



LexisNexis®

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# Lexis Advance® Quick Reference Guide

This Guide shows you where to find—and how to use—Lexis Advance® features you'll use often. Keep this Guide handy for reference.

On the road? Need the facts? You can gain access to Lexis Advance with current smartphones, tablets and laptops at [lexisadvance.com](http://lexisadvance.com). Lexis Advance screens adapt automatically.

## Download other Lexis Advance how-to literature, videos, tips and more!

The [Lexis Advance Support & Training site](#) can help you with sign-in issues and update you on new Lexis Advance enhancements.

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Please note: All screens shown may change slightly as new sources, features and enhancements are added.

Sign in: [lexisadvance.com](http://lexisadvance.com) | Learn more: [lexisnexis.com/advancesupport](http://lexisnexis.com/advancesupport)

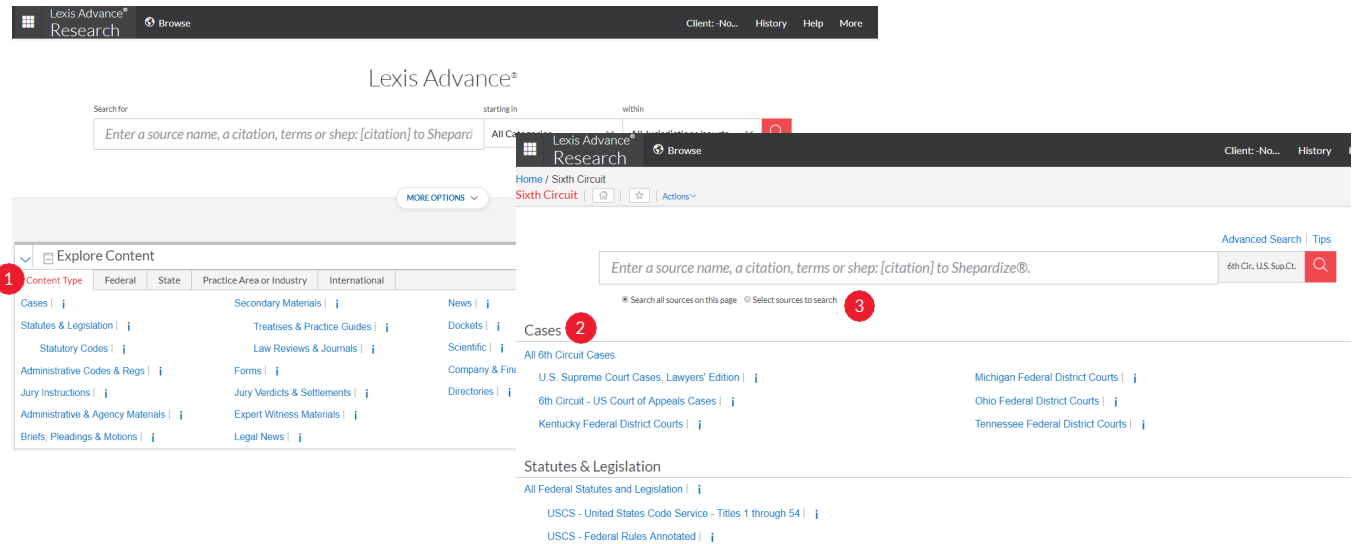
## Start your search: homepage

The screenshot shows the Lexis Advance Research homepage. At the top left is the Lexis Advance Research logo (B). To its right is a 'Browse' button (A). On the top right, there are links for 'Client: -No...', 'History', 'Help', and 'More' (F, G, H). The main heading is 'Lexis Advance®'. Below it is a search bar (I) with a placeholder text: 'Enter a source name, a citation, terms or shep: [citation] to Shepard'. To the right of the search bar are dropdown menus for 'starting in' (All Categories) and 'within' (All Jurisdictions/courts) (J), and a search button. Below the search bar are two more dropdown menus: 'practice areas' (All Practice Areas) and 'favorites' (View Favorites). Below these are links for 'Advanced Search', 'Get A Doc Assistance', and 'Tips' (D, E). A 'FEWER OPTIONS' button is also visible. At the bottom, there is an 'Explore Content' section (K) with a grid of content types including Cases, Statutes & Legislation, Administrative Codes & Regs, Jury Instructions, Administrative & Agency Materials, Briefs, Pleadings & Motions, Secondary Materials, Treatises & Practice Guides, Law Reviews & Journals, Forms, Jury Verdicts & Settlements, Expert Witness Materials, Legal News, News, Dockets, Scientific, Company & Financial, Directories, Intellectual Property, Practical Guidance, Public Records, Custom Pages, and Practice Centers.

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

- A** **Return to the home page.** Click **Lexis Advance Research** on any screen.
  - B** **Access other subscription products.** Click the grid for access to your other subscription products, such as LexisNexis® Public Records, Dossier, and CourtLink.
  - C** **Browse sources, legal topics** or link to **practice centers**. Click **Browse**. Select **Sources**, **Legal Topics** or **Practice Centers**. Drill through the hierarchy or search for specific sources or topics. Also find sources via Explore Content. See K.
  - D** **Move to fill-in-the-blank advanced search forms** by content type that develop a search for you.
  - E** **Find the right citation format fast.** Click the **Get a Doc Assistance** link to retrieve by citation, party name or docket number.
  - F** **Change/edit client matter IDs** to separately track and manage research projects.
  - G** **Return to recent searches** or documents retrieved. Also connect via the History pod below the Search Box.
  - H** **Link to Settings**, Help, Live Chat Support, Sign Out, etc. Also gain access to Folders (if available,) Alerts and Notifications.
  - I** Place your cursor in the Search Box and view your last five searches. Or **enter your search words, find sources and more**. Enter a:
    - **natural language** search and click **Search**. No source selection necessary
    - **terms and connectors** search, e.g., *americans disabilities /20 alcohol!* and click **Search**
  - **citation** to find the full-text document, e.g., *800 f2d 111* or *6 uscs @1170 e* (@ replaces the section symbol)
  - **partial or full source title**, e.g., Collier, to find a source title to add to your search
  - **popular case name**, e.g., *roe v. wade*, and click **Search** to retrieve the full-text document as well as search results for that case
  - **popular statute name**, e.g., *Georgia Lemon Law*, and click **Search** to retrieve the full-text document as well as search results for that statute
  - **Shepard's® request**, e.g., *shep: 800 f2d 111*, and click **Search**
- As you type, the Search Box offers suggested legal phrases, documents or sources.**
- J** **Refine your search up-front and filter** by content, jurisdiction or practice area. **Also find recent sources, filters or topics.** You can also filter your **search results**.
  - K** **Use the Explore Content** pod to navigate by content areas, jurisdiction or practice area/industry and select specific sources or group sources to search.

# Start your search: Explore Content to find sources to search



The **Explore Content** pod on the Lexis Advance home page lets you quickly assemble, search and review just the sources you want. Explore source hierarchies by Content Type, by Federal, State or International jurisdiction, or by Practice Area or Industry.

- 1 Choose a tab.
- 2 Click through the source hierarchy screens.
- 3 Select a *source* or search *all sources on the screen displayed*. The Search Box shows your choices as you select. When you're ready, enter your search words and search.

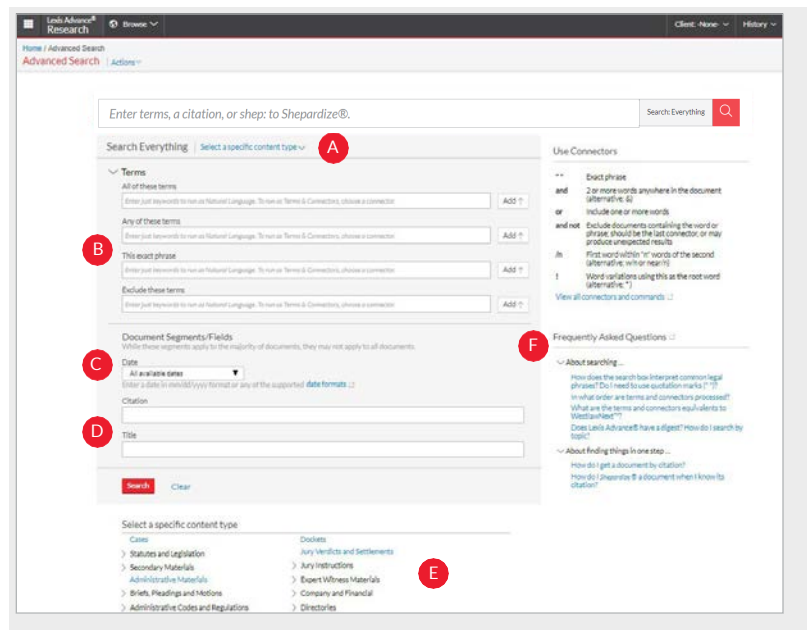
To choose *multiple sources*, click **Select sources to search**, then select source checkboxes.

To make your combination a *Favorite*, click the star in the Narrow By: box.

# Advanced Search: build a search and search by segment

Select the **Advanced Search** link below the Search Box to move to Advanced Search forms.

- A **Your search is built for you!** As you enter words in the fields (see D), the query displays in the Search Box.
- B **Search for words** in the entire document. The fields help you use the right connector, e.g., OR or AND. Plus you can ...
- C **Select a date**, e.g., before, after or in between two dates.
- D **Each field is a document segment** or part. Limit your search to specific document parts, if you choose.
- E **Move to another** Advanced Search form. Click the down arrow to open a category of search forms. Or choose the **Select a specific content type** pull-down menu at the top of the form.
- F **Get help** with searches, including search commands. Even find segment examples and answers to frequently asked questions.

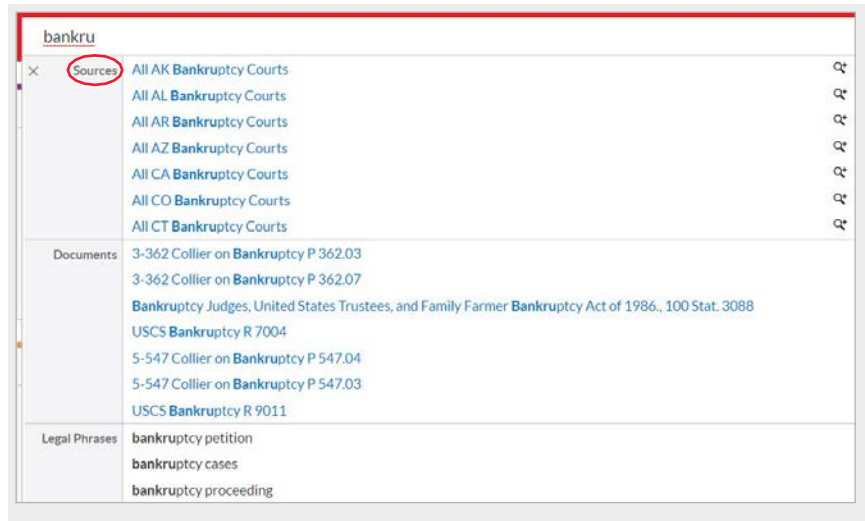


## Browse Sources: find specific sources to search

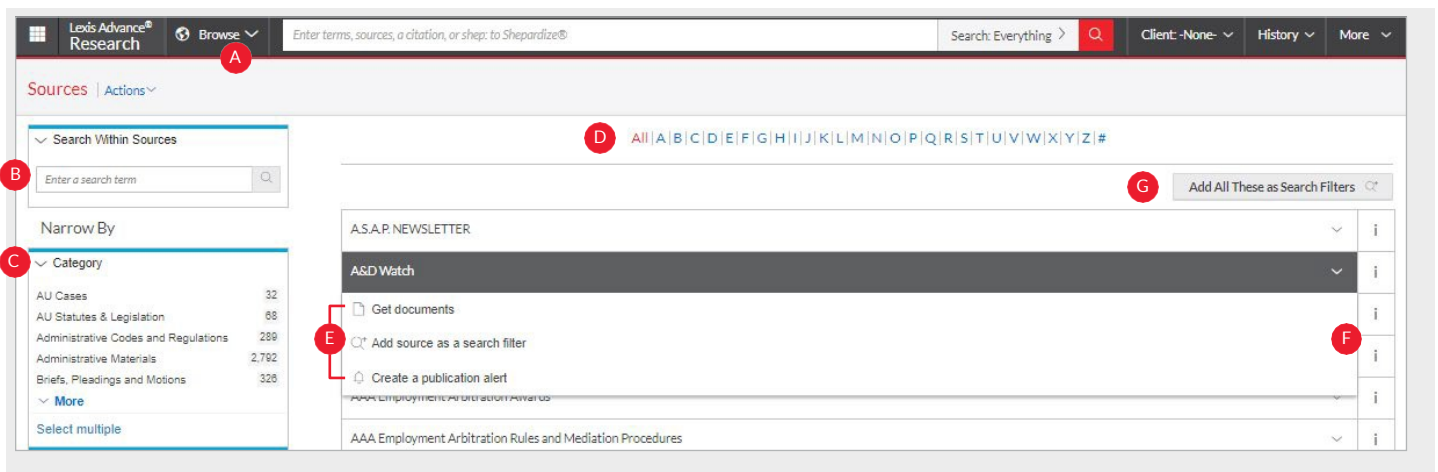
You don't need to select sources before you search at Lexis Advance. But if you want to search specific sources, you can find them via [Explore Content](#) or:


### If you know the source name or partial name, enter it in the Search Box.

- Select a source title and move to an Advanced Search form for that content type. If the source is a TOC (Table of Contents), you move to that open TOC.
- Select the magnifying glass icon next to a title to add it to your search in the Search Box.

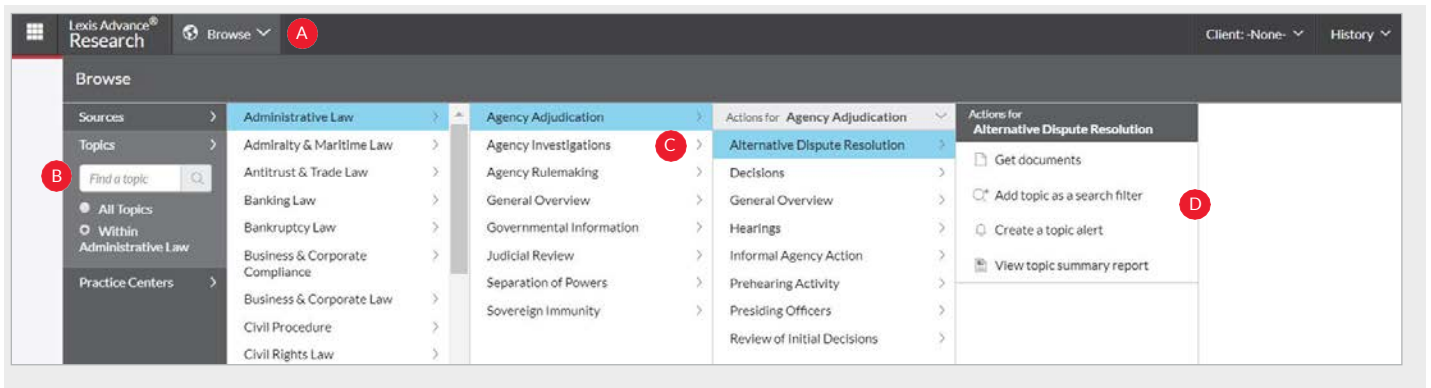


### You can also search or browse source listings:



- A** Click **Browse** then select **Sources**. Browse by jurisdiction, content category, practice area and more. Or click **All Sources** to search and browse alphabetically by title.
- B** **Enter a title or partial title**. Suggestions are provided as you type. Click the gray magnifying glass to search.
- C** **Filter sources** by content categories, jurisdictions, etc. Find what you need more quickly by selecting filters, e.g., News, then California.
- D** **Browse sources alphabetically**. Use this bar first to select a letter. Then add content and jurisdiction filters.
- E** **Click a source** link and you can:
  - add the source to your search
  - retrieve all available documents for that source
  - set up an Alert update to get new releases from that source
- F** **Click the information icon**  to display the source description with details on content, coverage and update schedule.
- G** Click the **Add All These as Search Filters** button to add all the sources on the screen to your search.

## Browse Topics: find and search by legal topic

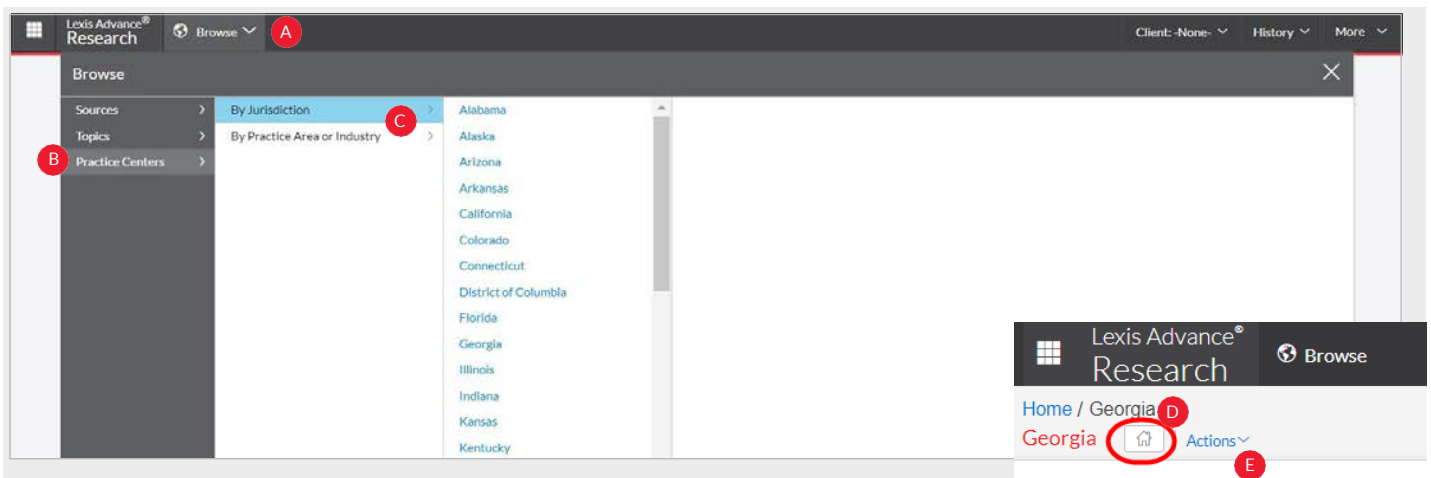


If you prefer to find a legal topic to begin your research, start in Browse Topics. You can also enter this Lexis Advance legal topic hierarchy by selecting a **relevant headnote** in a case you are viewing.

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

## Browse Practice Centers: link to practice/jurisdiction sources

Begin research in specific practice area/industry or jurisdiction centers. Once you find and open a practice center, you can make it your start page that displays after you sign in to Lexis Advance.



To find a practice center:

- A** Click the **Browse** pull-down menu.
- B** Select **Practice Centers**.
- C** Choose **By Jurisdiction** or **By Practice Area or Industry**.
- D** Select the **link** to the page you need. Once you open the page, make it your start page.
- E** Click the **Actions** pull-down menu to get a link to this page.

## Filter: refine your search up-front and save browsing time

The screenshot shows the Lexis Advance search interface. At the top, there is a navigation bar with the Lexis Advance Research logo and a 'Browse' button. On the right, there are links for 'Client: -None-', 'History', 'Help', and 'More'. The main search area is titled 'Lexis Advance®' and contains a search box with the placeholder text 'Enter a source name, a citation, terms or shep: [citation] to Shepardize®.' To the right of the search box are two dropdown menus: 'All Categories' (marked with a red 'A') and '2 Jurisdictions/courts' (marked with a red 'B'). A red search icon (marked with a red 'C') is located to the right of the '2 Jurisdictions/courts' dropdown. Below the search box, there are two main filter sections: 'U.S. Federal' and 'States & Territories'. The 'U.S. Federal' section has two columns: 'By Court' and 'By Circuit'. Under 'By Court', there are checkboxes for 'United States Supreme Court', 'Federal Courts of Appeals', 'Federal District Courts' (which is checked), 'Bankruptcy Courts', 'Military Courts', 'Ct of Appeals for Veterans Claims', 'Other Federal Courts', 'Tax Court', and 'Tribal'. Under 'By Circuit', there are checkboxes for '1st Circuit', '2nd Circuit', '3rd Circuit', '4th Circuit', '5th Circuit', '6th Circuit', '7th Circuit', '8th Circuit', '9th Circuit', and '10th Circuit'. The 'States & Territories' section has a column of checkboxes for various states and territories, including Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Dist. of Columbia, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan (which is checked), Minnesota, Missouri, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Northern Marianas, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virgin Islands, Virginia, Washington, and West Virginia. There is also a checkbox for 'Include related Federal content'.

You can filter your [search results](#) to limit the number of documents. But you can also save time up-front and filter before you search, choosing categories and/or jurisdiction/courts.

- A** Click the **All Categories** pull-down: Category options include all content types available.
- B** Click the **All Jurisdiction/courts** to narrow by specific jurisdiction/court.
- C** Enter your search terms in the search box, and click the red search icon.

## Search results: find the most relevant documents fast

The screenshot displays the Lexis Advance Research interface. At the top, the search bar contains the query "student loan discharge chapter 13 undue hardship". The results section shows 757 cases. A filter sidebar on the left allows for refining results by court (Federal, 1st-5th Circuits) and content category. A specific case, "In re Jordan", is highlighted with an overview box. The interface includes various icons for alert, actions, saving to folders, printing, and sorting. Red callout letters A through F are placed over the interface to indicate key features.

You have many options for refining and using your search results from this screen.

- A** **Set up an Alert** for your search—across content types, if you choose. Click the **bell** icon next to your search.
- B** Select **Actions** to add a search to a Folder (if available), re-run your search using terms & connectors or natural language, include/exclude legal phrase equivalents, or create a link back to this screen of results.
- C** **Save to a Folder (if available)**. Check the box next to the document title then click the **Add to Folder** icon. Select a Folder. When that document appears in future results, it displays the **Saved to Folder** icon. Click the icon for quick Folder access. (Note: Not all federal courts have folder enabled.)
- D** **Print, download, or email** without opening documents. Check the box next to your document title(s) and click a Delivery icon—print, download or email. Or create a printer-friendly page of results.
- E** **Sort documents**. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc. To change your default order, select **Edit Default Order**.
- F** **Browse just the titles**. Click on **Title View** to see an efficient list of your results. In case results, there is an additional **Graphical View icon, and Ravel View**.
- G** **Refine your search**. Need a smaller, more focused results set? Filter by:
  - **Court/jurisdiction**, e.g., select single or multiple jurisdictions. Bring up to three preferred courts jurisdictions to the top of your filters list every search. Open the **Courts** filter and select **Edit Settings**
  - **Content category**, e.g., statutes, secondary sources and more. Select a content type or click the drop down to see additional content categories
  - **Date**, i.e., slide the timeline or enter dates (not shown)
  - **Adding more words** to your search. Enter them in the **Search Within Results** box
  - **Content options**, e.g., refine cases by attorney/firm, judge, etc. Each category offers different filter options, so you can only filter one content category at a time

**To add filters:** Click a filter link; **it displays under Filters**. Remove the filter; in the blue box above the search results(not shown). Select and remove multiple filters.

**Save favorite filter combinations**, e.g., your practice area and jurisdiction, to use again. Click the **star above the results list** and save the combination to your Favorites.

## Folders: save documents, select text, searches, etc. (not available for all courts)

The screenshot shows the Lexis Advance Research interface. At the top, there's a search bar and navigation options. The main area displays a folder named 'Age Discrimination'. On the left, there's a 'Folders' sidebar with a search box and a 'Create New Folder' button. The main area shows a list of documents with details like 'Nev. Rev. Stat. Ann. § 612.385' and '5 USCS § 5596'. A 'Recycle Bin' link is visible at the bottom left. An 'Update document' button is at the bottom right.

Gain access to **Folders** from the **More** pull-down menu at the top of most Lexis Advance screens and choose Folders. **Note that Folders and/or Notes are not available to all court users. Ask your librarian about Folder access.**

**Save more than full-text documents.** Copy and save selected document text, search results lists, effective searches (with your chosen pre-search filters), Research Maps from History, Topic Summary Reports, PDFs, etc. Save up to 2,000 items per folder.

**Subscription documents stay in Folders** until you remove them. If your organization has the Folder sharing option, you can **share Folder items or entire Folders** and manage access. Ask your librarian if the Folder sharing option is enabled for your court.

**A Add Notes (if available).** Click and add up to 4,000 characters.

**B Move, copy or delete Folders.** Click **Actions**. Also **download** the Folder, **rename** it or update all **Shepard's Signal™ indicators**. Add a **permanent link** and return to a folder in one step.

**C Find vital facts across all Folders** and notes. Just enter your search terms, e.g., *front pay*.

**D Use Folder listings/documents.** Check the **box(es)** next to the Folder name(s). Select from the **Delivery icons**, e.g., print. Select the **Move** pull-down menu to **remove** the document from the Folders. Click to move item to the Recycle Bin (see K).

**E Organize Folder documents.** Re-sort by date modified, newest documents, clients, relevance and more.

**F Create a new Folder** or subfolder within a Folder. To create a new Folder, click **My Folders** then the **Create New Folder** button.

**G Move among your Folders.** Just select a Folder link. Click to open levels of subfolders. Each Folder shows how many documents it contains.

**H Share work folders with colleagues** (if available). Quickly access Folders that have been shared within your organization.

**I Click a document listing link** to get the document. Retrieve the document or view the text selection. **Add Notes** (if available) to the listing or **View all** notes for the Folder (not shown).

**J Ensure documents are good law.** See immediately when a document was checked via *Shepard's Signal* indicators. Update if needed.

**K Documents in the Recycle Bin** are saved for 30 days. Click the **Recycle Bin** link to review and restore items.

**L Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them.



# Search Term Maps: visualize your research and assess relevance faster

Lexis Advance® Search Term Maps are included with every Lexis Advance case law search. This proprietary, patent-pending innovation adds unique color coding to your search terms and phrases so you can quickly spot patterns and dense concentrations of terms—even before you review the full text.

## When you view case law research results:

The Search Term Location Bar in search results previews top passages in the document—including in the case summary, headnotes and opinion—so you can quickly determine if you should review the full-text document.

**A** See your color-coded search terms fast.

**B** Move among top search term passages.

Select color markers to view search terms in context. The star indicates the best cluster of search terms. Also click on a text passage to navigate to that passage in the full-text document.

**C** Focus on specific search terms. Select the **Show/hide term highlights** link to select and focus on specific terms. (To turn the display to one color, slide the Multicolor icon toggle.)

**D** Switch between Search Term Maps graphical view and the standard (Full), Title Only view, or Ravel View. To turn off Search Term Maps, click the **More** pull-down menu in the black header at the top of the screen, and then click **Settings**. Under General, un-check the Graphical View box (not shown).

**E** Print/deliver or save results lists.

The screenshot shows search results for 'Cases (757)'. A case titled '1. In re Jordan' is selected, with details: 'United States Bankruptcy Court | 555 B.R. 636 | Jul 01, 2016'. A 'Visualized Terms' dialog box is open, showing selected terms: 'student loan', 'discharge', 'chapter 13', and 'undue hardship'. The dialog includes a 'Multicolor' toggle (checked) and an 'Update' button. Below the dialog, a 'Summary' section shows a color-coded bar and the text: '... 2016 Bankr. LEXIS 3263 July 1, 2016, Decided Confirmation of bankruptcy debtors' Chapter 13 plan was not warranted since the plan improperly proposed to preclude student loan creditors from charging collection fees, late fees, and interest, and the plan'. On the right, there are '4 Citing Decisions' and a 'Most Cited Headnote: Claims Against Debtors'.

## When you view a full-text case:

The Search Term Location Bar in the full-text view displays a complete map of the search terms found in the case.

**A** Hover over color markers or clusters to see which terms are depicted and the location of those terms, e.g., opinion. The best cluster/star indicator also displays. Click on color markers to move to those terms in full text. Or slide the blue scroller to move through the document.

**B** Navigate to specific search terms. Click **All terms**. See your color-coded terms/phrases and how many instances exist within the document. Select a term/phrase, and the Search Term Location Bar highlights that color only (not shown).

**C** Add search words. Click **Search Document** and enter your search terms. All added search words display in teal in your Search Term Location Bar. Click color markers or use the scroller to navigate.

The screenshot shows a full-text case document titled 'Educ. Credit Mgmt. Corp. v. Merzmann (In re Merzmann), 318 B.R. 537 | Court: 10th Circuit Bankruptcy Appellate Panel | Date: December 14, 2004'. At the top, a 'Search Term Location Bar' displays a color-coded map of search terms across the document sections: Summary, Headnotes, Opinion, and Footnotes. A 'Search Document' field is visible. The main text of the document is displayed below, with search terms highlighted in color. On the right, there are navigation options like 'Citing Decisions (2)', 'Cited By (2)', and 'Legal Analytics'.

## Cases: get more than full text

When you view a full-text case, even lengthy cases, you can navigate quickly to the facts you need.

- A** **Search Term Maps** color code your search words and phrases throughout the full-text case. Spot hit patterns and dense concentrations faster than ever before.
- B** **Print, deliver or share.** Also request a printer-friendly version.
- C** **Navigate quickly—anywhere in the document.** The toolbar displays at the top of your document and “floats” with you as you move through the text so you can navigate or work without scrolling back to the top.
  - Go to specific document parts,** e.g., opinion or headnotes. Move among **search terms** or **reporter pages**.
- D** **Create a direct link** to quickly and easily share your full-text document.
- E** **Add more search words.** In the **Search Document** box, enter specific words to further refine your search.
- F** **Move among results documents.** Click **Next document** or **Previous document** arrows. Click **Results list** to return to your last position in the results list.
- G** **Read in full-screen view.** Click the **Reading Mode** icon to remove navigation elements. Enlarge typeface if you choose. Select the **Exit Reading Mode** icon to display navigation again.
- H** **Annotate and save your notes (if available).** The Notes tab displays your personal annotations for fast reference (if annotations are enabled for your account).
- I** **Copy the case citation** for your work. Include parallel citations and a link to the full-text case. Format using a variety of style formats.
- J** **Change pagination.** Select a reporter.
- K** **Link to full-text documents cited.** Just click the link.
- L** **Return to the top of a page,** with a single click. While scrolling, click on the **Back to the Top** arrow.

## Cases: get more than full text (... continued from previous page)

Document: Clouthier v. County of Contra Costa, 591 F.3d 1232 | Actions

Clouthier v. County of Contra Costa, 591 F.3d 1232

United States Court of Appeals for the Ninth Circuit

March 13, 2009. Argued and Submitted, San Francisco, California; January 14, 2010. Filed

Ne. 07-16703

Reporter  
591 F.3d 1232 \* | 2010 U.S. App. LEXIS 884 \*\*

GREGORY CLOUTHIER, ANN CLOUTHIER, individually and on behalf of the Estate of Robert John Clouthier, Plaintiffs Appellants, v. COUNTY OF CONTRA COSTA, WARREN RUFF, MATT FOLEY, Sheriff's Deputy; ERIK STEELE; MARGARET BLUSH, sued in their individual capacities and as employees of Contra Costa County, Defendants-Appellees.

Prior History: [\*1] Appeal from the United States District Court for the Northern District of California, D.C. No. CV-06-03853-MMC. Maxine M. Chesney, District Judge, Presiding. Clouthier v. County of Contra Costa, 2007 J.S. Dist. LEXIS 62552 (N.D. Cal., Aug. 24, 2007)

Disposition: AFFIRMED in part; REVERSED in part; and REMANDED.

Core Terms  
suicidal, mental health, staff inmates, deliberate indifference, detainees, deliberately, substantial risk, Log, County's, constitutional right, serious harm, general population, pretrial detainees, indifferent, district court, custodial, pretrial, training, Red, summary judgment, instructions, cases, cell, genuine issue of material fact, no evidence, conditions, policymakers, detention, employees

Case Summary

Procedural Posture  
Plaintiff parents filed suit under 42 U.S.C.S. § 1983 alleging that defendants, a mental health specialist, two sheriff's deputies, and the County, violated the Fourteenth Amendment due process rights of their son by "aff[er]ing to prevent his suicide while he was in pretrial detention. The United States District Court for the Northern District of California granted summary judgment in favor of defendants and the parents appealed.

Overview  
Viewing the evidence most favorably to the parents, a rational jury could conclude the specialist was on notice of the son's suicidal condition and that she actually inferred from this information the son was at serious risk of harm if he did not receive proper care. In addition to another specialist's notes and personal warnings, which gave rise to the inference that the son faced a **substantial risk** of serious harm, the parents adduced evidence that the specialist actually inferred the son was suicidal. The specialist was not entitled to qualified immunity. The district court did not err in granting summary judgment to the deputies as the parents failed to adduce sufficient evidence to create a genuine issue of material fact as to whether the deputies were deliberately indifferent to a **substantial risk** of

Civil Procedure > Appeals > Summary Judgment Review > Standards of Review >

Summary judgment is reviewed de novo. An appellate court must determine whether there are any genuine issues of material fact and whether the district court correctly applied the relevant substantive law. [More like this Headnote](#)

Shepardize - Narrow by this Headnote (29)

Clouthier into custody for domestic violence. On the date he was taken into the ambulance, he hit his head against the ambulance door. The next morning, July 27, Clouthier was taken to the hospital. At MDF, new detainees fill out a mental health questionnaire. he is interviewed by a member of Contra Costa County's Mental Health Services department, run by administrative director Miles Kramer, works in conjunction with the Sheriff's Department by virtue of a contractual agreement. Mental Health Services provides on-site evaluation, counseling, therapy, suicide prevention, medication management, crisis intervention, and substance abuse counseling, while the Sheriff's Department custodial deputies maintain security and safety in the jail's housing units.

Reason for Shepard's Signal? View the top citing reference

No subsequent appellate history. Prior history available.

Citing Decisions (730)

Warning (1)  
Questioned (4)  
Cautious (14)  
Positive (130)  
Neutral (6)  
Cited By (563)

Other Citing Sources (62)

Shepardize@this document

About This Document

Related Content  
Find references to this case

Related Court Materials  
Briefs (3)

Topic Summaries  
View reports (7)

Legal Issue Trail™ Tips  
Activate Passages

Legal Analytics

Use Lex Machina™ Legal Analytics® to analyze judge behavior. Learn more

Federal Judges (2)  
Frederic Block  
Maxine M. Chesney

Copy (Quick) - Standard (none)  
Copy (Advanced)  
Add to folder  
Add to search  
Annotate  
Highlight

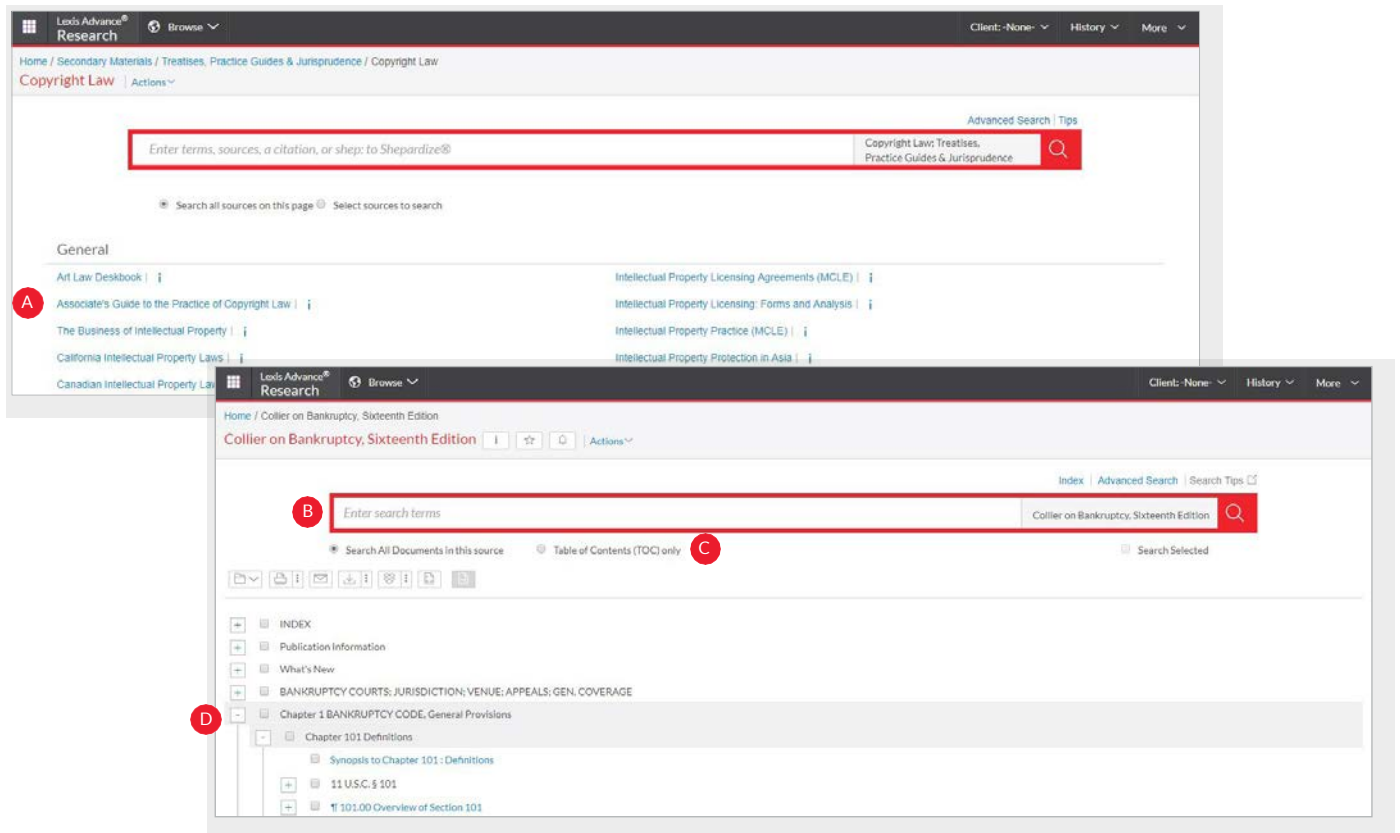
she there are genuine issues of material fact as to whether she was deliberately indifferent to a

Your full-text case at Lexis Advance can quickly lead you to more relevant documents and information. For example:

- A** View the citing reference that had the **strongest influence** on your case's *Shepard's* Signal indicator.
- B** Check the *Shepard's* status immediately. See possible issues and move directly to the *Shepard's* report.
- C** Open the **full Shepard's** report.
- D** Move to other available cases that refer to your case.
- E** Get available **Briefs, Pleadings, Motions** and/or **Dockets** related to your case.
- F** Come up to speed on the legal topics. Find **seminal cases and statutes**, relevant secondary sources and details on burden of proof, review standards, etc. Also find orange **Topic Summaries** links next to LexisNexis headnotes. Click and link to Topic Summary Reports.
- G** Find cases that cite to your case as well as the cases cited in your case—for a **specific legal point of law**. Click **Activate Passages**. Select a highlighted case passage that represents your issue. **Legal Issue Trail™** opens in a new window.
- H** Link to **Lex Machina®** Legal Analytics® charts for judges and law firms. See litigation trends, time to settlement, major client (law firms) and more. View summary charts without a separate LexMachina subscription.\*
- I** Retrieve similar headnotes. More like this Headnote creates a search with headnote language and brings you the results with one click.
- J** See the number of citing decisions related to your headnote. Click **Shepardize® – Narrow by this Headnote** and your *Shepard's* report is automatically focused to your headnote.
- K** Get more detail on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to **search across Lexis Advance** or create an Alert.
- L** Highlight—and use—vital text. (If you have access to folders and annotations) When you highlight text, an options box displays. **Copy (Quick)** lets you select a style format once—and reuse without selecting again. **Copy (Advanced)** opens a new window with added options, including style formats. You can **also annotate and/or save the text to a Folder** (if these features are available to you); search with the selected text; or highlight important passages. Choose your highlight color, which can be changed or kept the same for subsequent highlighted text. Then save the highlighted/annotated document to a Folder (if available).

\*Lex Machina is not available through the Federal Judiciary's national contract with LexisNexis.®

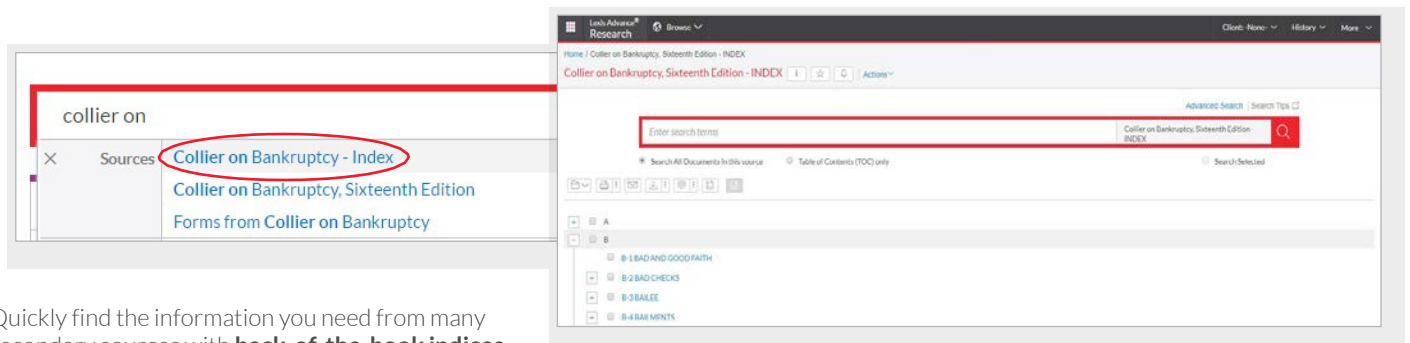
## Tables of Contents (TOCs): search or browse hierarchical sources



TOCs (Tables of Content) sources are available at Lexis Advance for U.S. and state statutes, constitutions, court rules and administrative codes, plus municipal codes and many treatises, guides and form books.

- A** Select a TOC title to open the TOC source, to browse the TOC, search the full TOC or select specific parts of the TOC to search and/or deliver.
- B** Search a TOC. Enter your **search terms** in the Search Box.
- C** Click the radio button to search all documents in the source or search the TOC alone. (Default is to search all full-text documents.)
- D** Browse a TOC. Open and close hierarchy levels. Select the **arrow** to open or close a chapter.

## Indices: search or browse source indices



Quickly find the information you need from many secondary sources with **back-of-the-book indices**.

Source indices display as a separate source in Explore Content, the Search Box (see graphic above left) and the Browse pull-down menu. Indices operate like TOCs. Open and close levels. Search the full index or parts you select. Link directly to the portion of the full-text source that contains your search words. Make part of an index a Favorite source.

# Shepard's Citations Service

- A** See treatment indicators up-front! *Shepard's Signal indicators* show subsequent treatment at a glance.
- B** Navigate quickly to the *Shepard's* report section that generated the signal:
  - [Appellate History](#)
  - subsequent [Citing Decisions](#) (default display)
  - **Other Citing Sources** such as treatises, statutes, regulations, etc.
  - **Table of Authorities**, which shows the cases your case cited and their subsequent treatment
- C** **Set an Alert** and get automatic updates when the *Shepard's* status changes. Even select change type, e.g., negative analysis.
- D** **Get the big picture on citing references.** Click [Grid](#) and see citing references in context over jurisdictions and time.
- E** **Get an overview of subsequent history fast ...** in one sentence.
- F** Move to available **Briefs, Pleadings, Motions** and/or **Dockets** for this case.
- G** **Save, deliver and/or share.** Familiar icons let you save reports to a Folder (if available) or deliver report specifics. Delivery options allow you to deliver the *Shepard's* report, the full text of citing references or both.
- H** **Sort report** results by date, analysis and more.
- I** **Filter citing references to get to vital cases faster.** Refine by specific treatment, specific headnotes, jurisdictions, time frame or depth of discussion. Even search for specific words within your results.
 

Click a filter; **it displays in blue under Narrow By**. Remove the filter; just click the X in the blue box. Select and remove multiple filters.
- J** **See how citing cases** have been treated subsequently by viewing their *Shepard's* Signal indicators.
- K** **Determine how in-depth the citing case** discusses the case you *Shepardized*<sup>™</sup>. The depth of **Discussion** bars show you quickly.
- L** **Find on-point headnote language.** Click a headnote of interest and move to similar language in the citing case.
- M** **Pinpoint a citing case's language.** Get flag colors, a short description, a pinpoint page reference—and the case language in question.
- N** **Review what each signal** indicator means in the *Shepard's* **Legend** at the bottom of the screen.

## Shepard's Graphical: map the appellate history

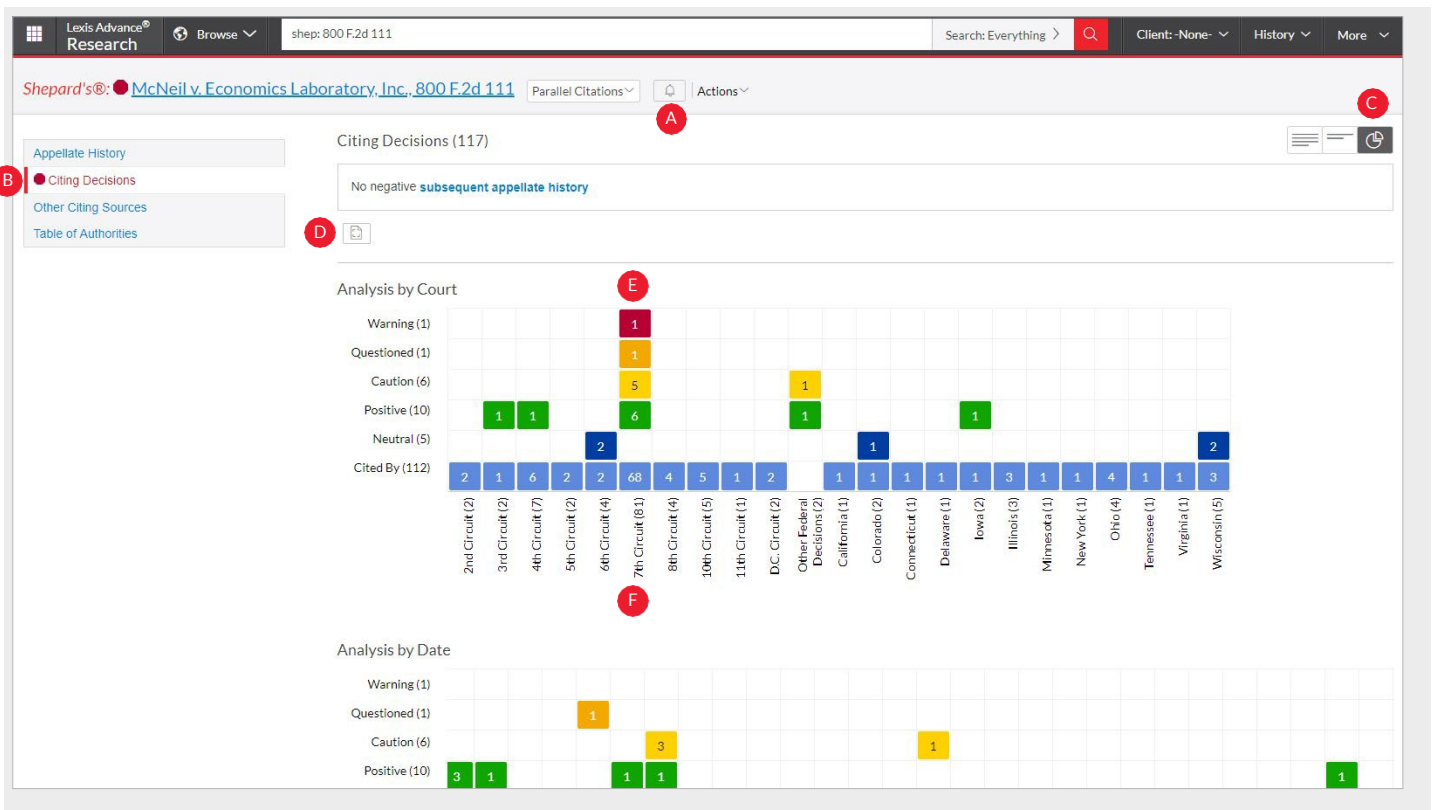
The screenshot shows the Shepard's Graphical interface for the case *McNeil v. Economics Laboratory, Inc.*, 800 F.2d 111. The interface is divided into several sections:

- Top Bar:** Includes the search bar with the text "shep: 800 F.2d 111" and navigation options like "Client: None" and "History".
- Left Panel (A):** Contains the "Appellate History" subtab, which is currently selected. Other options include "Citing Decisions", "Other Citing Sources", and "Table of Authorities".
- Top Right (B):** A "Map View" icon is visible, indicating the current view.
- Map Area (E):** A graphical map of the court system showing the path of the case. The map is divided into three horizontal sections: "U.S. SUPREME COURT" at the top, "FEDERAL INTERMEDIATE COURT OF APPEALS" in the middle, and "FEDERAL TRIAL COURT" at the bottom. A path is shown starting from a point in the Federal Trial Court, moving up to the Federal Intermediate Court of Appeals, and then up to the U.S. Supreme Court. A callout box (G) is positioned over the Federal Intermediate Court of Appeals section, displaying the case name and citation: "Shepardized case Affirmed by McNeil v. Economics Laboratory, Inc., 800 F.2d 111 (August 27, 1986) 7th Cir. Ill.". The callout box also includes "Actions" such as "Open Document" and "Show in list".
- Bottom Right (F):** A set of map navigation icons including zoom in, zoom out, and a search icon.

Get a better understanding of your case's "life cycle" as it traveled over time through different courts.

- A** **View appellate** history in List view. Click the **Appellate History** subtab. A list of references is the default view.
- B** **View the history in a graphical map.** Click the 'Map View' graphical view icon. (The graphical view is shown here.)
- C** **Print your map.** Get a printer-friendly display. Then click the **Print** icon.
- D** **Understand map icons.** Click **Legend**. For example, the circle labels the citation you *Shepardized*.
- E** **Remove map notations,** e.g., indirect history, and redisplay the map.
- F** **Use these three icons** to zoom into the citation you *Shepardized*, move to a full-screen view or expand/contract your view, respectively.
- G** **Review vital cases in the appellate history.** Click a map icon. Then move to the full-text document or the reference in the List view.

## Shepard's Graphical: spot trends in citing references

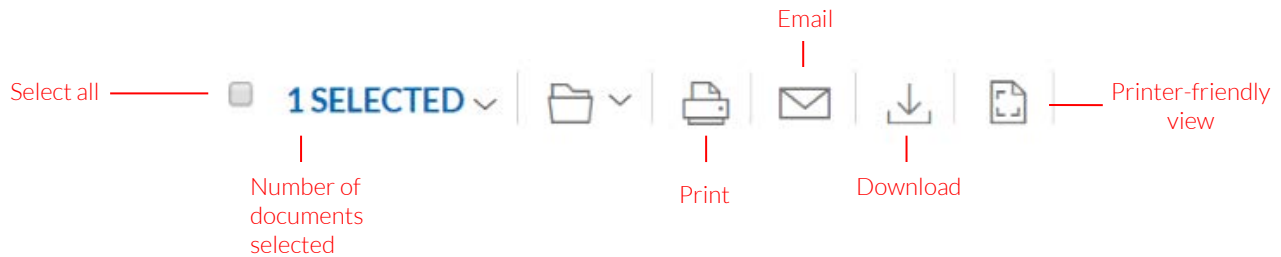


Rarely are cases overruled totally. Points of law within cases may continue to be cited across many jurisdictions. This grid shows you that quickly and effectively.

- A Set an Alert for changes.** Click the icon and request updates on negative analysis, any change or the changes you choose.
  - B View citing references in List view.** Click **Citing Decisions**. The list of citing cases is the default view.
  - C Get the big picture in a graphical grid.** Click the 'Grid View' graphical view icon. (The graphical *Shepard's* citing grid is shown here.)
  - D Print your grid.** Get a printer-friendly display. Then click the **Print** button.
  - E Go to vital references in one step.** Click a grid box and move to those cases in the List view.
  - F Filter by analysis phrase, jurisdiction or year, e.g., click 7<sup>th</sup> Circuit (81),** to view those cases in the Full List view.
- Understand grid components.** Click **Legend** at the top of the graphical Map view (not shown). A Legend is also available at the bottom of the Full and Title List view screens.

## Deliver: print, download and email

Use the same, easy-to-remember delivery icons in the same screen locations across Lexis Advance. Look for these icons at the top of your results lists, TOC pages and full-text documents. (Actual configuration may vary slightly to fit the task. For example, full-text documents won't include the "Select all" boxes. In addition, the folder icon will only be available for users with Folders enabled.)



### Delivery is simple and flexible at Lexis Advance because you can deliver:

- **One or many documents at once.** To deliver:
  - One document: As you view the full text, select the **Delivery** icon. Choose delivery method.
  - Multiple documents: **Select the checkbox(es) next to the document(s)** in a results list, even moving among content types. **Select multiple documents from a TOC display** or a *Shepard's* report. The box shown with the delivery icons keeps count for you. Then select the **Delivery** icon and choose delivery method. **No need to open documents to deliver.**
- **Attachments to documents.** Deliver those valuable attachments, such as PDFs.
- **Lengthy documents fast.** Delivery icons **"float"** and **stay on screen as you scroll lengthy, full-text documents** such as cases or annotated statutes. Deliver quickly—without scrolling back to the top of the screen.
- **More than documents.** Print your results list, Shepard's citing references and lists of your Folder (if you have access to folders) documents or Alert searches. Even deliver your Research History Map! You can also use the **Printer-friendly view** icon and your own device print functions to print your Research History List, *Shepard's* Appellate History Map and *Shepard's* Graphical display of citing references.
- **Printed research from most browsers** like Safari® or Chrome™. No plug-ins are needed.
- **Investigate further—fast—**after you download or email documents, link back to the document at Lexis Advance from the cover page of your document.

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

When you select a **Delivery** icon, deliver using your current/last-used settings. If you click a delivery icon, an option menu displays offering Basic, Formatting and Content-Specific options:



#### Print Options

**Basic:** Include document attachments where available. Select a printer attached to your device. (Install the print/download utility software on initial selection.)

**Formatting:** Select fonts, search terms in bold, exclude cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes. Deliver Case Summaries only.



#### Download options

**Basic:** Send as PDF, .DOCX Even select WordPerfect®-compatible (.WPD). You can group and/or compress files. Select file name and destination.

**Formatting:** Select fonts, search terms in bold, etc., plus cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes.



#### Email Options

**Basic:** Send as PDF, .DOCX, .WPD, group and/or compress files. Add recipient addresses, subject and message.

**Formatting:** Select fonts, search terms in bold, etc., plus cover page and other options.

**Content-Specific:** For example, include headnotes with cases or annotations with statutes.



## Get updates automatically: create an alert



To set up an Alert, look for the Alert “bell” icon. You’ll find it at the top of many screens when you’re conducting tasks that may require updates.

For example, it’s located conveniently at the top of your:

- **Search results screen**
- **Shepard’s report**
- **Topic Summary report**
- **Compare Search Results and Find Similar Documents** results in the Research History Map

This icon also displays when you:

- Display **full-text legislative and regulatory documents**
- **Open the pull-down menu for some publications** listed in [Browse Sources](#)
- Select a **legal topic** in [Browse Topics](#) and on the results screen when you get topic documents

### Select the Alert icon and then choose your update options.

Move through the options screens in seconds, selecting just what you need.

**A Overview Options:** Select an **Alert title**, review/edit search terms, enter a description of your Alert (up to 1,000 characters) and select a client matter (optional).

**B Monitor Options:** Your options mirror your search, e.g., if you searched case law, statutes and web content, **you can include any or all of that content in one Alert update**. For a *Shepard’s Alert*<sup>®</sup>, monitor for all changes, change in *Shepard’s Signal* indicator, negative changes only, changes concerning a specific headnote, etc.

**C Deliver Options:** Select start and end dates, online or email/online delivery, etc. Plus select the update frequency, e.g., daily, business daily, weekly or monthly. Choose the delivery day and time. Or select as updates are available to get Alerts as they are released.

**D Share Options:** Add email addresses so colleagues also receive the Alert updates. (Note: Sharing may not be included with your subscription.) After choosing your options, select **Create Alert**.

(continued on next page ...)

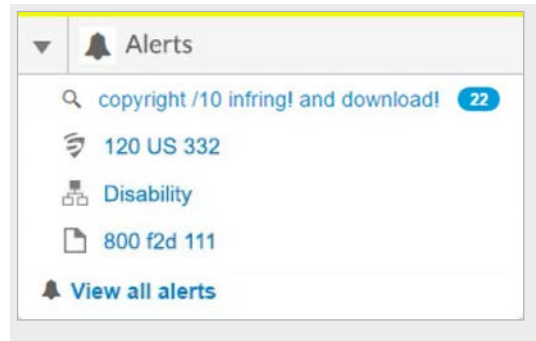
## Get updates automatically: create an alert (... continued from previous page)

### View Alerts results

Email updates come to your inbox. View search terms to determine relevance. Select documents and review and use internal document links to navigate to other relevant documents.

Plus you can view all your Alerts and check for updates from the Lexis Advance home page. Check the Alerts pod. A blue oval icon shows you the number of results documents available for that item.

To view an Alert, select its link from the Alerts pod. Or select **View all alerts** (or Alerts from the More pull-down menu) to move to your Alerts management screen.



### Manage Alerts: edit, delete, pause, etc.

The screenshot shows the Lexis Advance Alerts management interface. At the top, there's a navigation bar with 'Lexis Advance Research' and a search bar. Below that, the 'Alerts (25)' section is visible. On the left, there's a 'Narrow By' sidebar with filters for 'Research', 'Type', 'Client', and 'Delivery type'. The main area displays a list of alerts, each with a title, publication information, client, and frequency. Red callout letters A through E highlight specific features: A points to the 'Search Within Alerts' filter, B points to the selection icons (checkbox, play, pause, delete), C points to the 'More' menu, D points to the 'Edit' and 'Delete' buttons, and E points to the alert title link.

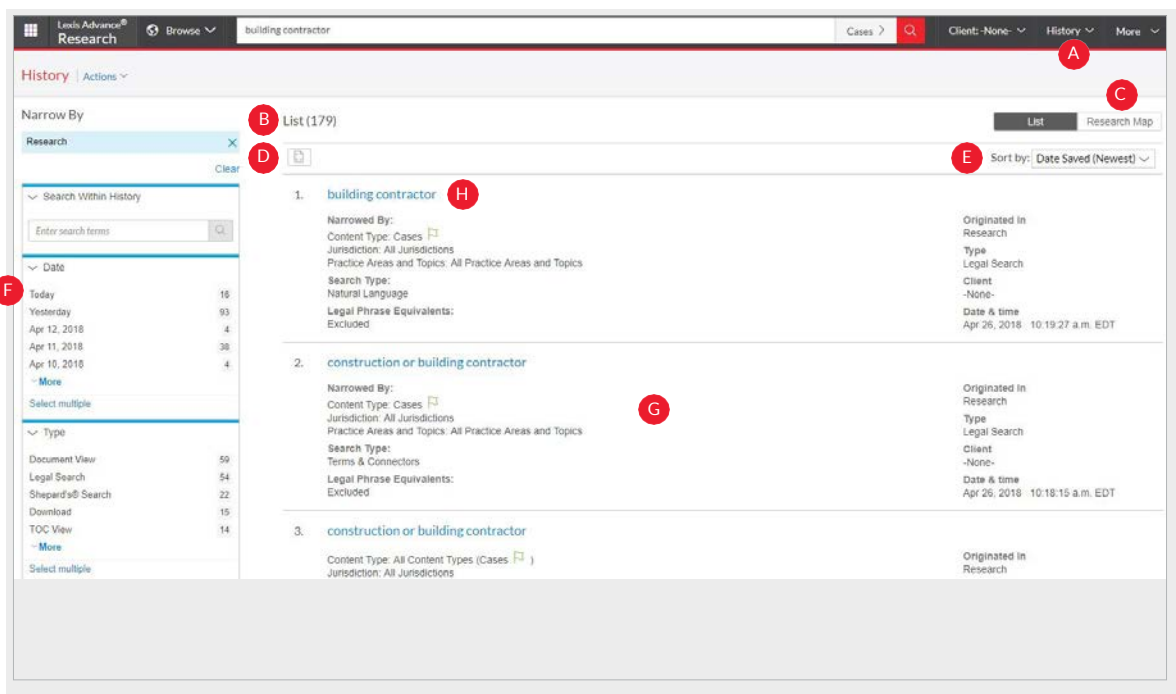
On the Alerts management screen, you can:

- A** Filter results by frequency, client and more, even adding more search words to refine your results.
- B** Use the icons to:
  - Select multiple Alerts for edits
  - Start Alert updates again after pausing
  - Pause the Alert updates
  - Delete the Alert updates
- C** Browse and delete all results quickly. Or keep the results and mark as read.
- D** Edit search terms, change delivery frequency or content and other options.
- E** Move to your search results; select the Alert title link. The content bar (not shown) shows which content has update results. Look for the number of update documents in the blue oval icon.

### Monitor legislation for updates

Select the bell icon as you view a full-text bill. Monitor options let you request updates as the bill passes each step. Or request updates for specific events, e.g., bill is vetoed.

## History: view searches and much more in the list view



**View search history for the past 90 days.** View searches, documents retrieved, *Shepard's* reports, documents delivered (you can quickly re-send them), web-page views, and topic summaries.

**You can view your search history in a list view or as a graphical research map.** *Get interrupted during research?* Pick up where you left off quickly by going to your History. And if Folders are enabled in your court, you can go back to your Search History to save useful searches to your Folders.

- A Return to a search fast.** Select from the five most recent searches or documents from the **History pod** on the landing page. Or click **History** in the black header. Then link to your complete History list by selecting **View all history** (not shown).
- B The List view** is the default view.
- C View your search history** in a graphical map. Click [Research Map](#).
- D Print your history.** Get a printer-friendly list of searches. Then click the **Print** button.
- E Sort your history** by **date saved** (oldest or newest first), **client** number (highest or lowest first), **type** or search **title** (alphabetical or reverse alpha order).
- F Filter history to display** by date or date range, client or task type, e.g., Alerts created, email sent, web searches, legal searches, etc. Only dates with research are included. Just click a date, type, etc.; the filter **displays in blue under Narrow By**. Remove the filter; just click the **X** in the blue box (not shown).
- G See search details up-front.** Each listing tells you so much—content categories, search type, e.g., natural language, search terms, task type and more.
- H Return to your search,** including the pre-search filters you originally chose. Click the search title.

## History: use the map to expand your research

- A** Get a **step-by-step graphical** depiction of your prior research. Click **Research Map** to identify explored versus non-explored paths, possibly uncovering other relevant results.
- B** **Learn more** about map icons and graphical trails.
- C** **Add your HistoryMap** to one of your Folders (if available).
- D** **Share** your History Map via email or download. Request a print.
- E** **Compare 2 – 3 search results** to find common documents—and perhaps expand your research. Click a map search icon and **Select search to compare results**. Repeat. Then click **Compare Search Results**. Your results open in a new window.
- F** **Find similar relevant documents**. Click a document link in your map and **select document to find similar results** (not shown). Then click **Find Similar Documents**. This is a fast way to compare relevant documents to find more, including ones you may not have reviewed yet.
- G** **Filter your map**. Filter by **client**, **date**, etc. Search for **words** included in your map. You can also exclude specific searches, e.g., **trails**, on your map or change the trail order. Click **Reset map to default state** to clear filters.
- H** **Rerun or save your work**. Click a map icon and choose to **rerun** your search or **Save search to folder (if available)**. Even **set up an Alert**.



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Please note: Lexis Advance is continually evolving, so actual screens and features may vary slightly from those displayed here.

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