Omitting a Search: Identify the topic and choose your search terms.

- Click on a Tab to activate the document collection you wish to search. These tabs could represent different sources which could be documents, web data or a variety of other types of information.
- Type your search term or phrase in the field at the top of the window. Then click Search.

Advanced Search

- Click Advanced to the right of the search bar to search for documents using document profile information.
- Type your search term into the field you would like to search by. Then click Search.

Note: You may execute a new search at any time by clicking the Lexis Search Advantage icon at the top of the search page.

Natural Language or Terms and Connectors

Natural Language searches let you enter search terms in plain English, without having to use any special terms or connectors. When you complete a natural language search, Lexis® Search Advantage treats each word in the search phrase as a separate search word, so it looks at all the documents that contain any of the words.

When you place a search phrase inside quotation marks—for example, "asset purchase agreement"—it is treated as a phrase and not as single words. This means you are effectively searching on what is like a single word.

Terms & Connectors allow you to search for documents that contain one or more specific terms. If you want to include more than one search term, you can connect the terms using Boolean operators, such as and, or, not, and so on. These are called connectors. Additionally, you can use wildcard characters to truncate your search terms or find variations on the words for which you are searching.

Ex: recycl! W/25 fast food W/10 container OR package finds documents where either container or package is in the same sentence as fast food, and fast food is in the same paragraph as recycle (or its variants)

Note: If a single term is entered for a profile field search, Lexis Search Advantage automatically adds a wildcard to search for associated variants.

Results Pane: Narrow search results

Results List

Once you’ve entered your search terms and clicked the Search button, Lexis® Search Advantage displays a list of documents that meet your search criteria. It also provides several options for refining, sorting, and reviewing the documents in this list.

Basic information in information is displayed about each document. Some of the information includes the document title, author name, and revision date. Other information may appear, depending on how your firm has configured Lexis® Search Advantage and what type of content you search.

- Sorting When viewing documents in the results list, you can sort the document list by clicking the link for the desired ‘Sort by’ option. This can help locate the documents you are looking for more quickly.
LEXIS SEARCH ADVANTAGE - QUICK REFERENCE

Refine Results Panel
Refine Results Panel offers simple and powerful options for refining your search. You can filter your search using automatically derived categories and entities. These include powerful LexisNexis categorization capabilities such as Legal Topics and Industry taxonomies and legal-oriented entities such as citations, attorneys, judges, law firms, companies, and more.

- Click any topic on which you want to narrow your search. For example, you could expand the Authors attribute and select a particular author to narrow documents that appear in the results list.
- Click show more to view more items in the filter list.
- Type into the box to search for an option not displayed in the list.

Note: Beside each listed value is a number in parentheses, which is the number of documents with that value that were found by the search. To clear a selection, click the X next to the currently applied Refinement.

Web 2.0 Collaborative Features (IDE Edition)
When viewing documents in the results list, you can perform several actions on a document to make that result easier to find in the future, either by yourself or by others within your organization. These features are public and viewable by all.

Rate documents as Best Practice, Click on the star to flag the document as best practice. Ratings can be used to influence relevancy of results, such that higher rated results are returned first, and for sorting results.

Add Tags. Add one or more descriptive tags (usually one word or phrase) that can be used to categorize and retrieve content later. You will see tags for existing documents, as well as the ability to remove your previous tag(s) if applicable. Tags are searchable, and can also be used to refine results.

Add Annotations, Add one or more descriptive comments or annotations about the document. These can be as long as needed to clarify a point of discussion, identify useful ways to reuse the document, or write a review. Comments are searchable, and documents with comments matching the search criteria are considered more relevant.

View the full document
- Click the document title (hyperlink) to display a rendering of the document including Lexis enhancements.

Open the native document
- Click the document icon to view document, in full, in its native format (word, pdf, etc.).

Search History
A dropdown menu of the last 50 searches will be displayed above the Refine Results panel as an option to select from.
LEXIS SEARCH ADVANTAGE - QUICK REFERENCE

Saving Search Queries
Depending on your firm’s configuration, users may have the option to create folders in which they can save refined searches.

- Click Add Folder in the shared folders pane to create a new folder.
- Click Save Query to save your search query into a selected folder.

✓ Full Document View: Work with Citations & Entities
Once you’ve completed your search, you can view each document, in full. When open, you’ll see two scrolling columns of information. The left hand column contains citation and entity information. The right hand column contains the body of the document.

In the rendered view of the document, you will see real-time Shepard’s signals that link directly to the case as well as a list of entities found within the body of your document.

Navigating Citations & Entities
- Use the arrows at the end of the citation or entity to move to the next or previous occurrence of that citation or entity within the document.

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Reviewing Citations & Entities
- Click on hyperlinked citations in the panel or document preview to open the full text of that citation on Lexis Advance.

- Select View Related Documents to link to other documents in your internal collection that reference the citation.
- Click a hyperlinked Attorney, Firm, Company, Organization, or Judge name in the document or left panel to view a menu of options linking that name to related external content.

Click the Email icon. Lexis® Search Advantage opens an e-mail message and adds a link to the document to the message body.

Click the Print icon. A separate browser window appears, showing just a list of the results. You can then use your browser’s print function to print the document.
<table>
<thead>
<tr>
<th>Connector</th>
<th>Syntax</th>
<th>Results</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AND</strong></td>
<td>land trust AND Ohio</td>
<td>Locates documents with the terms <em>land trust</em> and <em>Ohio</em>.</td>
<td>Use <strong>AND</strong> when it doesn’t matter where your search terms appear in a document.</td>
</tr>
<tr>
<td><strong>OR</strong></td>
<td>lawyer OR counsel</td>
<td>Locates documents that either <em>lawyer</em> or <em>counsel</em> or both.</td>
<td>Use the <strong>OR</strong> connector to find documents that contain either or both of the terms or phrases linked by <strong>OR</strong>.</td>
</tr>
<tr>
<td><strong>W/n or /n</strong></td>
<td>airport W/5 noise W/5</td>
<td>Locates documents with <em>airport</em> within five words of <em>noise</em>.</td>
<td>Use the <strong>W/n</strong> connector to find documents with search terms that appear within <em>n</em> words of each other. The value of <em>n</em> can be any number up to 255.</td>
</tr>
<tr>
<td><strong>NOT W/n</strong></td>
<td>rico NOT W/2 puerto</td>
<td>Locates documents in which at least one occurrence of <em>rico</em> is not within <em>2</em> searchable words of <em>puerto</em>.</td>
<td>The second term need not appear in the document at all, but if it does, all occurrences of the second term must be at least <em>n+1</em> searchable words away from at least one occurrence of the first word.</td>
</tr>
<tr>
<td><strong>W/p</strong></td>
<td>rule 11 W/p sanction</td>
<td>Locates Documents where <em>rule</em> within the same paragraph as <em>sanction</em>.</td>
<td>You use the <strong>W/p</strong> or <strong>/p</strong> connectors interchangeably to find documents with search terms that appear within the same paragraph. You can also use <strong>W/p</strong> when you want your search terms to have a general relationship to each other.</td>
</tr>
<tr>
<td><strong>NOT w/p</strong></td>
<td>cable NOT W/P television</td>
<td>Locates documents in which at least one occurrence of <em>cable</em> appears in a paragraph that does not contain <em>television</em>.</td>
<td>The <strong>NOT W/P</strong> connector finds documents in which at least one occurrence of the first search term appears in a paragraph that does not contain the second term. The second term need not be in the document at all, but if it is, all occurrences of the second term must be in different paragraphs than at least one occurrence of the first term.</td>
</tr>
<tr>
<td><strong>PRE/n</strong></td>
<td>pay PRE/3 television</td>
<td>Locates documents in which <em>pay</em> precedes <em>television</em> by three or fewer words.</td>
<td>Use the <strong>PRE/n</strong> connector to find documents in which the first search term precedes the second by no more than the stated number of words. As with <strong>W/n</strong>, both words must be in the same segment.</td>
</tr>
<tr>
<td><strong>W/seg</strong></td>
<td>tax! W/SEG unitary</td>
<td>Locates documents in which <em>opec</em> and <em>gasoline</em> are in the same segment.</td>
<td>Terms joined with <strong>W/seg</strong> can occur together in any segment.</td>
</tr>
<tr>
<td><strong>NOT W/seg</strong></td>
<td>tank NOT W/SEG m1</td>
<td>Locates documents in which there is at least one segment with the term <em>tank</em> but not the term <em>m1</em>.</td>
<td>The <strong>NOT W/seg</strong> connector finds documents that have at least one segment in which the first search term appears, but not the other search term.</td>
</tr>
<tr>
<td><strong>W/s</strong></td>
<td>sanction W/s frivolous /s frivolous</td>
<td>Locates documents with <em>sanction</em> within the same sentence as <em>frivolous</em>.</td>
<td>Use the <strong>W/s</strong> connector to find documents with search terms that appear within the same sentence. You can also use <strong>W/s</strong> when you want a close relationship between terms without specifying an exact proximity.</td>
</tr>
<tr>
<td><strong>NOT W/s</strong></td>
<td>market NOT W/S share</td>
<td>Locates documents that have at least one occurrence of <em>market</em> in a sentence that has no occurrences of the term <em>share</em>.</td>
<td>The <strong>NOT W/S</strong> connector finds documents in which at least one occurrence of the first search term appears in a sentence that does not contain the second term. The second term need not be in the document at all, but if it is, all occurrences of the second term must be in different sentences than at least one occurrence of the first word.</td>
</tr>
<tr>
<td><strong>AND NOT</strong></td>
<td>trust AND NOT charitable</td>
<td>Locates documents where the term <em>trust</em> occurs but the word <em>charitable</em> does not.</td>
<td>Use the <strong>AND NOT</strong> connector to find documents in which a search term or phrase is to be excluded.</td>
</tr>
<tr>
<td><strong>! (wildcard)</strong></td>
<td>recycl</td>
<td><strong>recycl</strong> locates documents with <em>recycle</em>, <em>recycling</em>, and <em>recyclable</em>.</td>
<td>Finds a root word plus all the words made by adding letters to the end of it.</td>
</tr>
<tr>
<td>*** (wildcard)**</td>
<td>bernst**n</td>
<td><strong>bernst</strong> finds the ei and the ie spelling of the name.</td>
<td>Holds one space for a character at any point in a term.</td>
</tr>
</tbody>
</table>

Lexis® Search Advantage considers the following characters non-searchable: . , ' “ ( ) ] ] { } ~ ! ` $ # @ % ^ & * = + / < > and <space>
Viewing Lexis Search Advantage results within Lexis Advance

When running a search in Lexis Advance, users have the option of viewing search results within their own firm’s documents with the Lexis Search Advantage integration.

My Firm Category

When running a search in Lexis Advance, you can view search results within your company’s documents using the “My Firm” category.

- Initiate a search in the Lexis Advance® online application.
- A list of results is displayed to the right while a list of categories to refine by will be displayed to left.
- Select ‘More Categories’ in the left pane.
- Scroll the bottom where you will find a category for your firm’s documents.
  Note: The category name is customizable and will be different for each firm.
- Clicking on this category will display matching search results from documents found in Lexis Search Advantage. From here you can also sort, refine those results using LSA refinements, without leaving Lexis Advance. Users can also view in its native format or view the document within Lexis Search Advantage.
Citation Scorecards

When viewing Lexis Search advantage documents within Lexis Advance a Citation Scorecard is available in the footer of each result which gives a summary of the citations found in your document.

- Click on a Shepard’s signal category to get a listing of each citation in that category.
  - Click on the individual citation to view the full case in Lexis advance
  - Click on the Shepard’s signal to view the Shepard’s report in Lexis Advance.

Cited By Summary

When viewing case results within Lexis Advance, any cases also cited by documents found in Lexis Search Advantage will be displayed in the result footer.

- Initiate a search in the Lexis Advance® online application.
- Select the Cases Category
- Results will be displayed and any cases that are also cited in Lexis Search Advantage will contain a summary in the footer of the result.
  
  Note: The name referenced is customizable and will be different for each firm.

- Click on View the documents to see LSA search results in Lexis Advance