

# The research tasks you do most: Here's how at Lexis®



## Easy step-by-step guidance for common tasks

Many of your favorite research tasks—those tasks you rely on to get to the information you need—can be completed on the Lexis® service in a couple of steps. Try them out.

### Search

-  Start searching with the source combination you want
-  Search a specific source
-  Combine sources/search favorite sources
-  Search with “terms and connectors”
-  Search within specific document parts
-  Search specific jurisdictions, content types, practice areas, etc.
-  Find the most important cases in results
-  Build your search with a simple screen form
-  Assess case relevance—in color!
-  Ask Lexis Answers™ a question

### Find in one step

-  Retrieve full-text documents by citation
-  Request a *Shepard's*® report
-  Retrieve a full-text case by name
-  Find litigation documents related to your case

### Browse by hierarchy

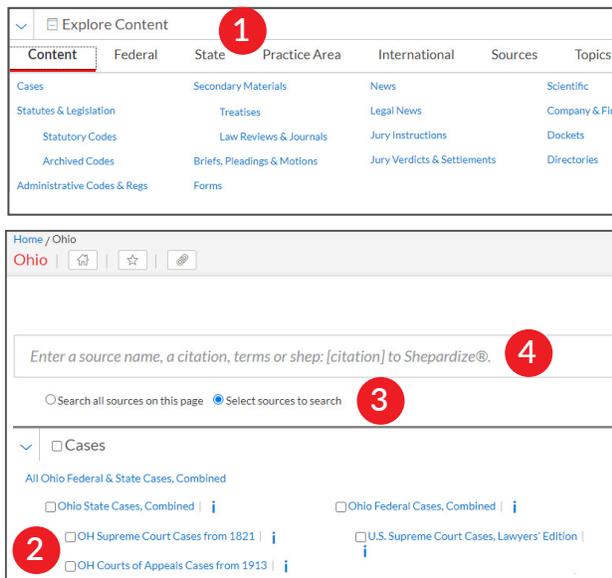
-  Browse or search a table of contents (TOC)
-  Browse statutes
- Research legal topics**
-  Research a specific legal topic (Browse Topics)
-  Find more relevant headnotes
- HN** Use LexisNexis® headnotes to find documents
-  Focus *Shepard's* reports to specific headnotes

### Using/delivering results

-  Refine your search results
-  Search within results/move to specific terms
-  Copy cites and text for your work
-  Annotate results documents
-  Print, email, download and save to folders



### Start searching with the source combination you want



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

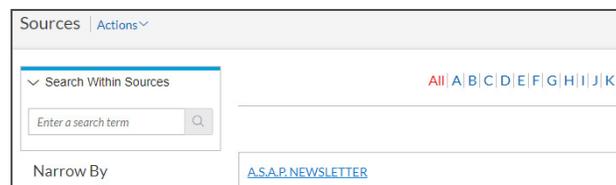
- 1 Choose a tab, e.g., State. (Content Type is the default view.) **Select a Source Type.**
- 2 Click through the source hierarchy screens.
- 3 Select a source and move to the Advanced Search form for that content type. Or *search all sources* on the screen displayed (default option).  
*To choose multiple sources, click the **Select sources to search** radio button, then select source checkboxes. To make your combination a Favorite, click the **star** next to **Clear**. (Not shown.)*
- 4 The Search Box shows your choices when you select multiple sources. When you're ready, enter your search words and search.

### Search a specific source

If you know the source: Enter a partial title in the Search Box, which makes source suggestions. Select the magnifying glass icon next to the title to add that title to the Search Box. Select the title name and move to the Advanced Search form for that content or to the Table of Contents.

You can also browse and search sources:

1. Select the **Sources** tab in Explore Content. Enter a partial title in the **Search for a Source** search box.
2. Or select **View All Sources**. The screen below displays.



3. Browse titles alphabetically, by content types, jurisdictions, etc.
4. Select a **title link** and move to the Advanced Search form for that content type.  
To select all sources on the Sources screen, click the **Add All These as Search Filters** button (not shown).

### Combine Sources/search favorite sources

**To combine sources:**

1. Enter a **partial source** name in the Search Box. The word wheel will make suggestions. Select the **magnifying glass icon** next to the title to add that title to the Search Box.
2. Repeat to add more sources to your search.

**View and create Favorites:**

**To create a Favorite:** Select the star next to the title combination. The item will then remain in Favorites on the Lexis home page.

**To view Favorites:** Select the Favorites pull-down menu on the Lexis home page. You can also create Favorites in the Explore Content feature. (See left, item 3.)



## Search with terms and connectors

Search for

same sex! w/10 marriage

Just enter your words and connectors in the Search Box, e.g., *same sex! W/10 marriage*, and select the **red magnifying glass Search** button (not shown). Lexis automatically interprets search commands such as ! to truncate words and W/n, OR, AND, &, etc. For help selecting connectors, click **Advanced Search** below the Search Box.

Please note: Lexis ignores certain “noise words,” e.g., of, the, an, etc., in your query but counts these noise words when **determining the proximity of terms** in a document. So broaden your proximity connectors.

## Search within specific document parts

You can use Advanced Search forms to search document segments, i.e., specific document parts. Segment fields are provided automatically.

### Common case-law segment searches

- NAME(*roe AND wade*)
- JUDGES(*merz*) OR JUDGES(*michael W/2 merz*)
- WRITTENBY(*merz*)
- ATTORNEY(*paul W/2 stewart*)

### Common news segment searches

- HEADLINE(*oil AND domestic*)
- HLEAD(*george W/2 soros*) finds terms in the headline and/or lead paragraph
- PUBLICATION(*wall street journal*)
- SECTION(*financ!*) & *bitcoin*

## Search specific jurisdictions, content types, practice areas, etc.

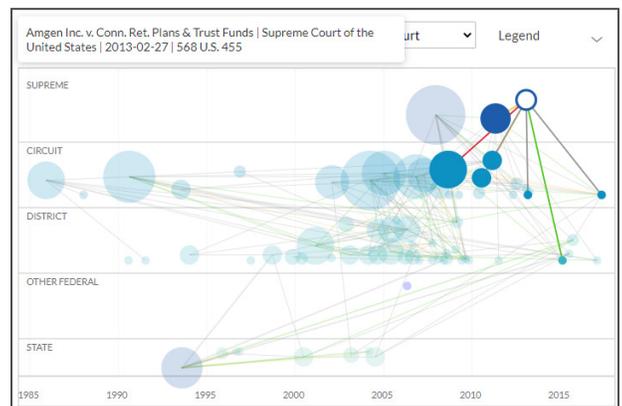
Use Explore Content on the Lexis home page to choose sources or refine your search by **Content Type**; **Federal**, **State** or **International** jurisdiction; or **Practice Area** or **Industry**. For example, if you need to search for case law in Arizona, go to the **State** tab and select **Arizona**.

Explore Content	
Content	State
Alabama	Guam
Alaska	Hawaii
Arizona	Idaho
Arkansas	Illinois
California	Indiana

**Lexis Practice Centers** offer more than 70 practice areas, industries and jurisdictions with links to the most-used practice content from across the LexisNexis services. Most state pages are Practice Centers. Also check for Practice Centers in the Practice Area tab on Explore Content.

## Find the most important cases in results

**Ravel™ View** helps you pinpoint the cases your case results cite most often. Find key cases and cases you may have overlooked. To display the Ravel View map, select the Ravel View display icon.



Ravel View displays your top 75 case results. Each circle represents a case. The larger the circle, the more the case has been cited. Click a circle to view that case’s connections to other cases in your results. (See screen above.) Connecting lines show you the *Shepard’s* treatments, e.g., red for warning. Then select a citing case to view the reason for the treatment. (Not shown.) To clear your selection, click anywhere on the map outside of the case circles.



## Build your search with a simple screen form

Use **Advanced Search** forms to build your search. Select a source title link from the Search Box suggestions and move to the Advanced Search form for that content type automatically. You can also select a form by choosing the Advanced Search link below the Search Box. Each form automatically displays segment options, i.e., the parts of the document, for that content type.

## Assess case relevance—in color!

**Search Term Maps** at Lexis automatically **color code your search words** and phrases. Every Lexis case you retrieve is then mapped with Search Term Location Bars so you can **spot term patterns and the densest concentrations** of search hits faster.

In search results, **preview top passages** in the document opinion, headnotes and more. (See graphic below.)

In full-text cases, see a **complete map** of search terms found.

Terms: Opinion

... , a necessary element of his discrimination c  
the division's determination that a certain level  
an essential function of the job of a **fire fighter**.  
enable Carleton to meet the **hearing** standard  
**accommodation** because it would force the di  
The judge further analyzed Carleton's claims u

[View this passage in full document](#)

Click a color marker or cluster of markers on the Search Term Location Bar to move to those search terms in the full text.

## Ask Lexis Answers™ a question

The powerful machine-learning technology behind Lexis Answers understands your questions and provides 1) a concise, authoritative overview (“answer card”) and 2) search results from across your Lexis subscription.

Enter your query in the Lexis search box:

To find **judge information**, Enter: *judge <add judge name>*

To find **expert information**, Enter: *expert <add expert name>*

You can also get Lexis Answer results for legal issues: **definitions; elements of; standards of review; burdens of proof; legal doctrines; and statutes of limitations**. Just start entering your legal issue in the Lexis search box and select the appropriate question. For example, enter: *breach of contract* and select one of the suggested questions.

Search for

breach of contract

Documents

- measures on economic remedies for breach and termination of employment contract
- reply of the state administration of taxation (sat) to the collection of individual income tax (iti) on the compensation payment for the **breach of contract** arising from the individual's equity transfer
- official reply for approval of hu shen 300 stock index futures contract of china financial futures exchange and of amendment of the transaction rules and measures for disposal of violation and breach
- Benech v. **Breach of Contract** Thomas B Hazuka, 2008 Cal. Super. LEXIS 10875
- Breach of Contract** S. Colo. Orthopaedic Clinic SPO v. Weinstein, 2013 Colo. Dist. LEXIS 171

Legal Phrases

- breach of contract**
- breach of contract elements
- breach of contract damages
- breach of contract claim
- breach of contract complaint

Suggested

- What are the elements of **breach of contract**?

Questions

- What is the definition of **breach of contract**?
- What is the burden of proof for **breach of contract**?
- What is the statute of limitations for **breach of contract**?
- What is the burden of proof for **breach of contract damages**?



## Find in one step

### Retrieve full-text documents by citation

Enter the citation(s) in the Search Box and click Search. For example, Enter:

- 29 cal 4th 262
- 289 f3d 865
- 2004 WL 6075307
- 107 pl 204
- 116 stat 745
- 2002 enacted hr 3763
- orc ann 2901.05
- 15 uscs @1117, 15 uscs @1127
- 75 fr 66832
- 29 cfr 1630.2
- 521 us 591

Enter an **internal cite** (e.g., pinpoint cite) for a case or statute and retrieve the full-text document—open to the requested page or section—as well as documents that reference the full-text case or statute citation. For example, Enter: 42 uscs@4577(c).

**Not sure of the citation format?** Click the **Get a Doc Assistance** link below the Search Box.

- **By Citation:** This tab offers nearly 40 content forms, including secondary sources, verdicts, briefs and more. Select a Content Type and/or Jurisdiction. Select a citation format link.
- **Cases by Party Name:** For cases only. At this tab, enter one or more party names and jurisdiction. Even select date ranges.
- **Case by Docket Number:** For cases only. At this tab, enter a docket number (formatting assistance is available) and a jurisdiction. Date options are also available.

### Request a Shepard's Report

Enter **shep:** then the citation in the Search Box, e.g., Enter: *shep:800 f2d 111* then **Search**.

To *Shepardize*® the full-text case you are viewing, click the **Shepardize® this document** link in the *Shepard's* Preview box on right side of the screen.

Find the citing text that had the strongest influence on the overall *Shepard's* Signal™ indicator. Just click **View the top citing reference**.

### Retrieve a full-text case by name

The Lexis Search Box suggests the names and citations of **cases** and many **U.S. Public Laws** and **popular state laws**. If you begin to enter party names or a statute name, the search box will make suggestions automatically, e.g., Enter: *roe v wade*. You can also find cases by searching with the NAME segment. Enter: *NAME (roe and wade)*.

### Find litigation documents related to your case

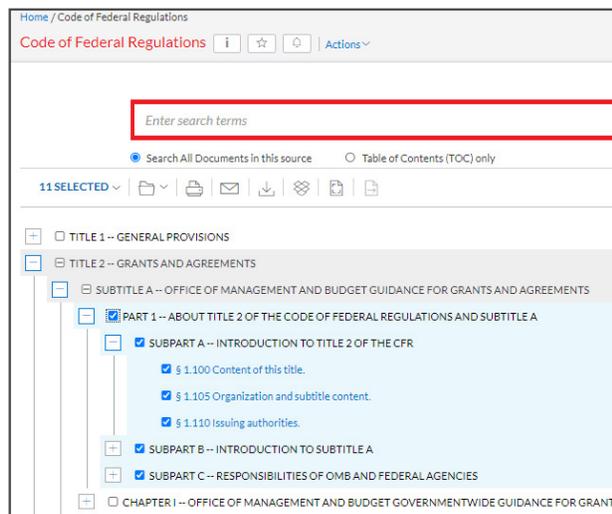
As you view your full-text U.S. or state case, related Briefs, Pleadings, Motions and Dockets will display via link in the **About This Document** box. Select a content link, e.g., click **Briefs (4)**, to move to a results list of four briefs. Review the documents, look for specific words or filter by attorney, law firm and more.



## Browse by hierarchy

### Browse or search a table of contents (TOC)

TOCs are available for U.S. and state statutes, constitutions, court rules and administrative codes, plus municipal codes and many treatises, guides and form books.



#### Gain access to a TOC several ways:

1. Enter the TOC source name in the Search Box and select the source title's link.
2. Identify your TOC source in Explore Content and click the source name link.
3. Click the source's View Table of Contents link in your search results.
4. Click the source's View Table of Contents link from your Favorites.

**To browse a TOC:** Open and close hierarchy levels. Select **+** to open, **-** to close.

Select a **blue document link**, e.g., **1.100 Content of this title**, to open a full-text section. To return to the TOC, select the **Table of Contents** tab on the left side of the full-text document.

**To search a TOC:** You can search the **TOC only** or **Search All Documents in this source**. Make your selection with the radio buttons beneath the Search Box. (The default is to search all source documents.)

Enter your **search terms** in the Search Box at the top of the open TOC, e.g., Enter: "executive order" and click **Search**.

If you search the TOC only, your results will be a subset of the TOC.

If you search source documents, your results screen will look like other Lexis search results, e.g., you can apply post-search filters (see page 8), re-sort results documents and more.

**To search or deliver specific portions of the TOC**, e.g., all the documents in a chapter or part, select the check box in front of that part or chapter. The Search Selected button under the search box is chosen automatically (not shown in the graphic, left), and the delivery tray shows how many individual documents you will search or deliver.

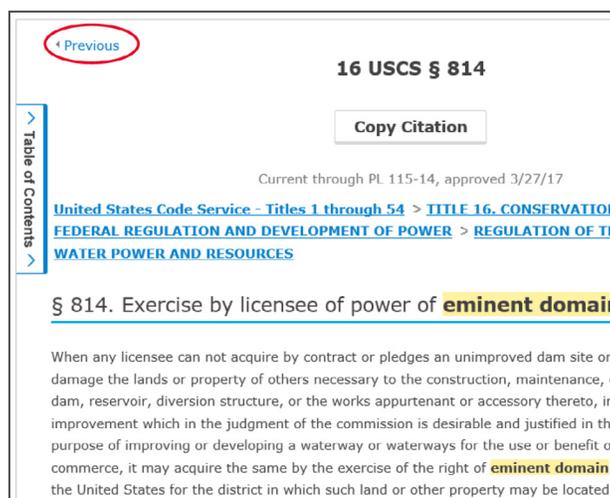
To deliver those documents, select a **delivery icon**.

To search the selected documents, Enter your search and click the **red magnifying glass** button.

Open relevant documents or browse surrounding levels. Your search terms are highlighted in yellow. To return to the TOC, select **Edit Search**.

### Browse statutes

**Move to preceding or succeeding sections.** Click the **Previous** or **Next** (not shown) arrows at the top or bottom of the screens. To move to a **TOC level**, you can select a level from the **hierarchical links** at the top of the document. Or click the **Table of Contents** tab on the left side of the document.



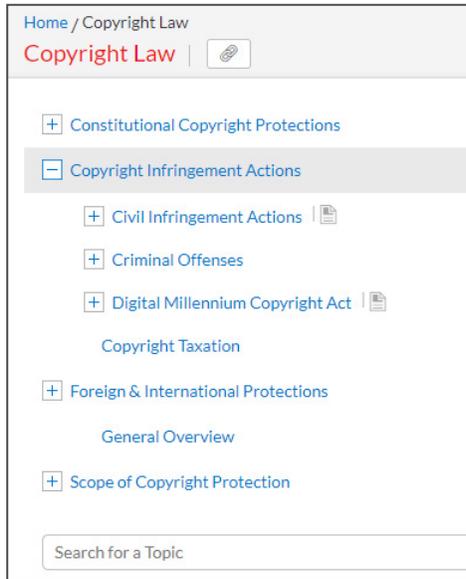


## Research legal topics



### Research a specific legal topic

You can search for your topic or browse a topic hierarchy.



Get case results on your topic, statutes—and results from across your Lexis subscription. Click a report icon and view. **To search for your topic:** Enter your search words in the box, e.g., Enter: *business interruption*, and click **Search**.

#### To browse for your topic:

1. Select an area of law, e.g., Copyright Law.
2. Select **+** to open subtopics. Click **-** to close.
3. Select a topic link. Get case results on your topic, statutes—and results from across your Lexis subscription. Click a report icon and **view topic summary reports**, compiled by LexisNexis legal editors, pointing you to seminal cases and other vital authority, key definitions and more.

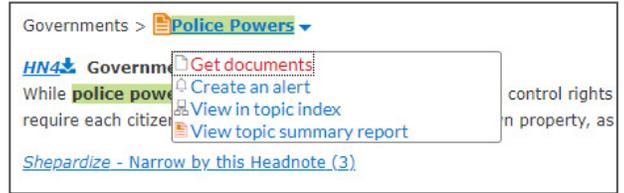


### Find more relevant headnotes

If you find a relevant headnote in a full-text case, use the **More like this Headnote** feature to retrieve similar LexisNexis headnotes. As you view the relevant headnote in the full-text case, click the **More like this Headnote** link. (See graphic right.) Your results list of cases, ordered by headnote relevance, highlights compatible headnote text for quick review.

## HN Use LexisNexis® headnotes to find documents

Find the LexisNexis headnote you want to explore in a full-text case.



1. Select a topic link in the headnote, e.g., Police Powers.
2. Click **Get documents**. Your results documents are sorted by relevance with the Case content tab displaying.
3. Refine. Add filters, e.g., select a court. Or Search within results, i.e., add search words to describe your issue or fact pattern.

Topic Summary reports, discussed at left, also point you to relevant authority in addition to topic definitions and secondary sources. Click the **View topic summary report** link.

To get new documents on your topic—automatically delivered via email—click the **Create an alert** link. You can get new cases, codes, regulations and administrative materials, briefs and pleadings—new jury verdicts, settlements and news, etc.



### Focus Shepard's reports to specific headnotes

If you are reviewing a *Shepard's* report, use a headnote filter, e.g., *HN6*, from the left-hand navigation pane. If you are viewing the headnotes of a full-text case, just **Shepardize - Narrow by this Headnote** in the case's headnotes. Even see how many citing references are available for that headnote. Select a specific *Shepard's* Signal indicator to view your *Shepard's* report focused to that specific headnote and that specific editorial treatment.





## Using/delivering results

### Refine your search results

#### Refine by content category

Review just cases or codes, etc. Change content tops at the top of your screen.

#### Check results numbers

See how many results for most content types. Determine what to view first and/or how to refine.

Select Category	308	Results
Cases	308	
Cases		308
Statutes and Legislation		576
Secondary Materials		405
Administrative Materials		19
Briefs, Pleadings and Motions		420
Administrative Codes and Regulations		9
Forms		1
News		Get
Legal News		124
Dockets		Get
Jury Verdicts and Settlements		27
Jury Instructions		14
Expert Witness Materials		6
Company and Financial		Get
Directories		14
Scientific		1
Intellectual Property		0

Refine by adding search words in the **Search Within Results** box in the pane. Enter your search terms, e.g., Enter: *social host*.

To remove the additional search words, **click the X** next to the displayed words.

Filters
▼

Search Within Results
▼

Q

> Court

> Timeline

#### Refine by adding filters

You can filter only one content category at a time. **Select a filter** to apply it to your results,

All court and jurisdiction filters are in alphanumeric order. Use **+** to add and **-** to close levels.

To add multiple filters at once, e.g., several jurisdictions, use the checkboxes next to filters to select them. The blue Filter box keeps count even if you close a filter category. To remove a filter, click the X on that filter, displayed at the top of your screen.

Filters
2
▼

> Search Within Results

▼ Court
 2

Preferred Courts ( Edit )

---

Federal

45

+
 1st Circuit

1

-
 2nd Circuit

10

2nd Cir. - Ct. of App.

1

+
 2nd Cir. - U.S. Dist. Cts.

9

+
 3rd Circuit

5

+
 4th Circuit

2

+
 5th Circuit

5

▼ More

State Courts

262

+
 Alabama

3

+
 Alaska

8

+
 Arizona
 

4

+
 Arkansas
 

2

+
 California
 

2

### Search within results/move to specific terms

Search within full-text results documents. Enter terms, phrases and commands in an expandable, in-document search box. Then navigate easily to any or all of your term and phrase hits. While viewing a full-text document within your results, click **Search Document** to display the in-document search box. Enter your search terms and go.

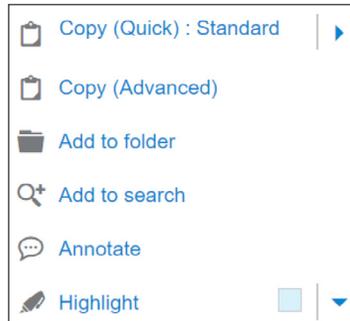


## Copy cites and text for your work

**Copy citations**, including parallel cites for cases and links to the full-text document. Just select the **Copy Citation** link at the top of the full-text case, statutory and administrative code/regulation or secondary source.

**Copy text and citation:** Highlight the text you need. An option box displays. Click **Copy (Advanced)**.

For case citation and copy attribution, select a frequently used citation style (format) once, and it remains for your next clip. Or you can change and select from a variety of style formats.



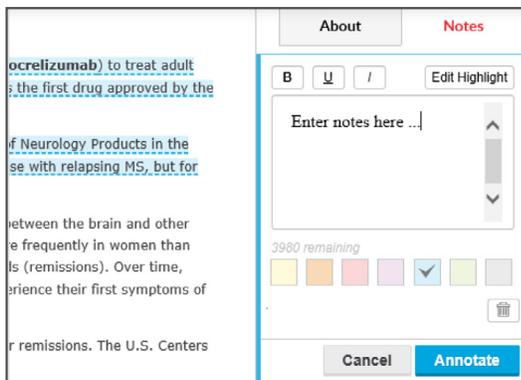
You can also choose to include parallel cites and a link to the document.



## Annotate results documents

Highlight and annotate text in all document types, even news.

**Select text** in your document and **click Annotate** from the options box that displays. Add your notes in the annotation box, choose a highlighting color and click the blue **Annotate** button.

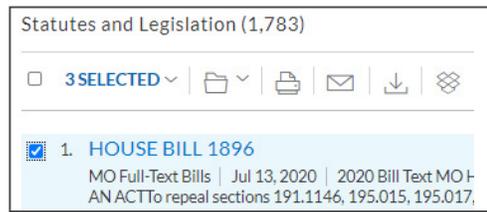


Your annotations are available in the **Notes** tab in the right margin of your document. You can return to edit or delete annotations. You must save the document to a work folder to save the annotations.

Highlighting and annotations are included when you deliver, e.g., print, the documents. Links to annotations are included at the bottom of documents delivered via PDF.



## Print, email, download and save to folders



Deliver a **single document** as you view the full text. Deliver **one or more documents** from the results list—even across content categories. **Select the checkbox** next to each document you need. The blue text keeps count. You can deliver 100 full-text documents or up to 250 entries from the first 1,000 entries on the results list.

Select from the Delivery icons on your full-text document or your results screen:

**Save to a folder:** Options help you select a folder, save the document(s), searches (with filters) or results list(s), and add notes to preface the document(s).

**Print:** Select the **Print** icon to choose options, e.g., to format (fonts, search terms in bold, etc.), show headnotes in cases, etc.

**Email:** Options let you format (.PDF, .Docx) and add recipient addresses, subject and message. Also send to LexisNexis® CaseMap® case analysis software or compress (.zip) files.

**Download or send to Dropbox®:** Download or send to Dropbox as .Docx, .WP or .PDF. You can download to multiple Dropbox accounts. Deliver the results list. Even send as multiple, zipped files. If downloading, you can also send to CaseMap®.

Please note: If you do not see the Dropbox icon in your delivery options (shown above), check with your Lexis account administrator or your LexisNexis representative.

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