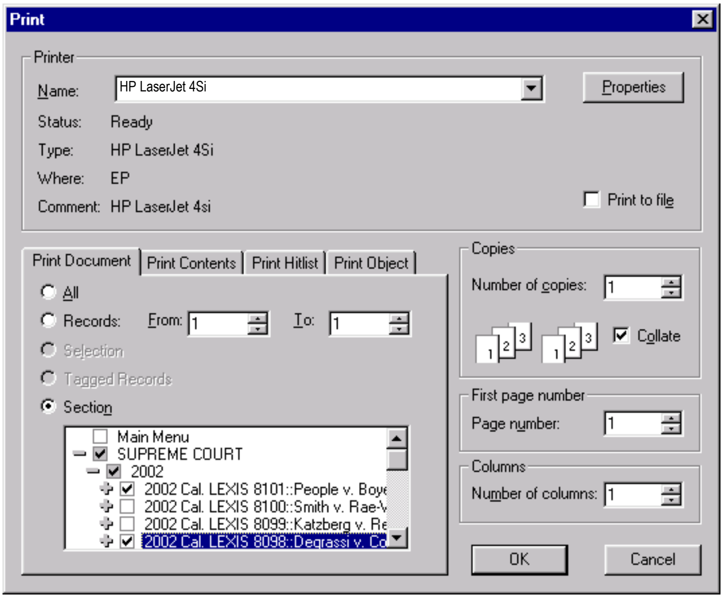
9 On the **Print Document** tab, enable the **Section** option and verify that your division selections are reflected in the area immediately below (see Figure 10-2).

> ***Note:*** If you neglected to select the desired divisions before opening the Print dialog box, note that you can indicate your selections here. To do so, expand the hierarchy until the desired divisions are displayed, then click the check box corresponding to each desired division until a checkmark appears.

10 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the content of the chosen divisions prints to the designated printer.

Figure 10-2 Divisions selected in Section area



IMPORTANT! After printing the desired content, be sure either deselect the entries in the table of contents or disable the **Allow interaction between print dialog and TOC** option via your Print preferences (see “Setting Printing Preferences,” on page 110). Failure to do so may cause undesired results when subsequently running a search or printing.

▸ To print content of specified records in the active publication

Note: In order to print the content of specified records, you must know the corresponding record numbers. If you do not have this information, you may instead want to print the content of selected publication divisions (see “To print the content of selected divisions in the active publication,” on page 99).

Tip: See “Setting Printing Preferences,” on page 110, for information on further honing your printing results.

1 Open the publication from which you want to print (see “Opening a Publication,” on page 10).

2 Open the Print dialog box in one of the following manners:

- Press CTRL + P.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate .

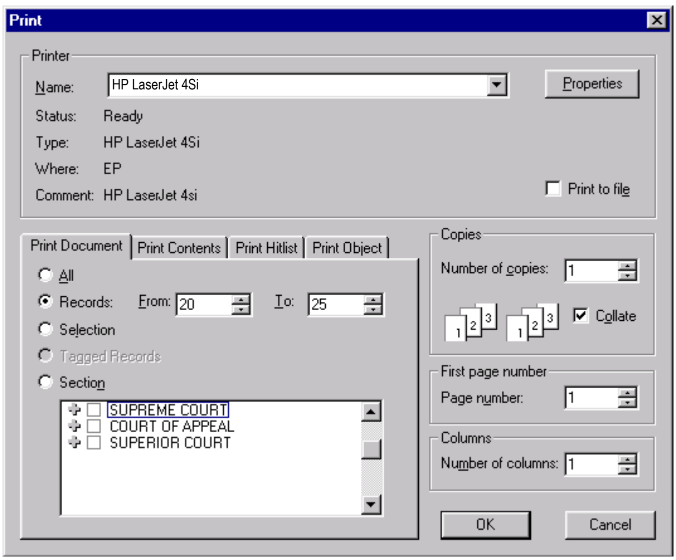
3 On the **Print Document** tab (refer to Figure 10-1, on page 99), enable the **Records** option.

4 In the **From** field, type the number of the first record whose content you want to print, and in the **To** field, type the number of the last record whose content you want to print (see Figure 10-3).

5 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the content of the specified records prints to the designated printer.

Figure 10-3 Record selections for printing of content



To print all tagged content in the active publication

> ***Tip:*** See “Setting Printing Preferences,” on page 110, for information on further honing your printing results.

1. Open the publication from which you want to print (see “Opening a Publication,” on page 10).
2. Tag the desired content. (For details on tagging content, see “Tagging Content,” on page 127.)
3. Open the Print dialog box in one of the following manners:
   - Press **CTRL + P**.

     OR
   - From the **File** menu choose **Print**.

     OR
   - In the main toolbar activate  .
4. On the **Print Document** tab (refer to Figure 10-1, on page 99), enable the **Tagged Records** option.
5. Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

   The Print dialog box closes and the content of all tagged records in the active publication prints to the designated printer.

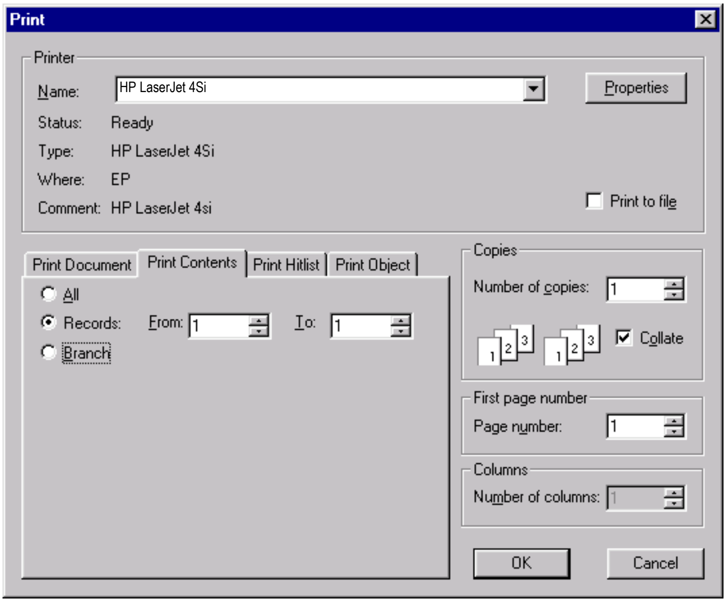
To print all top-level table of contents entries for the active publication

1. Open the publication from which you want to print (see “Opening a Publication,” on page 10).
2. Open the Print dialog box in one of the following manners:
   - Press **CTRL + P**.

     OR
   - From the **File** menu choose **Print**.

     OR
   - In the main toolbar activate  .
3. On the **Print Contents** tab (see Figure 10-4), activate the radio button beside **All**.

Figure 10-4 Print dialog box displaying the Print Contents tab



4 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the complete table of contents for the active publication prints to the designated printer.

To print all displayed table of contents entries for the active publication

> ***Tip:*** See "Setting Printing Preferences," on page 110, for information on further honing your printing results.

1 Open the publication from which you want to print (see "Opening a Publication," on page 10).

2 From the **Tools** menu choose **Options**.

The Options dialog box opens.

3 Activate the **Print** tab (refer to Figure 10-6, on page 110).

4 Enable the **Allow interaction between print dialog and TOC** option by activating the corresponding check box until a checkmark appears.

5 Activate the **OK** button to close Options dialog box.

6 In the publication table of contents, expand the hierarchy until all desired entries are displayed.

7 Open the Print dialog box in one of the following manners:

- Press CTRL + P.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate  .

8 On the **Print Contents** tab (refer to Figure 10-4, on page 104), activate the radio button beside **All**.

9 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the complete table of contents for the active publication prints to the designated printer.

> ***IMPORTANT!*** After printing the desired entries, be sure disable the **Allow interaction between print dialog and TOC** option via your Print preferences (see "Setting Printing Preferences," on page 110). Failure to do so may cause undesired results when subsequently printing.

To print the active table of contents segment

> ***Tip:*** See "Setting Printing Preferences," on page 110, for information on further honing your printing results.

1 Open the publication from which you want to print (see "Opening a Publication," on page 10).

2 From the **Tools** menu choose **Options**.

The Options dialog box opens.

3 Activate the **Print** tab (refer to Figure 10-6, on page 110).

4 Enable the **Allow interaction between print dialog and TOC** option by activating the corresponding check box until a checkmark appears.

5 Activate the **OK** button to close Options dialog box.

6 In the publication table of contents, expand the hierarchy until the desired entries are displayed, then place the focus on the entry that begins the segment of entries you want to print.

> ***Note:*** This will print the selected entry along with all displayed sub-entries to the selected entry.

7 Open the Print dialog box in one of the following manners:

- Press CTRL + P.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate  .

8 On the **Print Contents** tab (refer to Figure 10-4, on page 104), enable the **Branch** option.

9 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the chosen table of contents entries print to the designated printer.

> ***IMPORTANT!*** After printing the desired segment, be sure disable the **Allow interaction between print dialog and TOC** option via your Print preferences (see "Setting Printing Preferences," on page 110). Failure to do so may cause undesired results when subsequently printing.

To print table of content entries for specified records in the active publication

> ***Note:*** In order to print the table of contents entries for specified records, you must know the corresponding record numbers. If you do not have this information, you may instead want to print selected table of contents entries (see “To print the active table of contents segment,” on page 105).

> ***Tip:*** See “Setting Printing Preferences,” on page 110, for information on further honing your printing results.

1 Open the publication from which you want to print (see “Opening a Publication,” on page 10).

2 Open the Print dialog box in one of the following manners:

- Press CTRL + P.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate .

3 On the **Print Contents** tabs (refer to Figure 10-4, on page 104), enable the **Records** option.

4 In the **From** field, type the number of the first record whose table of contents entry you want to print, and in the **To** field, type the number of the last record whose table of contents entry you want to print.

5 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the table of contents entries for the specified records print to the designated printer.

To print all hit list entries for the most recently performed search of the active publication

> ***Tip:*** See “Setting Printing Preferences,” on page 110, for information on further honing your printing results.

> ***Note:*** When you print hit list entries, only the entries as they appear in the hit list are printed; the corresponding content is ***not*** printed.

1 Open the publication from which you want to print (see "Opening a Publication," on page 10).

2 Run a search of the publication.

3 Open the Print dialog box in one of the following manners:

- Press CTRL + P.

  OR

- From the **File** menu choose **Print**.

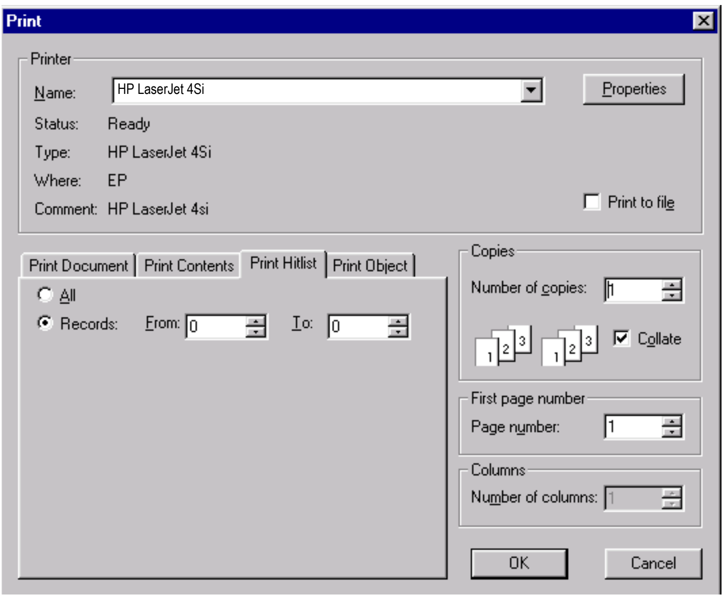
  OR

- In the main toolbar activate .

4 On the **Print Hitlist** tab (see Figure 10-5), enable the **All** option.

5 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

Figure 10-5 Print dialog box displaying the Print Hitlist tab



The Print dialog box closes and the hit list entries for the most recently performed search of the active publication print to the designated printer.

▸ To print specified hit list entries for the most recently performed search of the active publication

> ***Tip:*** See “Setting Printing Preferences,” on page 110, for information on further honing your printing results.

> ***Note:*** When you print hit list entries, only the entries as they appear in the hit list are printed; the corresponding content is ***not*** printed.

1 Open the publication from which you want to print (see “Opening a Publication,” on page 10).

2 Run a search of the publication.

3 Open the Print dialog box in one of the following manners:

- Press **CTRL + P**.

  OR

- From the **File** menu choose **Print**.

  OR

- In the main toolbar activate  .

4 On the **Print Hitlist** tab (refer to Figure 10-5, on page 108), enable the **Records** option.

5 In the **From** field, type the number of the first hit list entry that you want to print, and in the **To** field, type the number of the last hit list entry that you want to print.

> ***Note:*** Each of these values refers to the entry’s number in the hit list as opposed to the corresponding record’s number in the overall publication. Thus, for example, the third record in the hit list may be record 342 in the overall publication. To instruct the program to start the print output with the hit list entry for this record, then, you would enter *3* in the From field.

6 Set additional print options (e.g., printer, number of columns), as desired, then activate the **OK** button.

The Print dialog box closes and the specified hit list entries for the most recently performed search of the active publication print to the designated printer.

Setting Printing Preferences

Regardless of the content that you elect to print, you can further hone the results by setting printing preferences.

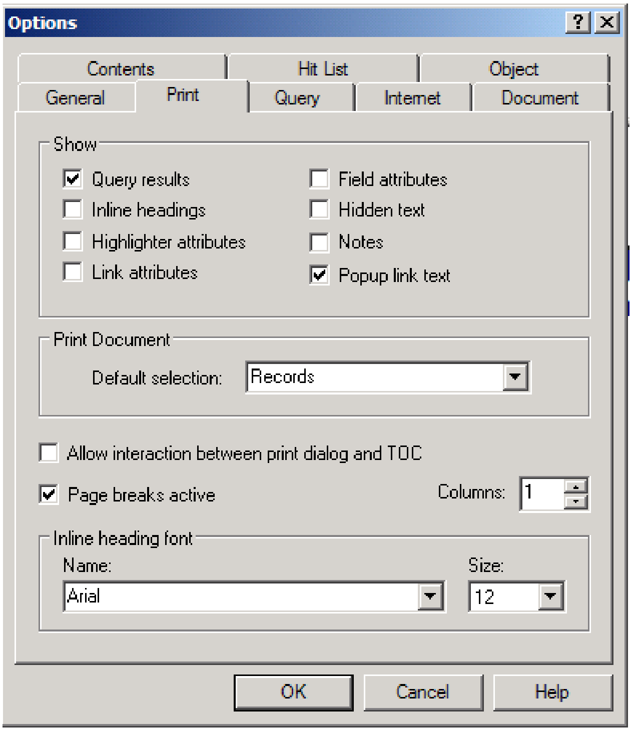
To set printing preferences

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **Print** tab (see Figure 10-6).

Figure 10-6 Print tab in the Options dialog box



3 In the **Show** area, indicate whether you want to hide or show the following in printed material, inserting a checkmark in the corresponding check box to show the item or clearing a checkmark to hide the item:

- **Query results** (hit highlighting when printing either publication content or the hit list)
- **Inline headings** (full source information for content)

> ***Note:*** If you elect to show inline headings, note that full source information (e.g., volume, chapter, and section) will print preceding ***each*** record printed.

- **Highlighter attributes** (visual enhancement applied by the user to content in a shadow file)
- **Link attributes** (visual enhancement, typically underscoring, used to indicate a link in publication content)
- **Field attributes** (visual enhancement used to indicate a given field in publication content)
- **Hidden text** (material specific to the production of the active publication)
- **Notes** (annotations posted by the user to content in a shadow file)
- **Popup link text** (supplementary material formatted apart from the main publication content flow)

4 In the **Print Document** area, indicate which increment of publication content you will want to print under most circumstances, choosing either **Record**, **Section**, or **All** from the **Default Selection** drop-down list.

5 Indicate whether you want selections you make in the table of contents to carry over to the Print Document tab in the Print dialog box and vice versa, inserting a checkmark in the **Allow interaction between print dialog and TOC** check box to enable carry over or clearing a checkmark to disable carryover.

6 Indicate whether you want printed material to reflect page breaks coded into publication content, inserting a checkmark in the **Page breaks active** check box to include page breaks or clearing a checkmark to exclude page breaks.

7 In the corresponding field, indicate the desired number of **Columns** for the print output.

> ***Note:*** While certain publication content (e.g., case content) lends itself well to dual-column print output, note that content to which formatting is integral (e.g., tables) should be printed to a single column.

8 In the **Inline heading font** area, select the **Name** and **Size** of the font that you want to use for printing inline headings (i.e., full source information).

9 Activate the **OK** button.

The Options dialog box closes, and your printing preferences are set.

Transferring Content to Other Applications

The *LexisNexis CD* application provides options for transferring content to other applications, thereby allowing you to reuse that content in your own documents (subject to Terms and Conditions).

The options for transferring content are as follows:

- Copying content from the active publication in the *LexisNexis CD* application and pasting it into another application.
- Exporting portions of the active publication from the *LexisNexis CD* application in a format compatible with another application.

Copying and Pasting Content

One method of transferring content from the *LexisNexis CD* application to an outside program is copying and pasting, much as you do between other applications.

▸ To copy and paste content from the active publication

1 Open the applicable publication (see “Opening a Publication,” on page 10).

2 In the Document pane, click at the beginning of the desired content.

3 Select the desired content in one of the following ways:

- Press and hold the SHIFT key, press and hold the RIGHT ARROW key until the desired content is selected, then release the SHIFT and RIGHT ARROW keys.

  OR

- While holding down the left mouse button, drag the mouse until the cursor is positioned at the end of the desired content, then release the mouse button.

  OR

- Press and hold the SHIFT key, click at the end of the desired content, then release the SHIFT key.

The desired content is highlighted.

4 Execute the copy command in one of the following ways:

- Press CTRL + C.

  OR

- From the **Edit** menu choose **Copy.**

5 Open the destination program (i.e., the application into which you want to paste the copied content).

6 In the destination program, execute the paste command in one of the following ways:

- Press CTRL + V.

  OR

- From the **Edit** menu choose **Paste**.

The content is pasted in the destination program.

Exporting Content

A second method of transferring content from the *LexisNexis CD* application to an outside program is exporting the content in a format compatible with that outside program. The *LexisNexis CD* application allows you to export any of the following for the active publication:

- Content as selected in the Document pane
- Content of selected divisions
- All tagged content
- Only that content containing hits resulting from the most recently performed search

Procedures for exporting each of the preceding elements follow.

▸ To export publication content as selected in the Document pane

> ***Note:*** When you select text in the Document pane for purposes of exporting, note that the entire record is considered selected; thus, if you want to export a given paragraph that is part of a record containing multiple paragraphs, all paragraphs will be exported together as a single unit.

> ***Tip:*** Using this method, you can export only contiguous content segments. If you would like to export noncontiguous content segments, consider exporting tagged content (see "To export all tagged content in the active publication," on page 116) or content of selected divisions (see "To export content of selected divisions in the active publication," on page 115).

1. Open the applicable publication (see "Opening a Publication," on page 10).
2. In the Document pane, position your cursor at the beginning at the beginning of the desired content.
3. Select the desired content in one of the following ways:
   - Press and hold the SHIFT key, press and hold the RIGHT ARROW key until the desired content is selected, then release the SHIFT and RIGHT ARROW keys.

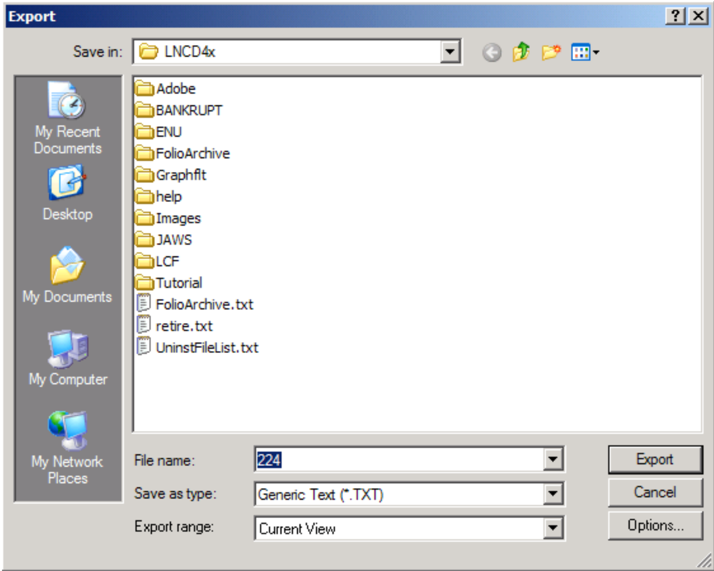
     OR
   - While holding down the left mouse button, drag the mouse until the cursor is positioned at the end of the desired content, then release the mouse button.

     OR
   - Press and hold the SHIFT key, click at the end of the desired content, then release the SHIFT key.

   The desired content is highlighted.

   > ***Tip:*** If the content that you want to export is contained in a single paragraph, you need only click anywhere within that paragraph. Note, however, that if the paragraph is part of a record containing paragraphs in addition to the selected paragraph, all paragraphs in the record will be exported.

Figure 10-7 Export dialog box



4 From the **File** menu choose **Export**.

The Export dialog box opens (see Figure 10-7).

5 In the corresponding areas of the dialog box, navigate to the drive and directory in which you want to store the export file, as applicable.

6 In the **File Name** field, type the desired name for the export file.

7 In the **Save as Type** field, choose the desired format for the export file.

8 In the **Export Range** field choose **Selected Records**.

9 Activate the **Export** button.

The selected publication content is exported in the designated format.

▸ To export content of selected divisions in the active publication

1 Open the desired publication (see "Opening a Publication," on page 10).

2 In the table of contents, expand the hierarchy until the desired divisions are displayed, then click the check box corresponding

to the entry for each desired division until a checkmark appears.

3 From the **File** menu choose **Export**.

The Export dialog box opens (refer to Figure 10-7, on page 115).

4 In the corresponding areas of the dialog box, navigate to the drive and directory in which you want to store the exported file, as applicable.

5 In the **File Name** field type the desired name for the export file.

6 In the **Save as Type** field, choose the desired format for the export file.

7 In the **Export Range** field choose **Checked Branches.**

8 Activate the **Export** button.

The content of the selected divisions is exported in the designated format.

> ***Tip:*** You can also export content of selected divisions by modifying the above procedure in the following manner:
>
> **1.** Following step 2, click anywhere in the Document pane then activate the **View** menu and choose **Checked Branches**.
>
> **2.** At step 7, choose **Current View**.

▸ To export all tagged content in the active publication

1 Open the desired publication (see “Opening a Publication,” on page 10).

2 Tag desired content in the active publication (see “To tag publication content,” on page 128).

3 From the **File** menu choose **Export**.

The Export dialog box opens (refer to Figure 10-7, on page 115).

4 In the corresponding areas of the dialog box, navigate to the drive and directory in which you want to store the exported file, as applicable.

5 In the **File Name** field type the desired name for the export file.

6 In the **Save as Type** field choose the desired format for the export file.

7 In the **Export Range** field choose **Tagged Records.**

8 Activate the **Export** button.

The tagged content is exported in the designated format.

> ***Tip:*** You can also export content of selected divisions by modifying the above procedure in the following manner:
>
> **1.** Following step 2, place the focus anywhere in the Document pane then activate the **View** menu and choose **Tagged Records**.
>
> **2.** At step 7, choose **Current View**.

▸ To export only content containing hits

1 Open the desired publication (see "Opening a Publication," on page 10).

2 Run a search of the publication.

3 Position your cursor anywhere in the Document pane.

4 From the **View** menu choose **Records with Hits.**

5 From the **File** menu choose **Export.**

The Export dialog box opens (refer to Figure 10-7, on page 115).

6 In the corresponding areas of the dialog box, navigate to the drive and directory in which you want to store the exported file, as applicable.

7 In the **File Name** field type the desired name for the export file.

8 In the **Save as Type** field choose the desired format for the export file.

9 In the **Export Range** field choose **Current View.**

10 Activate the **Export** button.

The content containing hits is exported in the designated format.

Chapter 11 Checking the Current Status of Information

The *LexisNexis® CD* application provides easy access to the *Shepard's®* Citations Service on the *lexis.com®* research system, enabling *Shepard's* subscribers to supplement their research efforts.

Checking the current status of information requires an understanding of the following:

- The *Shepard's* Citations Service
- Means of checking a citation

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

The *Shepard's* Citations Service

The *Shepard's* Citations Service provides the tools you need to determine the usefulness and validity of legal documents for your research and to find additional supportive documents. This service combines *Shepard's* thorough information and analysis with the speed and ease of electronic legal research. With *Shepard's* Citations Service, you can simultaneously search the bound case volumes and supplements of *Shepard's* citation products for citations reported in Federal, State, and National Reporter System publications.

You can use the *Shepard's* Citations Service to find parallel citations, a case's history, citations to a case, editorial analysis of a case, treatment of a case, and citations from law reviews, bar journals, annotations, and legal treatises.

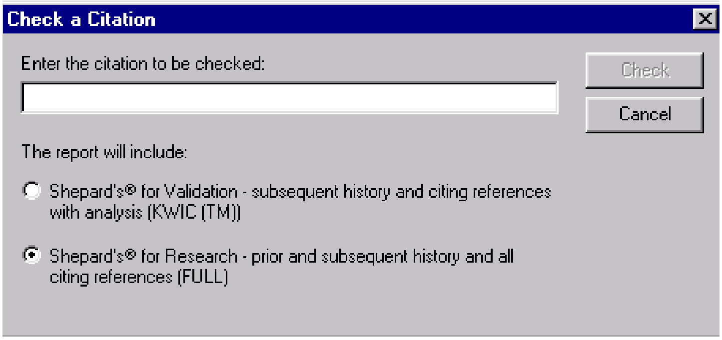
Checking a Citation

You can check a citation at anytime while using the *LexisNexis® CD* application.

▸ To check a citation

1 Open the Check a Citation dialog box in one of the following manners:

Figure 11-1 Check a Citation dialog box



- Press SHIFT + K.

  OR

- From the **LexisNexis** menu choose **Check a Citation**.

  OR

- In the main window activate  .

2 In the text field (see Figure 11-1), type the citation for a case.

3 Enable the option corresponding to the type of report that you want to receive.

SHEPARD'S® for Validation — To limit your results to subsequent appellate history and those citing references that have editorial analysis or that were added within the most recent two months.

SHEPARD'S® for Research — To perform a more comprehensive legal research. The FULL format provides prior history and subsequent appellate history, as well as all citing references from cases, statutes, law reviews and periodicals, and other secondary sources.

4 Press ENTER or activate the **Check** button.

One of the following happens:

- If you have not previously set the *lexis.com*® service to remember your sign-on information, your browser opens to the *lexis.com* Sign On page. Proceed to step 5.

  OR

- If you have previously set the *lexis.com* service to remember your sign-on information, your browser opens to the *Shepard's* Citations Service on the *lexis.com* legal research system, where the results of your citation check are displayed. Proceed to step 7.

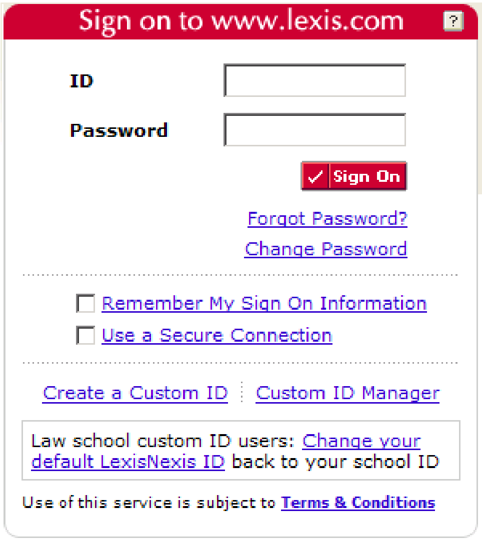
5 In the *lexis.com* Sign On dialog (see Figure 11-2), type your **LexisNexis ID** and your **Password** in the corresponding fields.

> ***Note:*** If you want to use a secure connection or want the system to remember your sign-on information in the future, activate the corresponding check boxes to enable these options. Note that if you elect to have the system remember your sign-on information, the Sign On page will not be displayed the next time you check a citation.

6 Activate the **Sign On** button.

The results of your citation check are displayed in the browser window.

Figure 11-2 The *lexis.com* Sign On dialog



7 When you are finished reviewing the results of your citation check, sign off and close the browser window for the *Shepard's* Citations Service on the *lexis.com* legal research system.

The *LexisNexis CD* main window is again revealed.

Chapter 12 Linking to the *lexis.com*® Service

The *LexisNexis*® *CD* application provides easy access to the *lexis.com* service, a powerful online research system offering subscribers case-finding and analysis tools including the following:

- ***LEXIS*® *Search Advisor* —** Designed to help you begin your online research, LEXIS Search Advisor enables you to create effective searches by selecting terms from a hierarchy of law and related legal topics. As soon as a case is added online, LEXIS Search Advisor can retrieve it.
- ***Core Terms* —** Originally introduced as an analysis tool, Core Terms provide a quick summary of key terms and facts drawn from a case. Unlike conventional headnotes, which focus only on legal issues, Searchable Core Terms enable you to search both points of fact and law.
- ***Case Summaries and LexisNexis*® *Headnotes (Core Concepts)* —** To assist you in analyzing critical information, Case Summaries and LexisNexis Headnotes (Core Concepts) contain exclusive editorial summary content. Case Summaries are written by a team of legal editorial experts to give you a quick, concise understanding of the case's impact and relevance. Case Summaries and LexisNexis Headnotes (Core Concepts) link to relevant sections within a case, to other relevant documents, and to the LEXIS Search Advisor.

You can access the *lexis.com* service directly from the main window of the *LexisNexis CD* application, making it convenient for you to review relevant reference material as part of your work flow.

> ***Note:*** The *lexis.com* research system is a separate service to which you must sign on with the appropriate ID and password as you normally would when accessing that service directly. Note, however, that the *lexis.com* research system does offer you the option of remembering your sign-on information.

> ***Tip:*** The *LexisNexis CD* application provides another feature related to the *lexis.com* service. After you run a search of a case publication, the *LexisNexis CD* application allows you to rerun the same search on the *lexis.com* online research service. In this way, you can search any cases that may have been added to the corresponding publication since the most recent CD release. For further details, see “Searching Updated Case Content on the lexis.com Service,” on page 81.)

To link to the *lexis.com* service

1 Either activate the **LexisNexis** menu then choose **www.lexisnexis.com** or activate ***lexis.com***® in the string of command buttons located in the upper-right portion of the *LexisNexis CD* main window (see Figure 12-1).

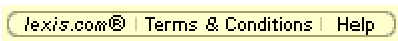
One of the following happens:

- If you have not previously set the *lexis.com* service to remember your sign-on information, your browser opens to the *lexis.com* Sign On page. Proceed to step 2.

OR

- If you have previously set the *lexis.com* service to remember your sign-on information, your browser opens to *lexis.com* home page. Proceed to step 4.

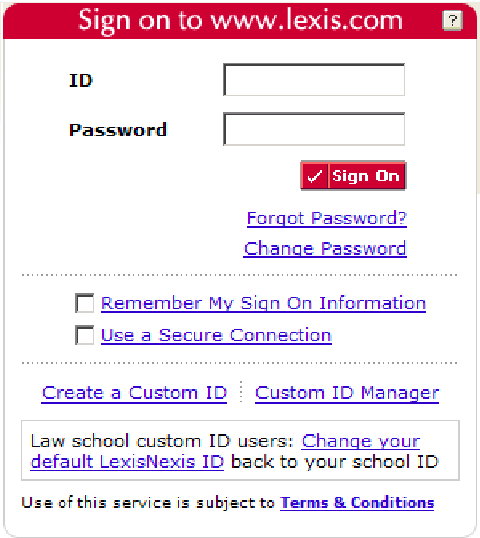
Figure 12-1 *lexis.com*® button



2 In the *lexis.com* Sign On dialog (see Figure 12-2), type your **LexisNexis or Custom ID** and your **Password** in the corresponding fields.

> ***Note:*** If you want to use a secure connection or want the system to remember your sign-on information in the future, click the corresponding check boxes to enable these options. Note that if you elect to have the system remember your sign-on information, the Sign On page will not be displayed the next time you access the *lexis.com* service.

Figure 12-2 The *lexis.com* Sign On dialog



3 Activate the **Sign On** button.

4 Navigate the *lexis.com* service using the procedures that you normally follow.

5 When you are finished, sign off and close the browser window for the *lexis.com* service.

The *LexisNexis CD* main window is again revealed.

Chapter 13 Customizing Publication Content

When you subscribe to one or more products on the *LexisNexis® CD* application, the corresponding content is provided in read-only format, meaning that you can view but cannot modify the content in any way.

You can, however, flag certain portions of publication content. This feature, called tagging, helps you to quickly find content of interest and allows you to view, export, and/or print only that content.

The *LexisNexis CD* application also allows you to copy publications as shadow files and then customize those files in the following ways:

- Attach notes
- Insert bookmarks
- Highlight content

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Tagging Content

The tagging feature of the *LexisNexis CD* application allows you to flag desired portions of read-only publications. In this way, you can readily find content of interest as well as view, export, and/or print only that content.

> ***Tip:*** You can also tag content in shadow files. For information on working with shadow files, see the discussion beginning under "Creating and Opening Shadow Files," on page 129.

Note that when you tag content, the entire record is tagged; thus, if you want to tag a given paragraph that is part of a record containing one or more other paragraphs, all paragraphs will be tagged together as a single unit. Tagged content is indicated by a vertical red line in the left-hand margin, with a tag icon at the top of the line representing the beginning of the corresponding record.

> ***IMPORTANT!*** Regardless of whether you are working in a read-only publication file or a shadow file, tagging remains in effect only as long as the publication remains open. If you tag content and then close and reopen the corresponding publication, the tagging will be gone. If you wish to differentiate publication content so that you can readily find it from session to session, you may want to instead create a shadow file of the publication and then customize that file using notes, bookmarks, and/or highlighting. For further information, see the discussion beginning under "Creating and Opening Shadow Files," on page 129.

> ***Note:*** For instructions related to printing tagged content, see the related topic on page 103.

▸ To tag publication content

1. Open the desired publication (see "Opening a Publication," on page 10).
2. In the Document pane, click anywhere within the content that you want to tag.
3. Tag the content in one of the following ways:
   - Press **CTRL + T**.

     OR
   - From the **Edit** menu choose **Tag Record**.

     OR
   - In the main toolbar activate .

   A vertical red line appears in the left-hand margin beside the tagged content.

   > ***Note:*** When you tag content, the entire record is tagged; thus, if you want to tag a given paragraph that is part of a record containing one or more other paragraphs, all paragraphs will be tagged together as a single unit.

▸ To view only tagged content

1. Open the publication containing the tagged content (see "Opening a Publication," on page 10).
2. Position your cursor anywhere in the Document pane.

3 From the **View** menu choose **Tagged Records**.

The Document pane displays only content that you have tagged.

> ***Tip:*** To revert to viewing the entire contents of the publication, activate the **View** menu then choose **All Records**.

▸ To clear all tags

1 Open the publication containing the tagged content (see "Opening a Publication," on page 10).

2 Position your cursor anywhere in the Document pane.

3 From the **Edit** menu choose **Clear All Tags.**

The tags are removed from the publication content displayed in the Document pane.

Creating and Opening Shadow Files

A shadow file is a special copy of publication content to which you can post and save notes, bookmarks, and textual enhancement in the form of highlighting. A shadow file is like a transparency placed on top of an original; anything written on the transparency will not alter the original.

> ***IMPORTANT!*** Shadow files are good only for the life of the corresponding publication release; thus, once you receive an updated publication release, you will not be able to use a shadow file created from the previous release.

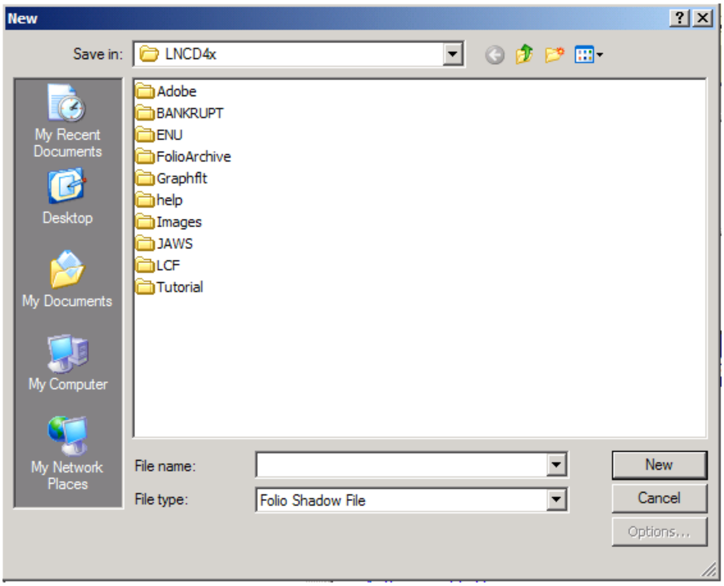
▸ To create a shadow file

1 Open the publication for which you want to create a shadow file (see "Opening a Publication," on page 10).

2 From the **File** menu choose **New.**

The New dialog box appears (see Figure 13-1).

Figure 13-1 New dialog box



3 In the **File Name** field, type the desired name for the shadow file.

> ***Tip:*** You can use the same file name as that for the original publication assuming that you use the .SDW file extension.

4 Verify that the **File Type** field displays **Folio Shadow File**.

5 In the corresponding areas of the dialog box, navigate to the drive and directory to which you want to save the shadow file, as applicable.

6 Activate the **New** button.

The shadow file is created and displayed, as indicated by the word *Shadow* in the title bar of the active window.

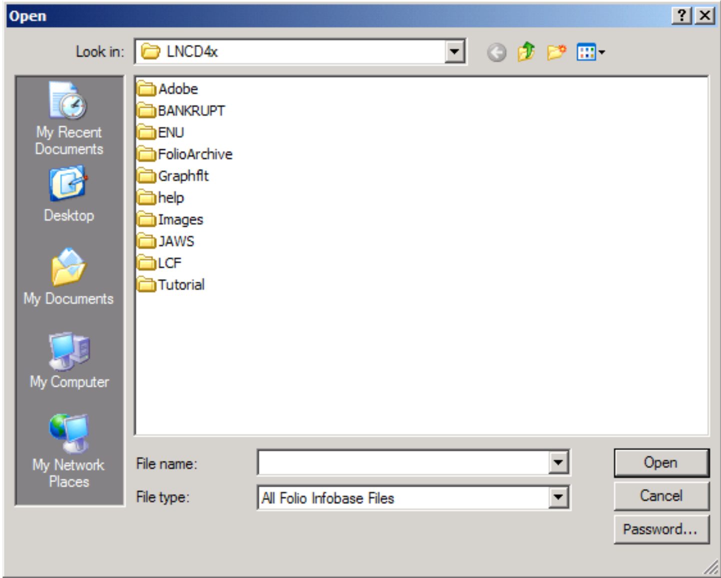
▸ To open an existing shadow file

1 Initiate the process in one of the following manners:

- Press CTRL + O.

OR

Figure 13-2 Open dialog box



- From the **File** menu choose **Open**.

  The Open dialog box appears (see Figure 13-2).

2 In the corresponding areas of the dialog box, navigate to the drive and directory in which the desired shadow file is stored, as applicable.

3 On the list of files:

- Select the name of the desired shadow file, then activate the **Open** button.

  OR

- Double-click the name of the desired shadow file.

> ***Tip:*** Shadow files use the .SDW file extension.

The shadow file is displayed in the *LexisNexis CD* main window.

Annotating Content in Shadow Files

At times, you may want to post commentary to publication content. Using the *LexisNexis CD* Notes feature, not only can you annotate individual paragraphs in shadow files, but you can search the content of those annotations.

> ***IMPORTANT!*** The content of notes can be searched only if you structure your query accordingly. For details, see "Searching a Structural Element (Scope) in One or All Open Publications," on page 67.

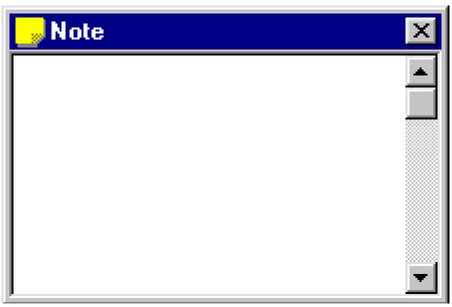
Notes are indicated by a note icon in the left margin of shadow file content displayed in the Document pane.

To create a note

1. Open the applicable shadow file (see "To open an existing shadow file," on page 130).
2. In the Document pane, position the cursor anywhere within the paragraph to which you want to attach the note.
3. Open the Note dialog box in one of the following manners:
   - Press **CTRL + N**.

     OR
   - From the **Tools** menu choose **Note**.
4. In the Note dialog box (see Figure 13-3), type the desired text.

Figure 13-3 Note dialog box



> ***Tip:*** If you want to apply formatting to or include a table, link, or picture in the note, place the focus in the Note dialog box then right-click. Using the pop-up menu that appears, proceed as follows:
>
> - *To apply formatting* to note text, choose **Layout** from the pop-up menu and then click the desired format option from the sub-menu. In the dialog box that opens, set options accordingly, then close the formatting dialog box.
> - *To include a table* in the note, choose **Table** from the pop-up menu, then click **Insert Table** on the sub-menu. In the Insert Table dialog box, set the row, column, and column width values as desired, then click **OK**.
> - *To include a link* in the note, choose **Link** from the pop-up menu, then click the desired linking option from the sub-menu. In the dialog box that opens, provide information accordingly, then close the link dialog box.
> - *To include a picture* in the note, choose **Picture** from the pop-up menu. In the **Name** area of the Picture dialog box, either double-click the name of the desired picture or click the name of the desired picture then click the **Insert** button.

5 When you are done entering the note:

- Press the ESC key.

OR

- Activate the in the upper-right corner of the Note dialog box.

An alert box opens, prompting you to indicate whether you want to save your input.

6 Choose **Yes**.

The alert box and Note dialog box close, and a icon appears in the left margin beside the paragraph to which you attached the note.

▸ To view note contents

From the Document pane, display the note in one of the following manners:

- Position your cursor anywhere within the paragraph to which the note is attached, then press CTRL + N.

OR

- Activate the icon.

The Note dialog box opens, displaying the note's contents.

> ***Tip:*** To close the note when you are done, press the **Esc** key or activate the exit button ( ) in the upper-right corner of the Note dialog box.

To edit a note

1 Open the note (see "To view note contents," on page 133).

The Note dialog box opens (refer to Figure 13-3, on page 132).

2 Edit the note as desired.

> ***Tip:*** If you want to apply formatting to or include a table, link, or picture in the note, refer to the Tip in the procedure entitled "To create a note," beginning on page 132.

3 When you are done editing the note:

- Press the ESC key.

OR

- Activate the in the upper-right corner of the Note dialog box.

An alert box opens, prompting you to indicate whether you want to save your input.

4 Choose **Yes**.

The alert box and Note dialog box close and your edits are saved.

To delete a note

1 In the Document pane, position your cursor anywhere within the paragraph to which you attached the note.

2 Delete the note in one of the following ways:

- Press CTRL + SHIFT + N.

OR

- From the **Tools** menu choose **Remove Note.**

Bookmarking Content in Shadow Files

The bookmarking functionality of the *LexisNexis® CD* application provides you with quick and easy access to key information within a publication shadow file. When you later want to access this information, all you need do is click the corresponding bookmark listing, accessed via the Tools menu. If at some point you find that you no longer need ready access to the information, the *LexisNexis CD* application allows you to easily remove the corresponding bookmark.

IMPORTANT! Bookmarks cannot be searched.

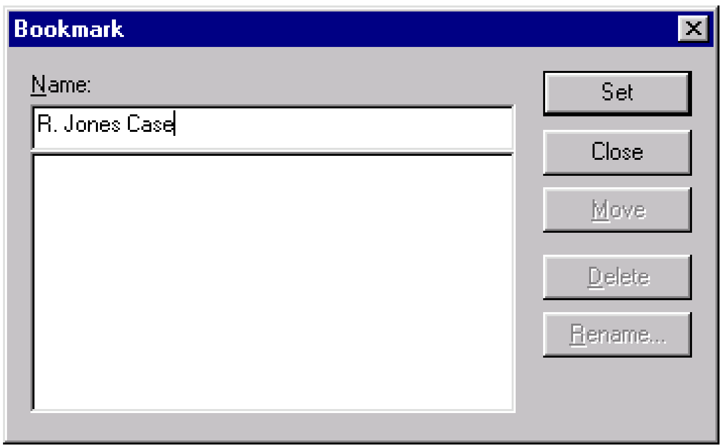
To bookmark content in a shadow file

1. Open the desired shadow file (see "To open an existing shadow file," on page 130).
2. In the Document pane, position your cursor at the location that you want to bookmark.
3. Open the Bookmark dialog box in one of the following ways:
   - Press CTRL + M.

   OR

   - From the **Tools** menu choose **Bookmark.**

Figure 13-4 Bookmark dialog box



4 In the Bookmark dialog (see Figure 13-4), type an identifying **Name** for the bookmark in the corresponding field.

> ***Note:*** The more descriptive the bookmark name, the easier it will be to identify the content flagged by the bookmark. Note that bookmark names can be up to 127 characters in length and that you can include up to 1,000 bookmarks per shadow file.

5 Activate the **Set** button.

The Bookmark dialog box closes and the bookmark is set.

To access bookmarked information

1 Open the applicable shadow file (see "To open an existing shadow file," on page 130).

2 Position your cursor anywhere within the Document pane.

3 From the **Tools** menu choose **Bookmark.**

The Bookmark dialog box opens (refer to Figure 13-4, on page 135).

4 In the list of bookmarks position:

- Position your cursor in the name of the corresponding bookmark, then activate the **Go To** button.

OR

- Double-click the name of the corresponding bookmark.

The Bookmark dialog box closes and the view in the Document pane scrolls to the location of the bookmark.

To delete a bookmark from shadow-file content

1 Open the applicable shadow file (see "To open an existing shadow file," on page 130).

2 Position your cursor anywhere within the Document pane.

3 From the **Tools** menu choose **Bookmark.**

The Bookmark dialog box opens (refer to Figure 13-4, on page 135).

4 Place the focus on the listing for the bookmark you want to delete.

5 Activate the **Delete** button.

An alert box opens, prompting you to confirm your desire to delete the bookmark.

6 Choose **Yes**.

The alert box closes and the bookmark is deleted.

7 Close the Bookmark dialog box in one of the following manners:

- Activate the **Close** button.

  OR

- Activate the in the upper-right corner of the dialog box.

Highlighting Content in Shadow Files

Just as you can highlight text in a printed book, the *LexisNexis® CD* application allows you to visually enhance text in a shadow file for purposes of calling attention to that text. Further, by requiring you to name the different highlighting schemes that you create, the program provides for searching of highlighted content based on the corresponding highlighter name.

> ***IMPORTANT!*** Highlighters can be searched only if you structure your query accordingly. For details, see “Searching a Structural Element (Scope) in One or All Open Publications,” on page 67.

> ***Note:*** Highlighters are shadow-file specific; if you create a highlighter for one shadow file, that highlighter will not be available if you open another shadow file.

▸ To create a highlighter for a shadow file

1 Open the desired shadow file (see “To open an existing shadow file,” on page 130).

2 Position your cursor anywhere within the Document pane.

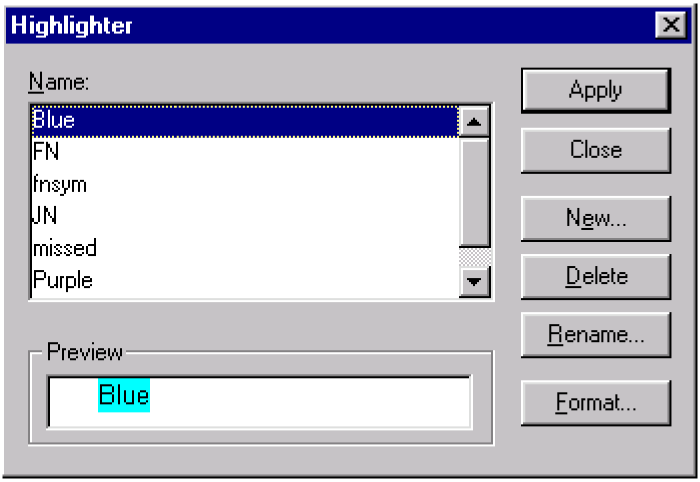
3 Open the Highlighter dialog box in one of the following manners:

- Press CTRL + H.

  OR

- From the **Tools** menu choose **Highlighter.**

Figure 13-5 Highlighter dialog box



4 In the Highlighter dialog box (see Figure 13-5) activate the **New** button.

The New Highlighter dialog box opens (see Figure 13-6).

5 In the **Name** field, type the desired name for the highlighter.

6 From the **Background Color** list, choose the desired color option.

7 Activate the **OK** button.

The New Highlighter dialog box closes, again revealing the Highlighter dialog box.

Figure 13-6 New Highlighter dialog box

8 Set desired text formatting for the highlighter or exit the Highlighter dialog box, as desired:

- To set desired text formatting for the highlighter, activate the **Format** button. The Highlighter Format dialog box opens. Proceed to step 9.

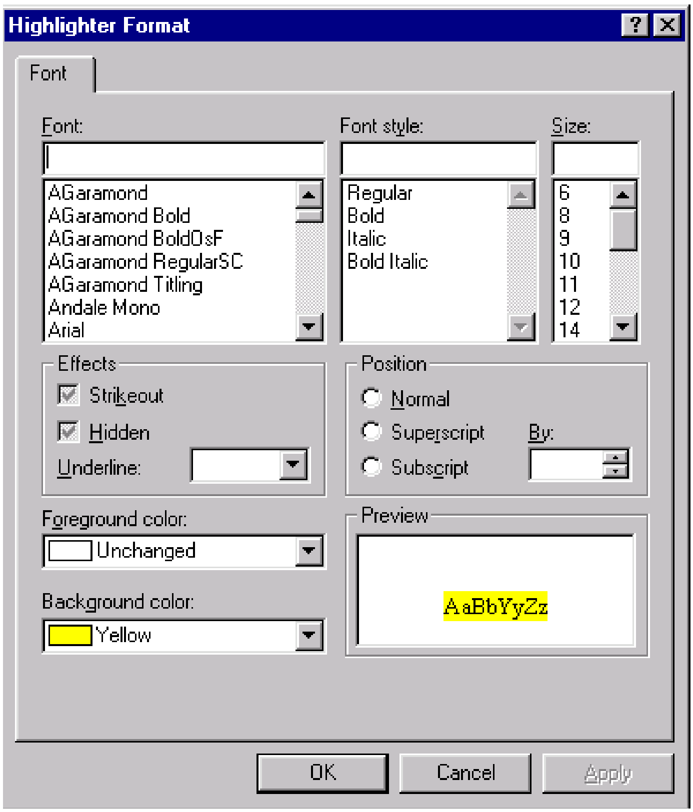
  OR

- To exit the Highlighter dialog box, proceed to step 10.

9 In the Highlighter Format dialog box (see Figure 13-7), indicate desired text formatting options, then activate the **OK** button.

The Highlighter Format dialog box closes, again revealing the Highlighter dialog box.

Figure 13-7 Highlighter Format dialog box



10 Exit the Highlighter dialog box in one of the following manners:

- Activate the **Close** button.

  OR

- Activate the in the upper-right corner of the dialog box.

To apply a highlighter to shadow-file content

1 Open the applicable shadow file (see "To open an existing shadow file," on page 130).

2 In the Document pane, position your cursor at the beginning of the content to which you want to apply the highlighter.

3 Select the desired content in one of the following ways:

- Press and hold the SHIFT key, press and hold the RIGHT ARROW key until the desired content is selected, then release the SHIFT and RIGHT ARROW keys.

  OR

- While holding down the left mouse button, drag the mouse until the cursor is positioned at the end of the desired content, then release the mouse button.

  OR

- Press and hold the SHIFT key, click at the end of the desired content, then release the SHIFT key.

The desired content is selected.

4 Open the Highlighter dialog box in one of the following manners:

- Press CTRL + H.

  OR

- From the **Tools** menu choose **Highlighter**.

5 On the list of highlighters in the Highlighter dialog box (refer to Figure 13-5, on page 138):

- Select the name of the desired highlighter, then activate the **Apply** button.

  OR

- Double-click the name of the desired highlighter.

The Highlighter dialog box closes, and the selected text is enhanced as defined by the chosen highlighter.

‣ To remove highlighting from shadow-file content

1 Open the applicable shadow file (see “To open an existing shadow file,” on page 130).

2 In the Document pane, position your cursor at the beginning of the content from which you want to remove the highlighter.

3 Use one of the following methods to select the balance of the content from which you want to remove the highlighting:

- Press and hold the SHIFT key, press and hold the RIGHT ARROW key until the desired content is selected, then release the SHIFT and RIGHT ARROW keys.

  OR

- While holding down the left mouse button, drag the mouse until the cursor is positioned at the end of the desired content, then release the mouse button.

  OR

- Press and hold the SHIFT key, click at the end of the desired content, then release the SHIFT key.

The desired content is selected.

4 From the **Tools** menu choose **Remove Highlighter**.

The highlighting is removed.

‣ To delete a highlighting scheme from a shadow file

1 Open the applicable shadow file (see “To open an existing shadow file,” on page 130).

2 Position your cursor anywhere within the Document pane.

3 Open the Highlighter dialog box in one of the following manners:

- Press CTRL + H.

  OR

- From the **Tools** menu choose **Highlighter.**

4 On the list of highlighters in the Highlighter dialog box (refer to Figure 13-5, on page 138) select the name of the highlighter that you want to delete.

5 Activate the **Delete** button.

An alert box opens, prompting you to confirm your desire to delete the highlighter.

6 Choose **Yes**.

The alert box closes and the highlighter is deleted from the shadow file.

> ***Note:*** If the deleted highlighter had previously been applied to any text in the shadow file, that text will no longer be highlighted.

7 Exit the Highlighter dialog box in one of the following manners:

- Activate the **Close** button.

OR

- Activate the  in the upper-right corner of the dialog box.

Chapter 14 Managing Data, Rights, and Peripheral-Software Integration

The *LexisNexis® CD* application provides for significant flexibility in administering the program to best suit the circumstances of your work environment over time. Specifically, the application comes equipped with support utilities allowing you to manage data, access rights, and peripheral-software integration.

This chapter provides instructions for performing each of these administrative tasks.

Managing Library Data

Because your electronic data storage and retrieval needs may change over time, the *LexisNexis CD* application comes equipped with a tool allowing you to administer library data. Specifically, the Data Manager utility lets you copy installed libraries from CD to a local or network drive, move copied libraries from one location on a local or network drive to another, and delete copied libraries when you no longer need those copies. Once you have moved or copied a library, you can also set the *LexisNexis CD* application to look for the library in the new location.

> ***Note:*** Data Manager is available only to standalone users and those network users set up as Administrator. Client users do not have access to Data Manager.

To access Data Manager

1 Open the **Start** menu in one of the following manners:

- Press the WINDOWS LOGO key.

  OR

- Press CTRL + ESC.

  OR

- Activate the **Start** button, located on the taskbar in the lower-left corner of your Windows desktop.

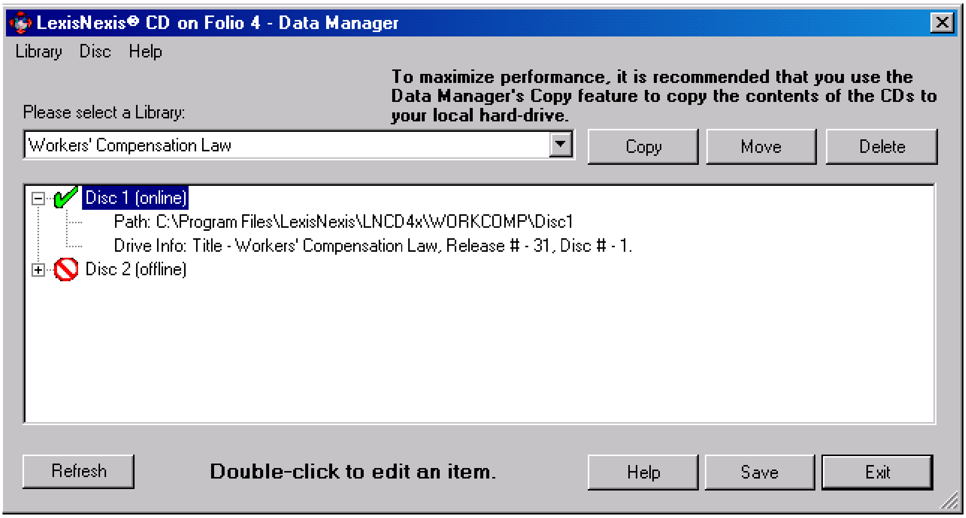
2 On the Start menu choose **Programs**.

3 On the Programs menu choose **LexisNexis CD on Folio 4**.

4 On the LexisNexis CD on Folio 4 menu choose **Data Manager.**

Data Manager opens (see Figure 14-1).

Figure 14-1 Data Manager



Copying a Library from CD

Data Manager allows you to copy installed libraries from CD to a local hard drive or a network location. Copying a library from CD to a local hard drive helps maximize program performance. In a network environment, copying a library to a file server affords multiple users shared access to library data.

▸ To copy a single-disc library

1 Insert the library CD into your computer's CD-ROM drive.

2 Open Data Manager as outlined under "To access Data Manager," on page 143.

3 Choose the desired library from the **Please Select a Library** drop-down field (refer to Figure 14-1, on page 144).

The pane below the drop-down field lists the disc comprising the selected library.

> ***Note:*** The disc Path and Drive Info (i.e., path contents) are detailed under each main disc listing. If these specifics are not displayed, click the plus sign ( ) beside the main disc listing to expand the tree.

> ***IMPORTANT!*** A green checkmark ( ) beside a main disc listing indicates that the disc content is available (i.e., “online”) in the path indicated within the tree. A red circle with a line through it ( ) beside a main disc listing indicates that the disc content is not available (i.e., “offline”) in the path indicated within the tree (for example, when your computer has only one CD-ROM drive and the disc is not currently in the drive).

4 Activate the **Copy** button.

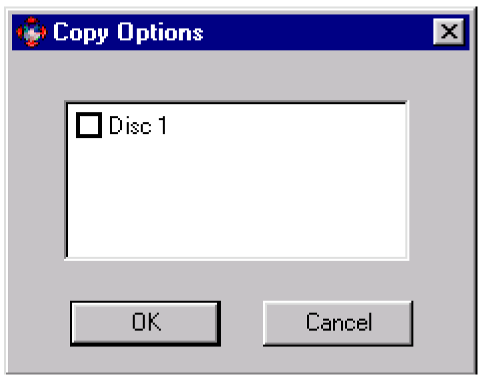
The Copy Options dialog box opens (see Figure 14-2).

5 Select the library disc by activating the check box beside the disc listing and inserting a checkmark.

6 Activate the **OK** button.

The Browse for Folder dialog box opens.

Figure 14-2 Copy dialog box



7 In the Browse for Folder dialog box, browse to the desired target path for the library copy.

> ***IMPORTANT!*** The target path needn't include library- or disc-specific subdirectories; Data Manager will automatically append the path so that it includes subdirectories specific to the library and disc(s) in question. For example, if you were copying the Bankruptcy library and browsed to a target path of **C:\LexisNexisCD\Data**, Data Manager will add library- and disc-specific subdirectories such as **\Bankrupt\ Disk1**, making the final path **C:\LexisNexisCD\Data\Bankrupt\Disk1**.

8 In the Browse for Folder dialog box, activate the **OK** button.

A Copying meter appears, indicating the progress of the copying process. When the meter closes, a message box appears, indicating that the library was successfully copied.

9 Activate the **OK** button to close the message box.

Data Manager is fully revealed, and the disc listing is updated to reflect the path to which the disc contents were copied.

10 Activate the **Save** button in Data Manager.

A message box opens, informing you that your changes have been saved.

11 Activate the **OK** button to close the message box.

12 Close Data Manager or perform additional data-management tasks, as applicable:

- To close Data Manager, activate the **Exit** button.

OR

- To perform additional data-management tasks, follow the steps under the procedure for the given task(s).

▸ To copy a multi-disc library

1 Insert the first library CD into your computer's CD-ROM drive.

2 Open Data Manager as outlined under "To access Data Manager," on page 143.

3 Choose the desired library from the **Please Select a Library** drop-down field (refer to Figure 14-1, on page 144).

The pane below the drop-down field lists the discs comprising the selected library.

> ***Note:*** The disc Path and Drive Info (i.e., path contents) are detailed under each main disc listing. If these specifics are not displayed, click the plus sign (⊞) beside the main disc listing to expand the tree.

> ***IMPORTANT!*** A green checkmark (✔) beside a main disc listing indicates that the disc content is available (i.e., "online") in the path indicated within the tree. A red circle with a line through it (🛇) beside a main disc listing indicates that the disc content is not available (i.e., "offline") in the path indicated within the tree (for example, when your computer has only one CD-ROM drive and the disc is not currently in the drive).

4 Activate the **Copy** button.

The Copy Options dialog box opens (refer to Figure 14-2, on page 145).

5 For each disc that you want to copy, click the corresponding check box to insert a checkmark.

6 Activate the **OK** button.

The Browse for Folder dialog box opens.

7 In the Browse for Folder dialog box, browse to the desired target path for the library copy.

> ***IMPORTANT!*** The target path needn't include library- or disc-specific subdirectories; Data Manager will automatically append the path so that it includes subdirectories specific to the library and disc(s) in question. For example, if you were copying the Bankruptcy library and browsed to a target path of **C:\LexisNexisCD\Data**, Data Manager will add library- and disc-specific subdirectories such as **\Bankrupt\ Disk1**, making the final path **C:\LexisNexisCD\Data\Bankrupt\Disk1**.

8 In the Browse for Folder dialog box, activate the **OK** button.

- If the disc noted in the Browse for Folder dialog box is the last disc in the library, a Copying meter appears, indicating the progress of the copying process. When the meter closes, a message box appears, informing you to insert the next disc. Proceed to step 9.

OR

- If the disc noted in the Browse for Folder dialog box is not the last disc in the library, a Browse for Folder dialog box opens for the next disc in the library. Repeat steps 7 and 8.

9 Remove the just-copied disc from the CD-ROM drive and insert the next disc to be copied.

10 Activate the **OK** button to close the message box.

A Copying meter appears, indicating the progress of the copying process. When the meter closes, one of the following happens:

- If the disc currently in the CD-ROM drive is the last disc in the multi-disc set, a message box appears, indicating that the library was successfully copied. Proceed to step 11.

OR

- If the disc currently in the CD-ROM drive is not the last disc in the multi-disc set, a message box appears, informing you to insert the next disc. Repeat steps 9 and 10.

> ***Note:*** If you elect to halt the copying process by activating the Cancel button, all files associated with the disc currently in the CD-ROM drive are removed from the target location. All files associated with any disc copied earlier in the copying process, however, are left in place in the target location. Therefore, if you subsequently want to complete the process of copying the entire library, you need select for copying (at step 5, above) only the disc on which you initially halted the copying process along with any subsequent discs in the multi-disc set.

11 Activate the **OK** button to close the message box.

Data Manager is fully revealed, and the disc listings are updated to reflect the path to which the disc contents were copied.

12 Activate the **Save** button in Data Manager.

A message box opens, informing you that your changes have been saved.

13 Activate the **OK** button to close the message box.

14 Close Data Manager or perform additional data-management tasks, as applicable:

- To close Data Manager, activate the **Exit** button.

  OR

- To perform additional data-management tasks, follow the steps under the procedure for the given task(s).

Moving a Library Copy

Once you have copied a library, Data Manager allows you to move that copy. When you do so, the entire library is moved to a single location.

▸ To move a library copy

1 Open Data Manager as outlined under "To access Data Manager," on page 143.

2 Choose the desired library from the **Please Select a Library** drop-down field (refer to Figure 14-1, on page 144).

The pane below the drop-down field lists the disc comprising the selected library.

> ***Note:*** The disc Path and Drive Info (i.e., path contents) are detailed under each main disc listing. If these specifics are not displayed, click the plus sign (⊞) beside the main disc listing to expand the tree.

> ***IMPORTANT!*** A green checkmark ( ) beside a main disc listing indicates that the disc content is available (i.e., "online") in the path indicated within the tree. A red circle with a line through it ( ) beside a main disc listing indicates that the disc content is not available (i.e., "offline") in the path indicated within the tree (for example, when your computer has only one CD-ROM drive and the disc is not currently in the drive).

3 Activate the **Move** button.

A dialog box opens, informing you that the previously copied discs will be moved to a common directory.

4 Choose **Yes** to proceed with the move.

> ***Tip:*** To instead terminate the process without moving the library copy, click **No**.

The Browse for Folder dialog box opens.

5 In the Browse for Folder dialog box, browse to the path to which you want to move the library copy.

> ***IMPORTANT!*** The target path needn't include library- or disc-specific subdirectories; Data Manager will automatically append the path so that it includes subdirectories specific to the library and disc(s) in question. For example, if you were moving a copy of the Bankruptcy library and browsed to a target path of **C:\LexisNexisCD\Data**, Data Manager will add library- and disc-specific subdirectories such as **\Bankrupt\ Disk1**, making the final path **C:\LexisNexisCD\Data\Bankrupt\Disk1**.

6 In the Browse for Folder dialog box, activate the **OK** button.

A message box appears, informing you that the library was successfully moved.

7 Activate the **OK** button to close the message box.

Data Manager is fully revealed, with the disc listing(s) reflecting the path to which the library copy was moved.

8 Activate the **Save** button in Data Manager.

A message box opens, informing you that your changes have been saved.

9 Activate the **OK** button to close the message box.

10 Close Data Manager or perform additional data-management tasks, as applicable:

- To close Data Manager, activate the **Exit** button.

  OR

- To perform additional data-management tasks, follow the steps under the procedure for the given task(s).

Deleting a Library Copy

Because your work environment may change over time necessitating removal of certain data from your system, Data Manager allows you to delete any library that you copied to a local drive or network location.

> ***IMPORTANT!*** Built-in safeguards prevent you from deleting the library originals from CD. Note that once you have deleted a library copy, you cannot retrieve the copy and you must then use the Edit Path feature of Data Manager to indicate the valid location of the library (see "Editing the Path of a Library," on page 152).

▸ To delete a library copy

1 Open Data Manager as outlined under "To access Data Manager," on page 143.

2 Choose the desired library from the **Please Select a Library** drop-down field (refer to Figure 14-1, on page 144).

The pane below the drop-down field lists the disc(s) comprising the selected library.

> ***Note:*** The disc Path and Drive Info (i.e., path contents) are detailed under each main disc listing. If these specifics are not displayed, click the plus sign (⊞) beside the main disc listing to expand the tree.

> ***IMPORTANT!*** A green checkmark ( ) beside a main disc listing indicates that the disc content is available (i.e., "online") in the path indicated within the tree. A red circle with a line through it ( ) beside a main disc listing indicates that the disc content is not available (i.e., "offline") in the path indicated within the tree (for example, when your computer has only one CD-ROM drive and the disc is not currently in the drive).

3 Activate the **Delete** button.

A message is displayed, prompting you to confirm your desire to delete the selected library copy.

4 Choose **Yes** to delete the selected library copy.

> ***IMPORTANT!*** Once you have deleted a library copy, you cannot recover the copy. If you decide that you do not want to delete the library copy, choose **No** in this dialog box. Doing so will cancel the deletion process.

A status box appears, indicating the progress of the deletion process. When the status box closes, a message box appears, informing you that the library copy was successfully deleted and reminding you that you should now use Data Manager to indicate the valid location of the library.

5 Activate the **OK** button to close the message box.

Data Manager is fully revealed, and each disc listing for the library is updated to reflect the red, “offline” symbol ( ) and an unidentified path.

> ***Note:*** Before you will be able to again access the library content, you must use the Edit Path feature of Data Manager to indicate the valid location of the library (see “Editing the Path of a Library,” on page 152).

6 Activate the **Save** button in Data Manager.

A message box opens, informing you that your changes have been saved.

7 Activate the **OK** button to close the message box.

8 Close Data Manager or perform additional data-management tasks, as applicable:

- To close Data Manager, activate the **Exit** button.

  OR

- To perform additional data-management tasks, follow the steps under the procedure for the given task(s).

Editing the Path of a Library

In certain situations, a library may be deleted or moved from its former location. For instance, after copying a library to your local drive, you may need to free up that space and decide to revert to accessing that library data from the CD. In such an instance, you would need to instruct the *LexisNexis CD* application to look for the library on the CD-ROM drive. Data Manager allows for this via its Edit Path feature.

To edit the path of a library

1 Open Data Manager as outlined under "To access Data Manager," on page 143.

2 Choose the desired library from the **Please Select a Library** drop-down field (refer to Figure 14-1, on page 144).

The pane below the drop-down field lists the discs comprising the selected library, with each disc for which the currently indicated path is not valid being indicated by the red, "offline" symbol (🚫).

> ***Note:*** The disc Path and Drive Info (i.e., path contents) are detailed under each main disc listing. If these specifics are not displayed, click the plus sign (⊞) beside the main disc listing to expand the tree.

3 From the tree of the disc for which you want to edit the path, open the Browse for Folder dialog box in one of the following manners:

- Place your cursor in the **Path** line then activate the **Disc** menu and choose **Edit Path**.

OR

- Double-click the **Path** line.

4 Browse to the new file path containing the disc content, then activate the **OK** button.

Data Manager is fully revealed, and the disc listing is updated to reflect the edited path.

> ***Note:*** Assuming that you have edited the path to reflect the proper location of the disc content, the red, "offline" symbol (🚫) will also have changed to the green "online" symbol (✔).

5 Edit the paths of additional discs, as necessary:

- To edit paths of additional discs, repeat steps 3 and 4.

OR

- To continue without editing paths of additional discs, proceed to step 6.

6 Activate the **Save** button in Data Manager.

A message box opens, informing you that your changes have been saved.

7 Activate the **OK** button to close the message box.

8 Close Data Manager or perform additional data-management tasks, as applicable:

- To close Data Manager, activate the **Exit** button.

OR

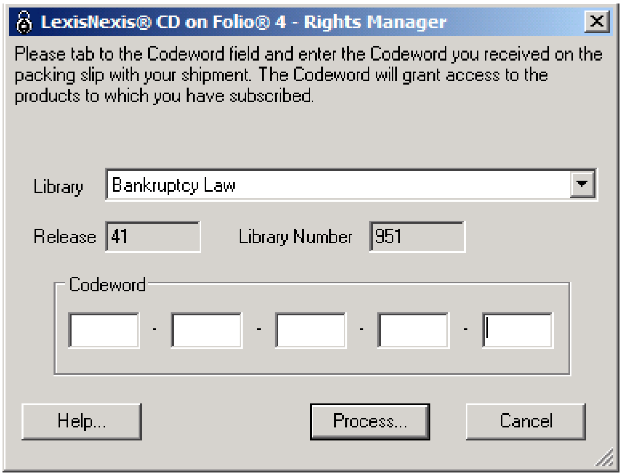
- To perform additional data-management tasks, follow the steps under the procedure for the given task(s).

Managing Library Access Rights

Because your practice may change over time, the *LexisNexis CD* application comes equipped with a tool allowing you to administer library access rights. Specifically, the Rights Manager utility (see Figure 14-3) lets you expand or abridge library access rights should you change your subscription after receiving and installing the latest release of a particular library on CD.

> ***Note:*** Rights Manager is available only to standalone users and those network users set up as Administrator. Client users do not have access to Rights Manager.

Figure 14-3 Rights Manager



▸ To update library access rights

1 Open the **Start** menu in one of the following manners:

- Press the WINDOWS LOGO key.

  OR

- Press CTRL + ESC.

  OR

- Activate the **Start** button, located on the taskbar in the lower-left corner of your Windows desktop.

2 On the Start menu choose **Programs**.

3 On the Programs menu choose **LexisNexis CD on Folio 4**.

4 On the LexisNexis CD on Folio 4 menu choose **Rights Manager**.

Rights Manager opens (refer to Figure 14-3, on page 155).

5 From the **Library** drop-down list, choose the library for which you want to update your subscription.

The selected library is highlighted.

> ***Tip:*** Libraries are listed in alphabetical order.

6 In the **Codeword** text field, type the codeword you received for the selected library.

> ***Note:*** The codeword is a series of 20 characters separated by hyphens. It can be found on the packing slip enclosed with the CD.

> ***Tip:*** Do not type the hyphens between the characters of your codeword because the hyphens already appear as part of the text field.

7 Activate the **Process** button.

Your request is processed and the Products & Publications dialog box opens (see Figure 14-4, on page 157).

> ***Tip:*** The Products & Publications dialog box shows all the products in the library. A folder icon ( ) beside a product title indicates that you have access rights to that product; a red "x" ( ) indicates that you do not have access rights.

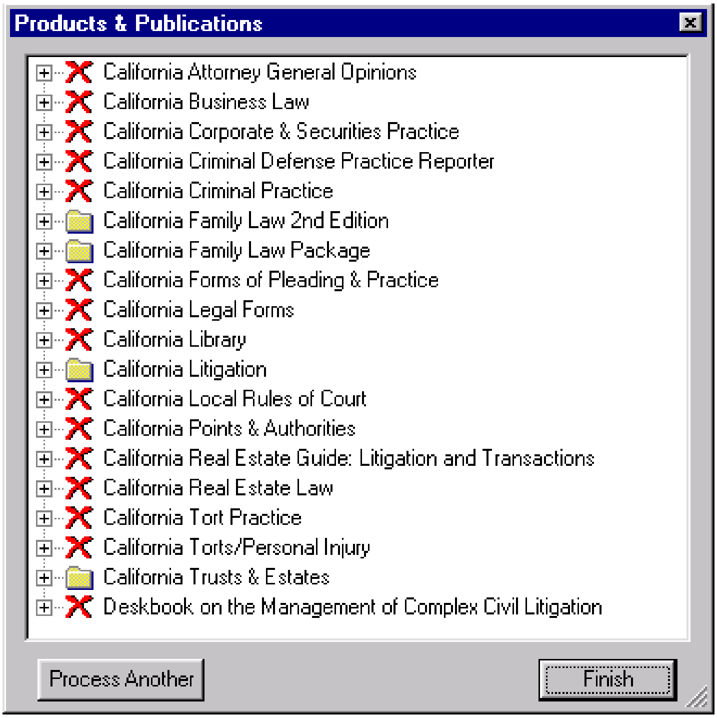
8 Update additional library subscriptions or exit Rights Manager, as desired:

- To update additional library subscriptions, activate the **Process Another** button, then repeat steps 5 through 7.

  OR

- To exit Rights Manager, activate the **Finish** button.

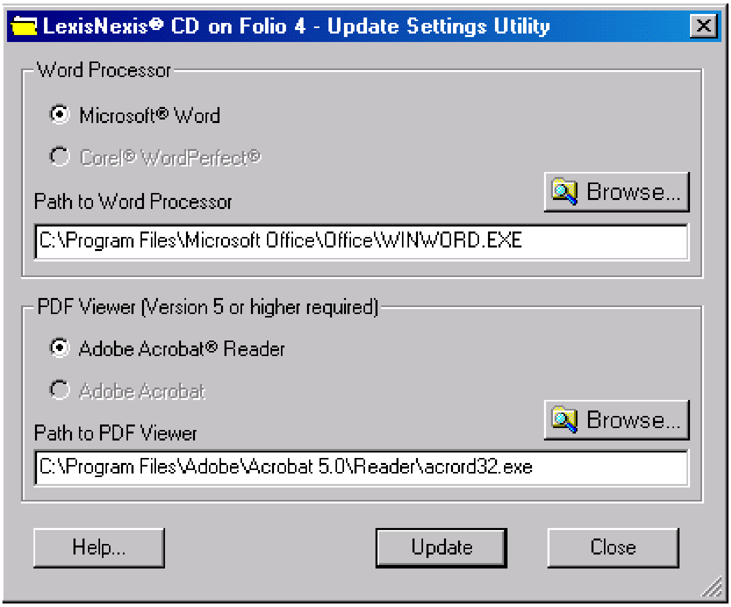
Figure 14-4 Products & Publications dialog box



Managing Peripheral-Software Integration

Because your work environment—particularly, the type and installation location of software applications—may change over time, the *LexisNexis CD* application provides a quick and easy way to alert the program to such changes. A single utility accessed via the Program group allows you to indicate changes in word-processing and PDF-viewer software.

Figure 14-5 Update Settings Utility



▸ To access the Update Settings Utility

1. Open the **Start** menu in one of the following manners:
   - Press the WINDOWS LOGO key.

     OR
   - Press CTRL + ESC.

     OR
   - Activate the **Start** button, located on the taskbar in the lower-left corner of your Windows desktop.
2. On the Start menu choose **Programs.**
3. On the Programs menu choose **LexisNexis CD on Folio 4x.**
4. On the LexisNexis CD on Folio 4x menu choose **Update Settings Utility.**

   The Update Settings Utility opens (refer to Figure 14-5, on page 158).

To update your PDF-viewer information

1 Open the Update Settings Utility as outlined under “To access the Update Settings Utility,” on page 158.

> ***Note:*** If a pdf viewer is already installed on your system, the Path to PDF Viewer field will already be populated.

2 In the **PDF Viewer** area, activate the **Browse** button.

An Open dialog box appears.

3 Browse to the drive and directory to which the desired PDF-viewer software is installed, then select the executable (.exe) file for the software.

4 Activate the **Open** button.

The Open dialog box closes, again revealing the Update Settings Utility now displaying the updated Path to PDF Viewer.

5 Activate the **Update** button.

A Saved Settings dialog box opens, informing you that your change has been saved.

> ***Note:*** If you selected a viewer that doesn’t meet the minimum requirements for ensuring full PDF-viewing functionality, you will instead receive a message box alerting you to this fact and prompting you to indicate whether you want to use the selected PDF viewer. In this case, do one of the following:
>
> - To select another PDF viewer, choose **No** to close the message box and return to the Update Settings Utility, then repeat steps 2 through 5.
> - To use the originally selected PDF viewer, choose **Yes** to close the message box and display the Saved Settings dialog box, then proceed to step 6. In this instance, note that you may not be able to view all PDF documents.

6 In the Saved Settings dialog box, activate the **OK** button.

The dialog box closes, again revealing the Update Settings Utility.

7 Update your word-processing setting or exit the Update Settings Utility, as desired:

- To update your word-processor setting, follow the steps outlined under the corresponding procedure, beginning on page 160.

  OR

- To exit the Update Settings Utility, activate the **Close** button.

To update your word-processor information

1. Open the Update Settings Utility as outlined under "To access the Update Settings Utility," on page 158 .
2. In the **Word Processor** area, activate the **Browse** button.

   An Open dialog box appears.
3. Browse to the drive and directory to which the desired word-processing software is installed, then select the executable (.exe) file for the software.
4. Activate the **Open** button.

   The Open dialog box closes, again revealing the Update Settings Utility now displaying the updated Path to Word Processor.
5. Activate the **Update** button.
6. A Saved Settings dialog box opens, informing you that your change has been saved.
7. In the Saved Settings dialog box, activate the **OK** button.

   The dialog box closes, again revealing the Update Settings Utility.
8. Update your PDF-viewer setting or exit the Update Settings Utility, as desired:
   - To update your PDF-viewer setting, follow the steps outlined under the corresponding procedure, beginning on page 159.

     OR

   - To exit the Update Settings Utility, activate **Close** button.

Appendix A Working with the Program Interface

The program interface refers to what the *LexisNexis*® *CD* application displays on screen and where and how it displays it. Interface elements include things such as program menus, the toolbar, window areas, navigational aids, icons, and display font.

Working with the program interface requires an understanding of the following:

- Program menus
- Main toolbar
- Interface customizing options

This chapter outlines each of these topics and, where applicable, provides instructions for performing the given task.

Understanding the Menus

The *LexisNexis CD* application provides a number of menus containing options of four general types:

- Commands that provide access to a secondary mechanism where you indicate the specifics of carrying out a task and from which you then execute the task, such as the Print command on the File menu
- Commands that directly execute a task, such as the hit navigation commands (i.e., Next Hit, Previous Hit, Next Record Hit, Previous Record Hit) on the Search menu
- Independent settings that can be enabled and disabled regardless of other settings, such as the Show Check Boxes setting on the View menu
- Mutually exclusive settings that when enabled disable any alternative settings, such as the settings to display All Records, Records with Hits, Tagged Records, or Checked Branches on the View menu

> ***Note:*** Whether electing an independent or a mutually exclusive setting, the results are immediately apparent.

Menu availability and form may vary depending on interface mode (i.e., the active part of the interface); option availability on the various menus may vary depending on program mode [i.e., the most recent task performed and/or the file type (read-only or shadow) of the active publication].

> ***Tip:*** Some of the most commonly used commands can also be accessed via the toolbar. For further details, see "Understanding the Main Toolbar," on page 185.

The *LexisNexis CD* menu bar contains the following menus:

- File
- Edit (displayed only when the Document view is active)
- View
- Navigate
- Search
- Layout (displayed only when the Document view is active)
- Tools
- Window
- LexisNexis
- Help

File Menu

The File menu (see Figure A-1) is always displayed.

Menu form varies slightly depending on interface mode, with the Export command being displayed only when the Document or Contents pane is active.

With the exception of the Save command (which is available only when working in a shadow file), all options are always available.

See Table A-1 for a summary of File menu options and corresponding purposes.

Figure A-1 File menu

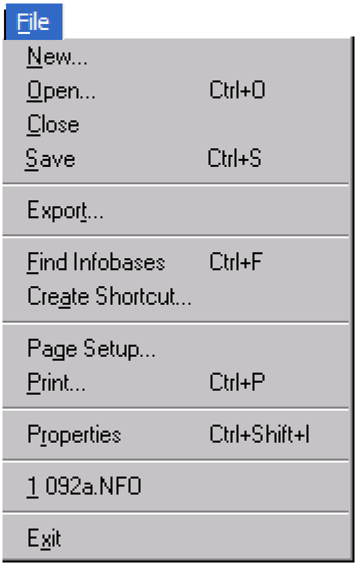


Table A-1 File Menu Summary

Option	Purpose
New	Create a shadow file of the active publication (see “Creating and Opening Shadow Files,” on page 129).
Open	Access an infobase or shadow file.
Close	Exit the active infobase or shadow file.
Save	Accept changes made to a shadow file. *Note:* This command is available only when you are working in a shadow file that you have modified in some way other than by tagging.

Table A-1 File Menu Summary *(Continued)*

Option	Purpose
Export	Save part(s) of the active publication in a format compatible with another application, subject to Terms and Conditions (see “Exporting Content,” on page 113) *Note:* This command is displayed only when the Document or Contents pane is active.
Find Infobases	Perform a full-content search of all publications in a given directory on your computer (see “Searching All Publications in a Given Directory,” on page 72).
Create Shortcut	Set up a short-cut to the active publication.
Page Setup	Set formatting preferences for content to be printed.
Print	Begin the process of printing from the active publication (see “Printing Content,” on page 97).
Properties	View file information for the active infobase.
Exit	Quit the *LexisNexis CD* application (see “Quitting the Program,” on page 23).
List of recently opened infobases (i.e., publications)	Open a recently accessed publication.

Edit Menu

The Edit menu (see Figure A-2) is displayed only when the Document pane is active. Certain menu options are available only when working in a note posted to a shadow file or following given tasks (see Table A-2 for details).

Figure A-2 Edit menu

Table A-2 Edit Menu Summary

Option	Purpose
Copy	Copy selected material from the active publication for purposes of pasting it elsewhere (see “Copying and Pasting Content,” on page 112). *Note:* You can copy content only for purposes of pasting it into a note posted to a shadow file or into a file maintained in another application.
Tag Record	Flag content of interest for purposes of quickly finding relevant material as well as viewing, exporting, and/or printing only that material (see “Tagging Content,” on page 127). *Note:* Tagging remains in effect only as long as the publication remains open. If you tag content and then close and reopen the corresponding publication, the tagging will be gone.
Clear All Tags	Removes all tagging from publication content (see “Tagging Content,” on page 127.)

View Menu

The View menu is always displayed but takes different forms depending on interface mode. Within each form of the View menu, certain options are available only following certain tasks.

View Menu, Document Mode

With the Document pane active, the View menu provides options for the following:

- Varying the type and amount of content displayed in the Document pane
- Refreshing the table of contents
- Adjusting the magnification of content displayed in all panes

Figure A-3 illustrates the View menu in Document mode; Table A-3 summarizes the menu options and corresponding purposes.

Figure A-3 View menu, Document mode

Table A-3 View Menu (Document Mode) Summary

Option	Purpose
Hidden	Display material specific to the production of the active publication. *Note:* By default, this setting is disabled.
Code	Display coding (e.g., hard and soft paragraph returns) in publication content. *Note:* By default, this setting is disabled.
Display Settings	
All Records	Display all publication content. *Note:* This is the default display setting.

Table A-3 View Menu (Document Mode) Summary *(Continued)*

Option	Purpose
Records with Hits	Display only those records containing query matches (see "Limiting Content Displayed After a Search," on page 93). *Note:* A record is defined as either a heading or one or more paragraphs of body text following a heading. Note that this setting is available only following a search.
Tagged Records	Display only flagged publication content (see "Tagging Content," on page 127). *Note:* This setting is available only after you have tagged one or more records.
Checked Branches	Display only that portion of publication content selected in the table of contents (see "Limiting Content Displayed for Viewing," on page 31). *Note:* This setting is available only after you have selected content via the check boxes in the table of contents. Note that if you subsequently deselect all content in the table of contents, nothing will be displayed in the Document pane. To again display content, you must either select one or more entries in the table of contents or elect a different available display setting.
Synchronize Contents	Manually refresh the table of contents to reflect your location in publication content (see "Synchronizing the Table of Contents," on page 32).
Zoom	Adjust the magnification at which text in all panes is displayed, from the default of 100% to a maximum of 500% or a minimum of 10%.

View Menu, Hit List Mode

With the Hit List pane active, the View menu provides options for the following:

- Varying the amount and type of information displayed in the hit list
- Adjusting the magnification of content displayed in all panes.

Figure A-4 illustrates the View menu in Hit List mode; Table A-4 summarizes the menu options and corresponding purposes.

Figure A-4 View menu, Hit List mode

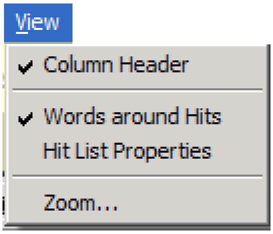


Table A-4 View Menu (Hit List Mode) Summary

Option	Purpose
Column Header	Display or hide the bar containing column descriptor(s) at the top of the Hit List pane. *Note:* By default, this setting is enabled.
Words around Hits	Display or hide hit entries in the hit list. *Note:* By default, this option is enabled and set to display 5 words on either side of a hit. If you disable this option, the hit list will display only record entries. For further details, see "Viewing Search Results Using the Hit List," on page 84. *Tip:* If desired you can change the default Words around Hits value of 5 to a maximum of 50 or a minimum of 1. For details, see "To change the scope of hit entries in the hit list," on page 87.
Hit List Properties	Change the categories of information displayed in the hit list.
Zoom	Adjust the magnification at which text in all panes is displayed, from the default of 100% to a maximum of 500% or a minimum of 10%.

View Menu, Contents Mode

With the Contents pane active, the View menu provides options for the following:

- Expanding or collapsing the table of contents in various increments
- Displaying or hiding selection check boxes in the table of contents
- Negating all selections made via the table of contents
- Adjusting the magnification of content displayed in all panes.

Figure A-5 illustrates the View menu in Contents mode; Table A-5 summarizes the menu options and corresponding purposes.

Figure A-5 View menu, Contents mode

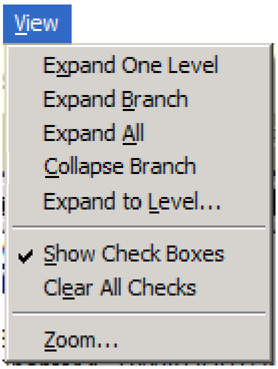


Table A-5 View Menu (Contents Mode) Summary

Option	Purpose
Expand One Level	Display the immediate sublevel of the level currently selected in the table of contents (see “To expand a level in the table of contents to the immediate sublevel,” on page 29).
Expand Branch	Display all sublevels of the level currently selected in the table of contents (see “To collapse a level in the table of contents,” on page 29).

Table A-5 View Menu (Contents Mode) Summary *(Continued)*

Option	Purpose
Expand All	Display all levels in the table of contents (see "To fully expand the table of contents," on page 29).
Collapse Branch	Hide all sublevels of the level currently selected in the table of contents (see "To collapse a level in the table of contents," on page 29). *Note:* This command is available only after you have expanded one or more levels in the table of contents.
Expand to Level	Expand or collapse the table of contents to a specified level. *Tip:* You can fully collapse the table of contents by selecting the upper-most level of the publication (see "To fully collapse the table of contents," on page 29).
Show Check Boxes	Display check boxes in the table of contents for purposes of narrowing a search or limiting the publication content shown in the Document pane (see "To search selected portions of the active publication," on page 65, and "To limit content displayed for viewing," on page 31). *Note:* By default, this setting is enabled.
Clear All Checks	Negate all selections made in the table of contents.
Zoom	Adjust the magnification at which text in all panes is displayed, from the default of 100% to a maximum of 500% or a minimum of 10%.

Navigate Menu

The Navigate menu (see Figure A-6) is always displayed.

Menu form varies slightly depending on interface mode, with the Follow Link, Next Link, Prev Link commands being displayed only when the Document pane is active.

Program mode influences available options, as shown in Table A-7.

Figure A-6 Navigate menu

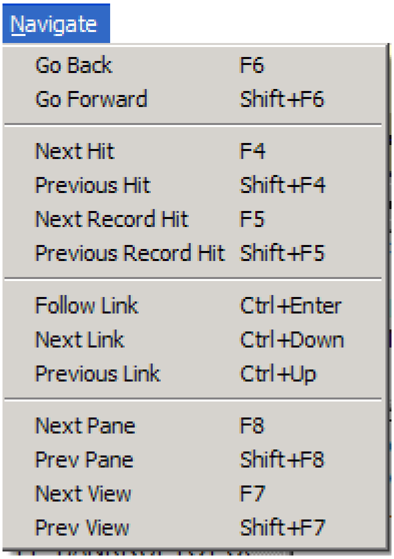


Table A-6 Navigate Menu Summary

Option	Purpose
Go Back	Return to the location from which you linked. *Note:* This command becomes available only after linking within or between publications.
Go Forward	Return to the most recent link destination. *Note:* This command becomes available only after linking within or between publications and returning to the location from which you linked.
Next Hit	Move the focus in the Document pane to the hit that immediately follows the currently highlighted hit in the currently displayed record. *Tip:* If there is no "next hit" within the currently displayed record, activating this button will move the focus to the first hit in the next record containing hits. *Note:* This command becomes available only following a search. If you navigate to the last hit in publication content, the command again becomes unavailable.
Previous Hit	Move the focus in the Document pane to the hit that immediately precedes the currently highlighted hit in the currently displayed record. *Tip:* If there is no "previous hit" within the currently displayed record, activating this button will move the focus to the last hit in the previous record containing hits. *Note:* This command is available only after you have run a search and navigated beyond the first hit in publication content. If you subsequently navigate back to the first hit, the command again becomes unavailable.

Table A-6 Navigate Menu Summary *(Continued)*

Option	Purpose
Next Record Hit	Move the focus in the Document pane to the beginning of the first record that follows the currently displayed record and contains hits. *Note:* This command becomes available only following a search. If you navigate to the last record containing a hit, the command again becomes unavailable.
Previous Record Hit	Move the focus in the Document pane to the beginning of the first record that precedes the currently displayed record and contains hits. *Tip:* If the focus is currently on the first hit in publication content and you execute this command, the focus will move to the beginning of the record containing the first hit. *Note:* This command becomes available only following a search.
Follow Link	Display the content referenced in the link currently in focus. *Note:* This command becomes available only when the focus is in the Document pane and the cursor is positioned just before a link.
Next Link	Move the focus to the next link appearing in the currently displayed record or, if no additional links exist in the currently displayed record, move the focus to the beginning of the next record in document content. *Note:* This command becomes available only when the focus is in the Document pane.
Prev Link	Move the focus to the previous link appearing in the currently displayed record or, if no additional links exist in the currently displayed record, move the focus to the end of the previous record in document content. *Note:* This command becomes available only when the focus is in the Document pane.

Table A-6 Navigate Menu Summary *(Continued)*

Option	Purpose
Next Pane	Move the focus to the next pane in the currently displayed view.
Prev Pane	Move the focus to the previous pane in the currently displayed view.
Next View	Change the display to the next option in the view cycle. *Tip:* The view options in order are All, Search, Browse, Document, Contents, and Hit List.
Prev View	Change the display to the previous option in the view cycle. *Tip:* The view options in order are All, Search, Browse, Document, Contents, and Hit List.

Search Menu

The Search menu (see Figure A-6) is always displayed.

Menu form varies slightly depending on interface mode, with the Go To command being displayed only when the Document pane is active.

Program mode influences available options, as shown in Table A-7.

Figure A-7 Search menu

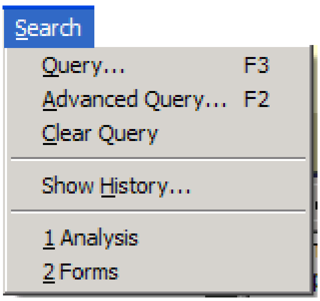


Table A-7 Search Menu Summary

Option	Purpose
Query	Run a natural language search using the Query dialog box (see "Query Dialog Box," on page 50 and "Understanding Natural Language Searching," on page 61).
Advanced Query	Run a Boolean-based search using the Advanced Query window (see "Advanced Query Window," on page 45).
Clear Query	Clear search-related elements [i.e., hit list entries, hit highlighting in publication content, and (assuming your preferences are set to display query results) hit indicators in the table of contents] from the main window. (For more information, see "Clearing a Search," on page 75.) *Note:* The Clear Query command is available only after you have performed a search.
Show History	View a list of searches and hyperlink jumps executed since you opened the active publication and, if desired, repeat any of those actions (see "Viewing Search History and Rerunning a Previous Search," on page 75). *Note:* This command is available only after you have executed a search or a jump link.
Publication-specific query templates	Run a search limited to a predefined type of publication content (see "Query Templates," on page 48, and Appendix B, "Working with Query Templates").

Layout Menu

The Layout menu (see Figure A-8) is displayed only when the Document pane is active.

Most menu options are available only when working within notes posted to a shadow file (see Table A-8 for details).

Figure A-8 Layout menu

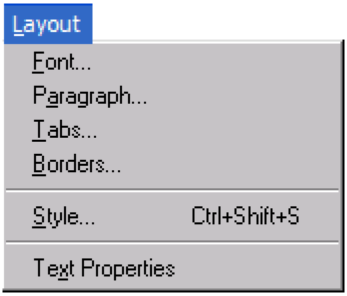


Table A-8 Layout Menu Summary

Option	Purpose
Font	Modify font settings (e.g., family, size, color) for text currently selected in publication content. *Note:* This command is available only when working in a note posted to a shadow file.
Paragraph	Modify settings (e.g., alignment, indentation, space above) for the active paragraph(s) in publication content. *Note:* This command is available only when working in a note posted to a shadow file.
Tabs	Modify tab settings for the active paragraph(s) in publication content. *Note:* This command is available only when working in a note posted to a shadow file.
Borders	Modify border settings for the active paragraph(s) in publication content. *Note:* This command is available only when working in a note posted to a shadow file.

Table A-8 Layout Menu Summary *(Continued)*

Option	Purpose
Style	Format selected publication content by applying a style; also, create new or modify or delete existing styles used to format publication content. ***Note:*** This command is available only when working in a note posted to a shadow file.
Text Properties	View formatting and level information for the paragraph in which the cursor is currently placed in publication content.

Tools Menu

The Tools menu is always available but takes two different forms depending on interface mode.

Tools Menu, Contents or Hit List Mode

With the Contents or Hit List pane active, the Tools menu provides options for customizing the interface and setting program preferences. These options are always available.

Figure A-9 illustrates the Tools menu in Contents or Hit List mode; Table A-9 summarizes the menu options and corresponding purposes.

Figure A-9 Tools menu, Contents or Hit List mode

Table A-9 Tools Menu (Contents or Hit List Mode) Summary

Option	Purpose
Customize	Configure menus and toolbar(s) and/or define keyboard shortcuts. *Note:* You cannot customize the main toolbar.
Options	Set program and interface preferences (see "Setting Program Preferences," on page 22, and "Customizing the Interface," on page 188).

Tools Menu, Document Mode

With the Document pane active, the Tools menu provides options for customizing the interface and setting program preferences as well as for customizing content in shadow files.

Certain menu options are available only when working in a shadow file or following given tasks (see Table A-10 for details).

Figure A-10 illustrates the Tools menu in Document mode.

Figure A-10 Tools menu, Document mode

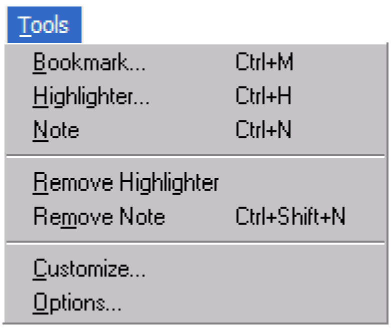


Table A-10 Tools Menu (Document Mode) Summary

Option	Purpose
Bookmark	Insert in publication content a named destination for purposes of quickly finding relevant material (see "Bookmarking Content in Shadow Files," on page 135). *Note:* This command is functional only when working in a shadow file.
Highlighter	Visually enhance material in publication content for purposes of calling attention to that material; also, create new or modify or delete existing highlighting schemes (see "Highlighting Content in Shadow Files," on page 137). *Note:* This command is available only when working in a shadow file.
Note	Annotate individual paragraphs in publication content (see "Annotating Content in Shadow Files," on page 132). *Note:* This command is available only when working in a shadow file.
Remove Highlighter	Clear highlighting from publication content (see "Highlighting Content in Shadow Files," on page 137). *Note:* This command becomes available only after you have applied a highlighter to content in a shadow file.
Remove Note	Delete an annotation from publication content (see "Annotating Content in Shadow Files," on page 132). *Note:* This command becomes available only after you have annotated content in a shadow file.
Customize	Configure menus and toolbar(s) and/or define keyboard shortcuts. *Note:* You cannot customize the main toolbar.

Table A-10 Tools Menu (Document Mode) Summary *(Continued)*

Option	Purpose
Options	Set program and interface preferences (see "Setting Program Preferences," on page 22, and "Customizing the Interface," on page 188).

Window Menu

The Window menu (see Figure A-11) is always displayed and all options on the menu are always available.

See Table A-11 for a summary of Window menu options and corresponding purposes.

Figure A-11 Window menu

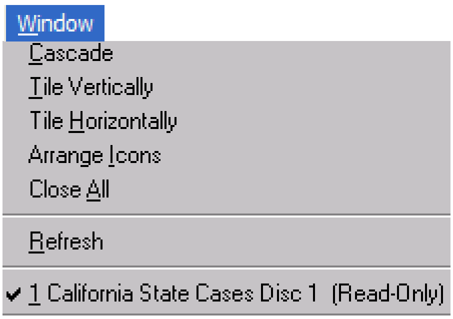


Table A-11 Window Menu Summary

Option	Purpose
Cascade	Arrange all open windows so that they overlap diagonally starting from the upper-left corner of the monitor screen and descending toward the lower-right corner, with only the active window fully visible.

Table A-11 Window Menu Summary *(Continued)*

Option	Purpose
Tile Vertically	Arrange all open windows so that they appear side by side, with each fully visible but proportionately reduced in size horizontally.
Tile Horizontally	Arrange all open windows so that they appear one on top of another, with each fully visible but proportionately reduced in size vertically.
Arrange Icons	After minimizing all open publications and manually arranging the corresponding icons, automatically align all icons in an orderly fashion along the bottom of the interface.
Close All	Exit all open publications.
Refresh	Update the active window to reflect the most recent action performed.
List of open publications	Activate the window corresponding to an open publication.

LexisNexis Menu

The LexisNexis menu (see Figure A-13) is always displayed.

With the exception of the Case Update command (which is available only following a search of a publication containing case material), all menu options are always available.

See Table A-13 for a summary of LexisNexis menu options and corresponding purposes.

Figure A-12 LexisNexis menu

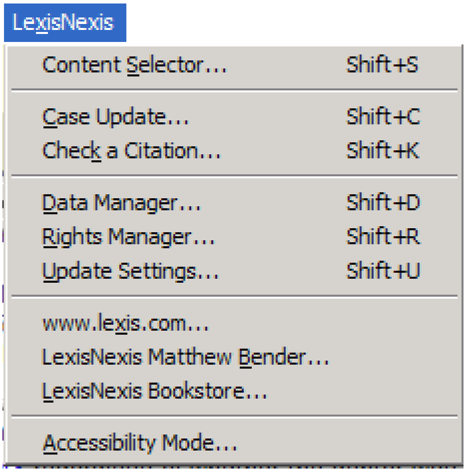


Table A-12 LexisNexis Menu Summary

Option	**Purpose**
Content Selector	Open one or more publications (see “Opening a Publication,” on page 10).
Case Update	Link to the *lexis.com* online research system and re-run the most recently performed search of a case collection against any cases added to the collection since the most recent CD release (see “Searching Updated Case Content on the lexis.com Service,” on page 81).
Check a Citation	Validate research via the online *Shepard’s*® Citations Service on the *lexis.com*® research system. ***Note:*** You must be a subscriber to the *Shepard’s* Citations Service in order to use this feature.

Table A-12 LexisNexis Menu Summary *(Continued)*

Option	Purpose
Data Manager	Copy libraries to a local or network drive, move library copies from one location to another, delete library copies, and/or instruct the program to look in the correct location when libraries have been moved from the most recently verified location (see "Managing Library Data," on page 143). *Note:* This command is available only to standalone users or to those network users set up as Administrator.
Rights Manager	Initiate access to any products to which you subscribed subsequent to installing the most recent CD release of the corresponding library (see "Managing Library Access Rights," on page 154). *Note:* This command is available only to standalone users or to those network users set up as Administrator.
Update Settings Utility	Alert the program when you change word-processing and/or pdf-viewer software (see "Managing Peripheral-Software Integration," on page 157).
www.lexis.com	Link directly to the *lexis.com* service, where subscribers can take advantage of numerous case-finding and analysis tools.
LexisNexis Matthew Bender	Link directly to the Matthew Bender home page on the LexisNexis Web site.
LexisNexis Bookstore	Link directly to the product offerings area of the LexisNexis Web site.

Table A-12 LexisNexis Menu Summary *(Continued)*

Option	Purpose
Accessibility Mode	For visually impaired users, set the program to run in a way that accommodates screen-reader software usage to the greatest extent possible. *IMPORTANT!* Changing between operation modes after the program has been installed requires a reboot and will result in the resetting of program preferences to their default values. If you previously adjusted your program preferences and want to continue using those preferences, you will have to again manually adjust them accordingly. *Tip:* When accessibility mode is enabled, a checkmark is displayed beside this option.

View illustration

Return to "Understanding the Menus"

Help Menu

The Help menu (see Figure A-13) is always displayed and all options on the menu are always available.

See Table A-13 for a summary of Help menu commands and corresponding purposes.

Figure A-13 Help menu

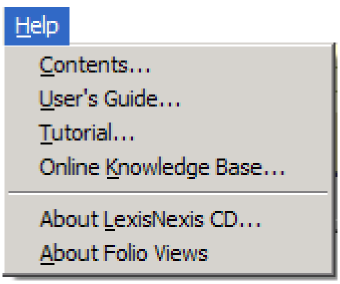


Table A-13 Help Menu Summary

Option	Purpose
Contents	Open for viewing the electronic help file for the *LexisNexis CD* application.
User's Guide	Access for viewing and/or printing the linear-based documentation describing use of the application.
Tutorial	Launch the interactive tutorial containing a series of lessons covering basic program functionality.
Online Knowledge Base	Link to additional support documentation on the LexisNexis Web site.
About LexisNexis CD on Folio 4	Display version and copyright information for *LexisNexis CD* software.
About Folio Views	Display version and copyright information for *Folio Views*® software.

Understanding the Main Toolbar

The *LexisNexis CD* main toolbar (see Figure A-14) contains a set of buttons that you can activate to access commonly used commands. As an aid in identifying the purpose of the various buttons, the program makes use of the Windows feature known as "tool tips." When you let your mouse pointer rest on a toolbar button, the program briefly displays the name of the button.

Table A-14 describes each of the main toolbar buttons.

> ***Note:*** The toolbar is not readable via accessibility (i.e., screen-reader) software and is not available via the keyboard.

Figure A-14 The main toolbar

Table A-14 Summary of main toolbar buttons

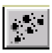
Button	Purpose
	The Content Selector button opens one or more publications (see “Opening a Publication,” on page 10).
	The Print button initiates the process of printing from the active publication (see “Printing Content,” on page 97).
	After linking within or between publications, the Back button returns the focus to the location from which you linked.
	After linking within or between publications and returning to the location from which you linked, the Forward button returns the focus to the most recent link destination.
	The Show History button displays a list of searches and hyperlink jumps executed since you opened the active publication and, if desired, repeat any of those actions (see “Viewing Search History and Rerunning a Previous Search,” on page 75). ***Note:*** This command is available only after you have executed a search or a jump link.
	The Advance Query button displays the Advanced Query window from which you can run a Boolean-based search (see “Advanced Query Window,” on page 45).
	The clear query button removes search-related elements (i.e., hit list entries, hit highlighting in publication content, and hit indicators in the table of contents) from the main window. (For more information, see “Clearing a Search,” on page 75.) ***Note:*** The Clear Query command is available only after you have performed a search.

Table A-14 Summary of main toolbar buttons *(Continued)*

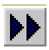
Button	Purpose
	The Previous Hit button moves the focus in the Document pane to the hit that immediately precedes the currently highlighted hit in the currently displayed record. ***Tip:*** If there is no “previous hit” within the currently displayed record, activating this button will move the focus to the last hit in the previous record containing hits. ***Tip:*** This command is available only after you have run a search and navigated beyond the first hit in publication content. If you subsequently navigate back to the first hit, the command again becomes unavailable.
	The Next Hit button moves the focus in the Document pane to the hit that immediately follows the currently highlighted hit in the currently displayed record. ***Tip:*** If there is no “next hit” within the currently displayed record, activating this button will move the focus to the first hit in the next record containing hits. ***Tip:*** This command becomes available only following a search. If you navigate to the last hit in publication content, the command again becomes unavailable.
	The Previous Record Hit button moves the focus in the Document pane to the beginning of the first record that precedes the currently displayed record and contains hits. ***Tip:*** If the focus is currently on the first hit in publication content and you execute this command, the focus will move to the beginning of the record containing the first hit. ***Tip:*** This command becomes available only following a search.

Table A-14 Summary of main toolbar buttons *(Continued)*

Button	Purpose
	The Next Record Hit button moves the focus in the Document pane to the beginning of the first record that follows the currently displayed record and contains hits. *Note:* This command becomes available only following a search. If you navigate to the last record containing a hit, the command again becomes unavailable.
	The Zoom button adjusts the magnification at which text in all panes is displayed, from the default of 100% to a maximum of 500% or a minimum of 10%.
	The Tag Records button flags content for purposes of quickly finding relevant material as well as viewing, exporting, and/or printing only that material (see "Tagging Content," on page 127).
	The Query Template button opens the publication query template specified by the number in the lower-left corner of the button, allowing you to run a search focusing on specific structural elements (e.g., levels, fields, and groups) within given types of content (e.g., analysis, code, and case); see "Query Templates," on page 48.

Customizing the Interface

To help meet your specific needs, the *LexisNexis CD* application lets you customize certain aspects of the interface, including the following:

- Current view
- Pane size
- Display of scroll bars
- Location of view tabs

- Font used to display material in certain window panes
- Types of icons used in table of contents
- Arrangement of all open windows

Changing Your Current View

To accommodate the varied tasks that you may perform at any given time, the *LexisNexis CD* application offers a number of view options along with a quick and easy way of changing your view at any time.

Once you change your view setting, the program will remember your preference until the next time you change it.

> ***Note:*** For detailed descriptions of view options, see Table 2-2, on page 17.

To change your current view

Press the **F7** key until the desired view is displayed.

OR

In the upper portion of the *LexisNexis CD* main window, activate the tab corresponding to the desired view.

> ***Note:*** For detailed descriptions of view options, see Table 2-2, on page 17.

Resizing Panes

At times, you may find that the size of one or more panes inhibits your ability to view material. To address this concern, the *LexisNexis CD* application allows you to easily resize any of the panes (Contents, Reference, Document, or Hit List) whenever more than one pane is displayed.

Once you change pane size, the program will remember your preference until the next time you change it.

To resize panes

1 Position your mouse pointer over the separator line for the pane that you want to resize.

A double-headed arrow appears.

2 With the double-headed arrow displayed, press and hold the primary mouse button and drag the separator line to resize the pane until the pane is the desired size, then release the primary mouse button.

The pane is resized and adjoining panes are also resized proportionately.

Showing or Hiding Scroll Bars

To help you view publication content and search results, the program provides the option of displaying scroll bars in the Contents, Document, and Hit List panes. If you prefer, however, you can hide scroll bars and instead use the arrow keys on your keyboard to change the focal point within these panes.

Once you change your scroll bar settings, the program will remember your preferences until the next time you change them.

> ***Note:*** For those users running the program in accessibility mode, scroll bars are not applicable; rather, scrolling is accomplished via the up arrow, down arrow, left arrow, and right arrow keys.

To show or hide scroll bars

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the tab corresponding to the pane in which you want to change your scroll bar settings (i.e., **Contents**, **Document**, or **Hit List**).

3 Elect to show or hide scroll bars as desired:

- To show the **Vertical scroll bar**, activate the corresponding check box until a checkmark appears.
- To hide the **Vertical scroll bar**, activate the corresponding check box until the checkmark is cleared.

> ***Tip:*** To scroll vertically in a pane without the vertical scroll bar, use the up and down arrow keys on your keyboard.

- To show the **Horizontal scroll bar**, activate the corresponding check box until a checkmark appears.

> ***Note:*** The horizontal scroll bar is not available in the Hit List pane.

- To hide the **Horizontal scroll bar**, activate the corresponding check box until the checkmark is cleared.

> ***Tip:*** To view complete text of entries in the table of contents without the horizontal scroll bar, either position the mouse pointer so that it rests on the entry and leave it there until the full text appears or use the left and right arrow keys on your keyboard. To scroll publication content horizontally without the horizontal scroll bar, use the left and right arrow keys on your keyboard.

4 Set scroll bar preferences for additional panes or save your scroll bar preferences, as desired:

- To set scroll bar preferences for another pane, repeat steps 2 and 3.

  OR

- To save your scroll bar preferences, proceed to step 5.

5 Activate the **OK** button.

The Options dialog box closes, and your scroll bar settings are reflect in the given pane(s).

Positioning or Hiding View Tabs

The *LexisNexis CD* application, allows you to position the view tabs either at the top or bottom of the main window or, if you always use the same view and would prefer to free up visual space, to hide the view tabs altogether.

Once you change your view tab settings, the program will remember your preference until the next time you change it.

> ***Note:*** For detailed descriptions of view options, see Table 2-2, on page 17.

> ***Tip:*** View tabs are not available via the keyboard and are inaccessible to screen-reader software. When running the program in accessibility mode, the F7 key is instead used to change view.

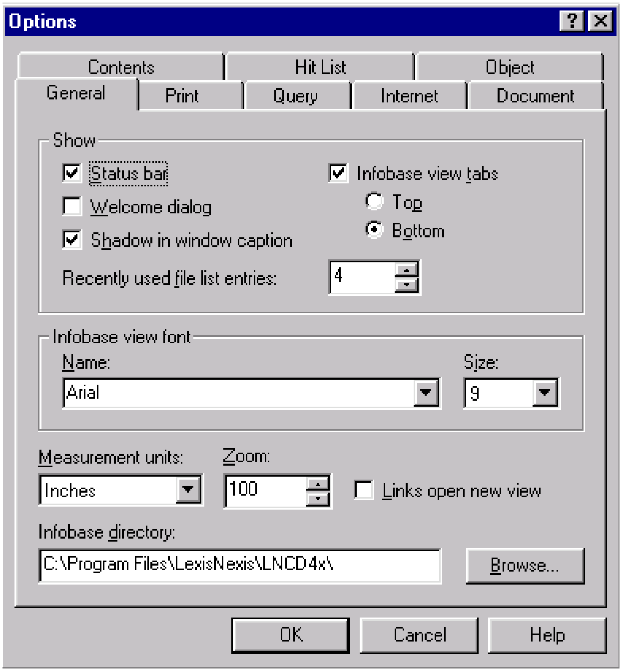
To position the view tabs

1. From the **Tools** menu choose **Options.**

   The Options dialog box opens.
2. Activate the **General** tab (see Figure A-15).
3. In **Infobase view tabs** area, choose the desired position for the view tabs:
   - To position the view tabs at the **Top** of the main window, activate the corresponding radio button until a dot appears.

     OR
   - To position the view tabs at the **Bottom** of the main window, activate the corresponding radio button until a dot appears.

Figure A-15 General tab in Options dialog box



4 Activate the **OK** button.

The Options dialog box closes, and the chosen view tab location is reflected in the main window.

▸ **To hide the view tabs**

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **General** tab (refer to Figure A-15, on page 192).

3 Activate the check box beside **Infobase view tabs** until the checkmark is cleared.

4 Activate the **OK** button.

The Options dialog box closes, and the view tabs are cleared from the main window.

Setting Display Font

The *LexisNexis CD* application offers great flexibility with regard to the font used for displaying material in the Contents, Reference, and Hit List panes.

Once you change your display font setting, the program will remember your preference until the next time you change it.

▸ **To set display font**

1 From the **Tools** menu choose **Options**.

The Options dialog box opens.

2 Activate the **General** tab (refer to Figure A-15, on page 192).

3 In **Infobase view font** area, select the desired font **Name** and/or **Size** from the corresponding drop-down list(s).

4 Activate the **OK** button.

The Options dialog box closes, and your font setting is reflected in the Contents, Reference, and Hit List panes of the main window.

> ***Tip:*** If you simply want to adjust the size of the font without changing the font family, do one of the following:
>
> - From the **View** menu choose **Zoom**. In the Zoom dialog box, indicate the desired magnification percentage, then activate the **OK** button.
>
>   ***OR***
> - From the **Tools** menu choose **Options**. In the Options dialog box, activate the **General** tab then indicate the desired magnification percentage in the **Zoom** field and activate the **OK** button.
>
> Your zoom preference is immediately reflected in ***all*** panes and will remain in effect until the next time you change it.

Setting Table of Contents Icon Style

Among the visual elements that you can customize in the *LexisNexis CD* application are the icons used to expand and collapse levels in the table of contents.

Once you change your setting for the table of contents icons, the program will remember your preference until the next time you change it.

▸ To set table of contents icon style

1. From the **Tools** menu choose **Options.**

   The Options dialog box opens.
2. Activate the **Contents** tab (refer to Figure 3-4, on page 34).
3. Activate the drop-down arrow beside **Expandable branch image** and choose the desired icon style from the list.
4. Activate the **OK** button.

   The Options dialog box closes, and the chosen table of contents icon style is reflected in the main window.

Arranging Windows

Because you may at times have more than one publication open, the *LexisNexis CD* application offers flexibility in the display and placement of open windows.

To arrange windows

With more than one publication open, activate the **Window** menu (refer to Figure A-11, on page 180) then choose one of the following options:

- **Cascade** — to arrange all open windows so that they overlap diagonally starting from the upper-left corner of the monitor screen and descending toward the lower-right corner, with only the active window fully visible
- **Tile Vertically** — to arrange all open windows so that they appear side by side, with each fully visible but proportionately reduced in size horizontally
- **Tile Horizontally** — to arrange all open windows so that they appear one on top of another, with each fully visible but proportionately reduced in size vertically.

Appendix B Working with Query Templates

The *LexisNexis® CD* application offers a number of query templates, allowing you to craft searches focusing on specific structural elements (e.g., levels, fields, and groups) within given types of content (e.g., analysis, code, and case). In this way, you can easily hone a search without having to know the underlying syntax.

While available query templates vary depending on the specific publication, some of the most common categories of query templates are as follows:

- Analysis
- Case
- Code
- Forms
- Indexes

Analysis Query Template

The Analysis query template (see Figure B-1) allows you to find relevant discussions of a subject by searching the title and/or the body of analytical documents for specified search criteria.

The query template contains two fields:

- **Search Chapter Titles for the word(s) below**
- **Search Chapters for the word(s) below**

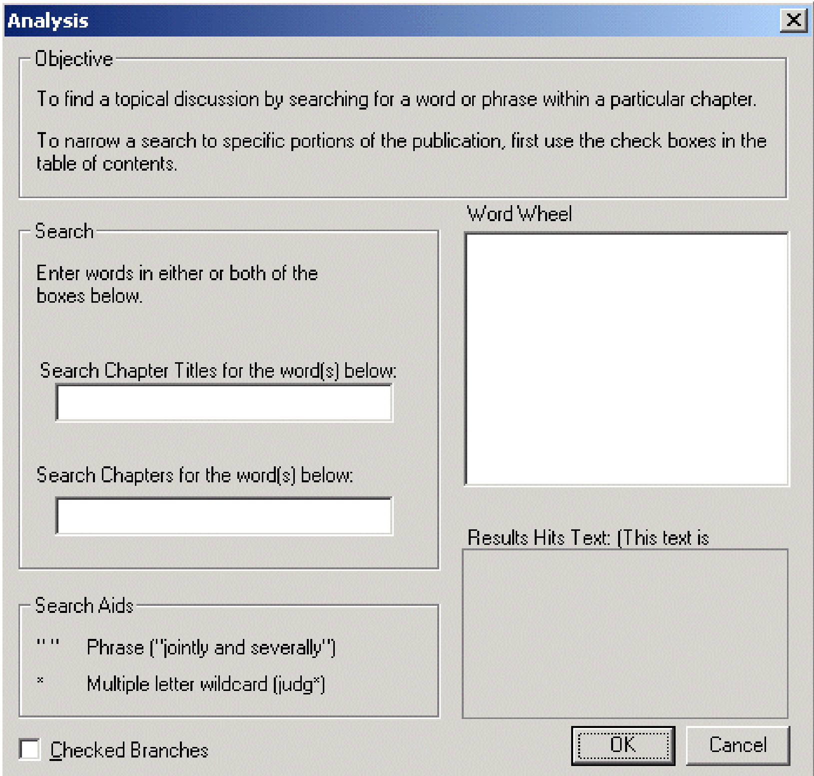
These fields can be used together or separately. When used together, the first field takes precedence, meaning that the program will first find all chapters having titles containing the search criteria entered in the first field and will then search the body of only those chapters for the search criteria entered in the second field, finally returning only those analytical documents matching the search criteria you entered in both fields.

When searching for information using this query template, follow these general guidelines:

- Use the first field alone to go to a specific chapter.

- Use the second field alone to find chapters relating to a specified topic.
- Use the fields together to find a specified topic within a specific chapter.

Figure B-1 Analysis query template



Case Query Templates

The *LexisNexis CD* application provides a number of query templates for use in searching case collections, including the following:

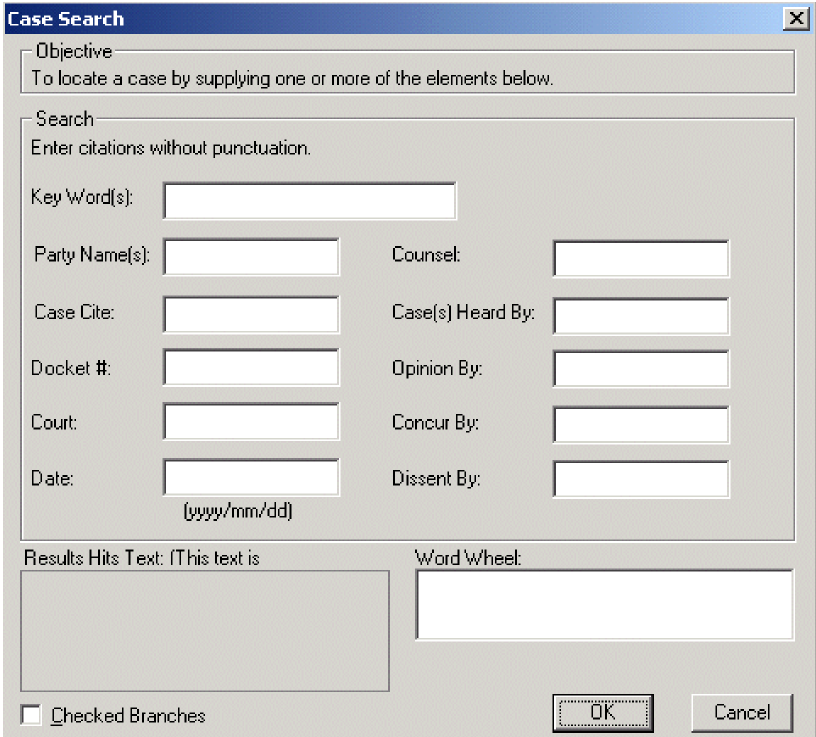
- Case Search
- Go To Case
- Judges

- Page Finder

Case Search Query Template

The Case Search query template (see Figure B-2, on page 199) would most commonly be used to find cases related to a specified topic.

Figure B-2 Sample Case Search query template



To search for cases based on topic

1 Open the case collection that you want to search. (For instructions on opening a publication, see “Opening a Publication,” on page 10.)

> ***Tip:*** You can elect to limit your search to only selected portions of the case collection (e.g., courts, years). To do so, you must indicate those portions in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2. Open the query template by either activating the **Search** menu and choosing **Case Search** from the bottom of the menu or activating the corresponding  button in the main toolbar.

   The Case Search query template opens.

3. In the **Key Word(s)** field, enter one or more query terms related to the topic for which you want to find related cases.
4. Activate the **OK** button.

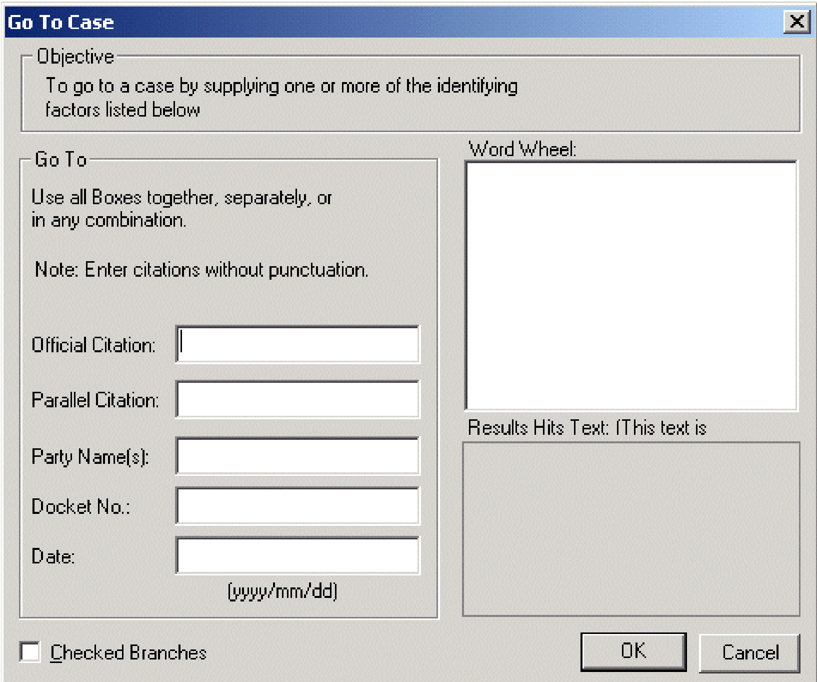
   The application searches for the specified query in the body of all cases (or all cases in the selected subset) in the active case collection.

Go To Case Query Template

The Go To Case query template (see Figure B-3, on page 201) is used to go to a case for which you have some identifying information.

> ***Search Hint:*** Please note the in order to find an exact match when searching by party names or by a docket number that includes punctuation, you must enclose the search criteria in quotation marks (e.g., "CIV.A.90-1380-T"); note that you need not enclose citations in quotation marks (e.g., 517 U.S. 44).

Figure B-3 Sample Go To Case query template



▸ To go to a known case

1 Open the case collection that you want to search. (For instructions on opening a publication, see “Opening a Publication,” on page 10.)

> ***Tip:*** You can elect to limit your search to only selected portions of the case collection (e.g., courts, years). To do so, you must indicate those portions in the table of contents before opening the query template. For further details, see “Searching Selected Divisions of the Active Publication,” on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Go To Case** from the bottom of the menu or activating the corresponding button in the main toolbar.

The Go To Case query template opens.

3 In the desired query input field(s), enter corresponding information.

> ***Search Hints*:** Please note the following with regard to this query template:
>
> - If searching by party name, note that such a search may return more than one result if by chance the specified names are duplicated across cases.
> - To ensure finding an exact match when searching by party names or by a docket number that includes punctuation, enclose the search criteria in quotation marks (e.g.,"CIV.A.90-1380-T"); note that you need not enclose citations in quotation marks (e.g., 517 U.S. 44).

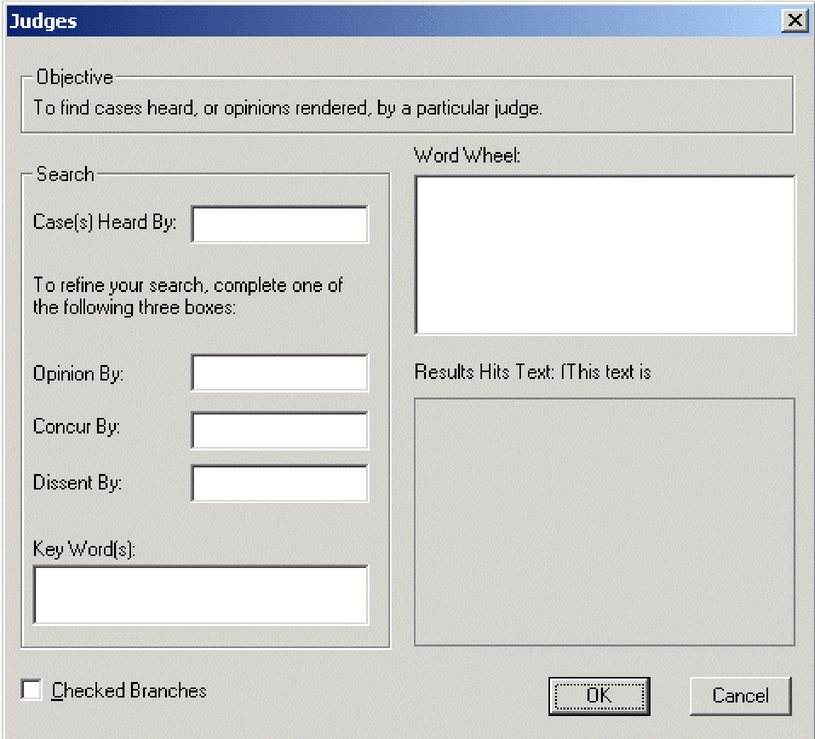
4 Activate the **OK** button.

The application searches for the specified term(s) in the heading of all cases (or all cases in the selected subset) in the active case collection.

Judges Query Template

The Judges query template (see Figure B-4, on page 203) is used to find cases heard by a particular judge.

Figure B-4 Sample Judges query template



‣ To find cases heard by a particular judge

1 Open the case collection that you want to search. (For instructions on opening a publication, see “Opening a Publication,” on page 10.)

> ***Tip:*** You can elect to limit your search to only selected portions of the case collection (e.g., courts, years). To do so, you must indicate those portions in the table of contents before opening the query template. For further details, see “Searching Selected Divisions of the Active Publication,” on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Judges** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Judges query template opens.

3 In the **Case(s) Heard By, Opinion By, Concur By,** or **Dissent By** field(s), type desired judge name(s).

> ***Note:*** You can search by only one of these parameters at a time.

4 Activate the **OK** button.

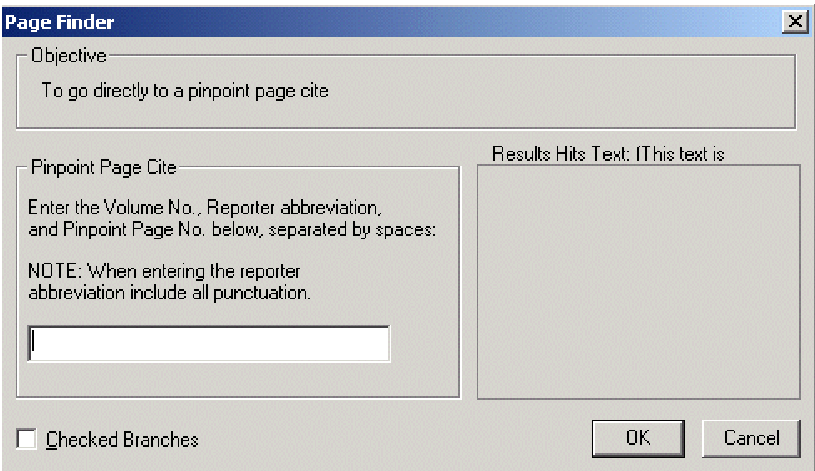
The application searches for the specified judge name(s) in the specified capacity in all cases (or all cases in the selected subset) in the active case collection.

Page Finder Query Template

The Page Finder query template (see Figure B-5, on page 204) is used to go directly to a specific pinpoint page within a case.

> ***Search Hint:*** You must use correct punctuation and spaces when entering a pinpoint page number (e.g., 115 L. Ed. 2d 105), but you need not enclose the number in quotation marks. For purposes of this query template, construct the pinpoint page cite as follows: Volume Number, Reporter Abbreviation, Pinpoint Page Number. Note that you should ***not*** include the initial page number.

Figure B-5 Sample Page Finder query template



To go to a pinpoint page number within a case

1 Open the case collection that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected portions of the case collection (e.g., courts, years). To do so, you must indicate those portions in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Page Finder** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Page Finder query template opens.

3 Complete the query input field.

> ***Search Hint:*** You must use correct punctuation and spaces when entering the pinpoint page number (e.g., 115 L. Ed. 2d 105), but you need not enclose the number in quotation marks. For purposes of this query template, construct the pinpoint page cite as follows: Volume Number, Reporter Abbreviation, Pinpoint Page Number. Note that you should ***not*** include the initial page number.

4 Activate the **OK** button.

The application searches for the specified pinpoint page number in all cases (or all cases in the selected subset) in the active case collection.

Code Query Template

The Code query template (see Figure B-6) allows you to quickly go to a specific code section or to find code sections relating to a specific topic.

The template contains two search fields:

- **Go to the following Section Number**
- **Search Code Sections for the following word(s)**

These fields can be used together or separately. When used together, the first field takes precedence, meaning that the program will first find all code sections having titles containing the search criteria entered in the first field and will then search the body of only those sections for the search criteria entered in the second field, finally returning as search results only those records matching the search criteria you entered in both fields.

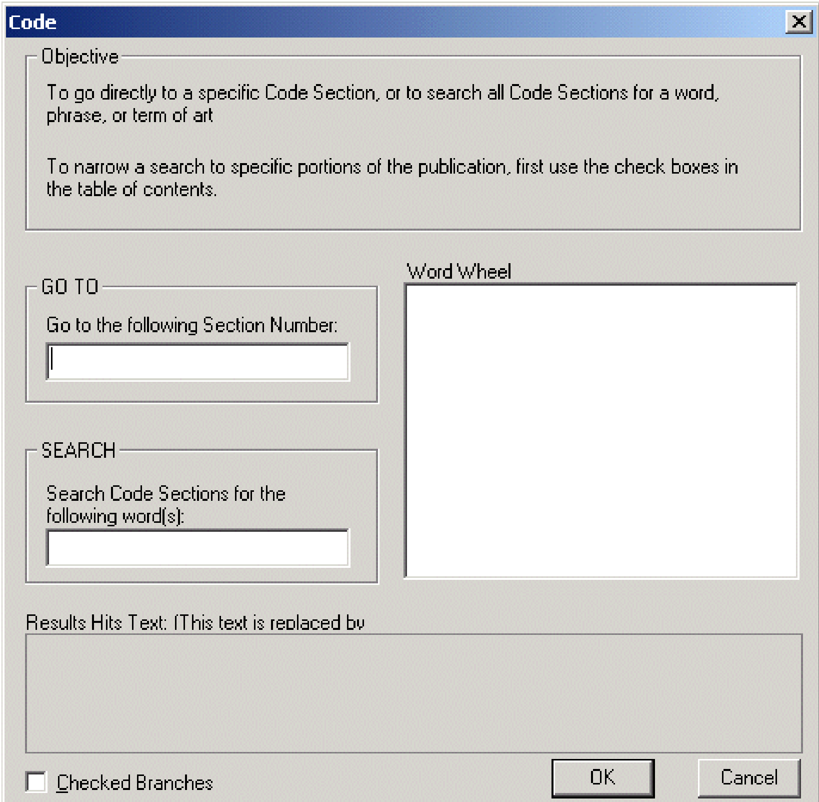
When searching for information using this query template, follow these general guidelines:

- Use the first field alone to go to a specific code section.
- Use the second field alone to find code sections relating to a specified topic.

Search Hint: If you are searching for a code section by number and that number contains punctuation, be sure to enclose your search criteria in quotation marks (e.g., "20:33").

Common search scenarios for which you may use the Code query template are highlighted in the procedures following.

Figure B-6 Sample Code query template



▸ To go to a specific code section

1 Open the publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected components of the publication. To do so, you must indicate those components in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Code** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Code query template opens.

3 In the **Go to the following Section Number** field, enter the desired section number.

> ***Search Hints***: Please note the following with regard to this field:
>
> - Enter only the code section number, as opposed to the full cite. For example, if searching for 11 U.S.C. 362, you would enter "362"; note, however, that you should also select in the table of contents the heading that contains title 11 of the United States Code.
> - If the code section number contains punctuation, be sure to enclose it in quotation marks (e.g., "20:33").

4 Activate the **OK** button.

The application searches for the specified number in the headings of all sections (or all sections in the selected subset) in the active publication.

▸ To find a code by topic

1 Open the publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected components of the publication. To do so, you must indicate those components in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Code** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Code query template opens.

3 In the **Search Code Sections for the following word(s)** field, type the desired query. (See Chapter 6, "Formulating a Query"for details on crafting search criteria.)

4 Activate the **OK** button.

The application searches for the specified query in the body of all code sections (or all code sections in the selected subset) in the active publication.

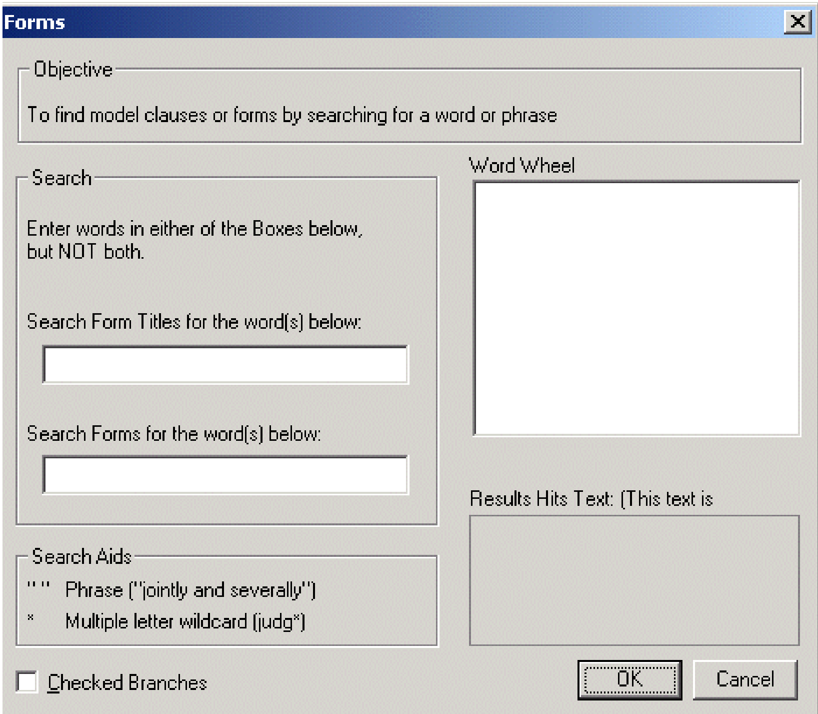
Forms Query Template

The Forms query template (see Figure B-7) allows you to go to a specific form by focusing on actual form numbers or titles or to find forms relating to a specified topic by searching for words or phrases within the forms themselves.

> ***Search Hint:*** If you are searching for a form by number and that number contains punctuation, be sure to enclose your search criteria in quotation marks (e.g., "20:33").

Common search scenarios for which you may use the Forms query template are highlighted in the procedures following.

Figure B-7 Sample Forms query template



▸ To go to a specific form

1 Open the publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected components of the publication. To do so, you must indicate those components in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Forms** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Forms query template opens.

3 In the **Search Form Titles for word(s) below** field, type the specific form number and/or word(s) from the form title.

> ***Search Hint:*** If the form number contains punctuation, be sure to enclose it in quotation marks (e.g., "20:33").

4 Activate the **OK** button.

The application searches for the specified form number or title in the title of all forms (or all forms in the selected subset) in the active publication.

▸ To find forms by topic

1 Open the publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected components of the publication. To do so, you must indicate those components in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Forms** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Forms query template opens.

3 In the **Search Forms for the word(s) below** field, type the desired query. (See Chapter 6, "Formulating a Query," for details on crafting search criteria.)

4 Activate the **OK** button.

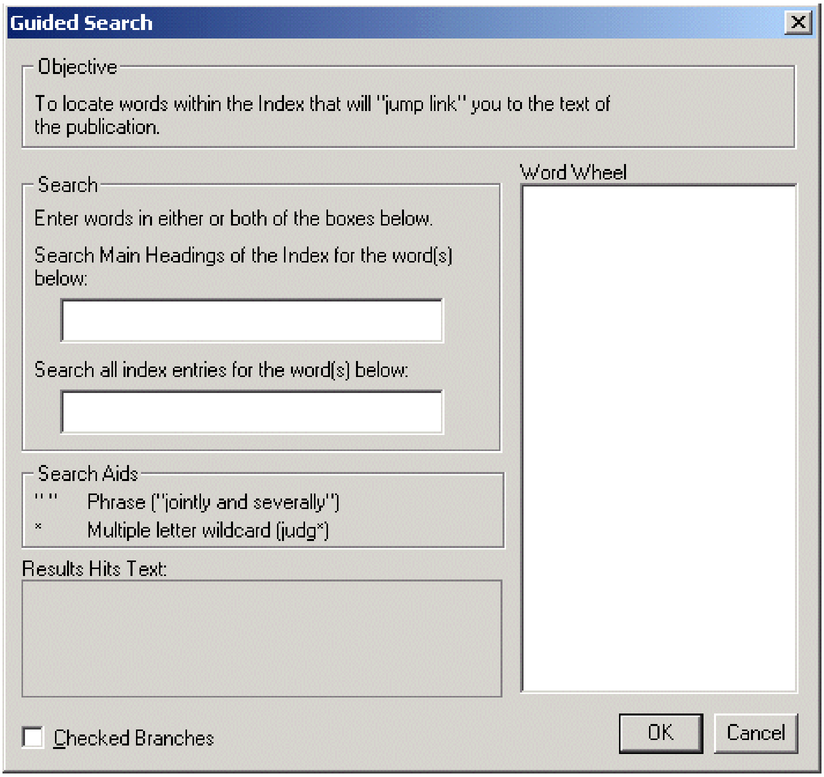
The application searches for the specified query in the body of all forms (or all forms in the selected subset) in the active publication.

Guided Search Query Template

The Guided Search query template (see Figure B-8) allows you to find specified topics by searching either the main headings or all entries in an index publication.

A common search scenario for which you may use the Guided Search query template is highlighted in the procedure following.

Figure B-8 Sample Guided Search query template



▸ To find a specified topic in an index

1. Open the index publication that you want to search. (For instructions on opening a publication, see "Opening a Publication," on page 10.)

> ***Tip:*** You can elect to limit your search to only selected components of the publication. To do so, you must indicate those components in the table of contents before opening the query template. For further details, see "Searching Selected Divisions of the Active Publication," on page 65.

2 Open the query template by either activating the **Search** menu and choosing **Guided Search** from the bottom of the menu or activating the corresponding  button in the main toolbar.

The Guided Search query template opens.

3 In the applicable input field(s), type the desired query. (See Chapter 6, "Formulating a Query," for details on crafting search criteria.)

4 Activate the **OK** button.

The application searches for the specified query in the main headings and/or all entries in the active publication or selected subset of the active publication.

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