



# Nexis® User Guide

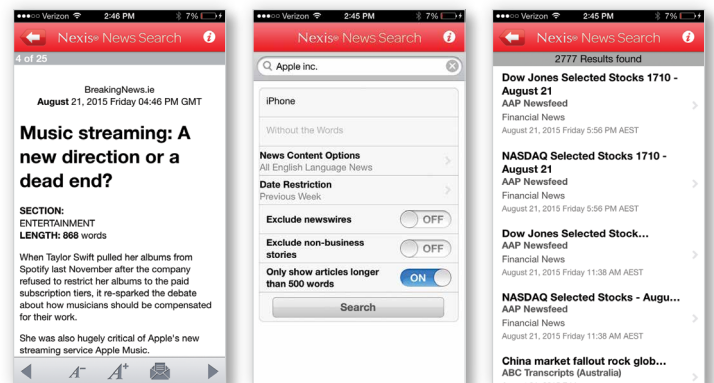
## Sign In

Go to the global login page at <http://www.nexis.com>

The screenshot shows the Nexis Sign In page. At the top, there is a language selection bar with 'View in: English (US)' highlighted, followed by links for English (UK), Deutsch, Español, Français, Nederlands, Português, and Русский. Below this, the 'Sign In' heading is followed by a 'Help' link. The main form consists of an 'ID' field (callout 2) and a 'Password' field. Below the password field is a 'Sign In' button (callout 4) and a 'Remember Me' checkbox (callout 3). To the right of the form is a large illustration of a woman in a business suit pointing at a screen with various business icons like a bar chart, pie chart, and airplane. Below the form, there are links for 'Forgot your ID' and 'Forgot your Password', and sections for 'Enterprise Sign-in' and 'Academic Sign-in'. At the bottom left, there is contact information for customer support in the US and UK, and a 'More' link. At the bottom right, there are three circular icons: a green wrench for 'SUPPORT RESOURCES', a red play button for 'HOW-TO VIDEO', and a purple target for 'NOT A NEXIS USER'.

- 1 Choose the language you prefer to use within the Nexis interface. Based on your selection, region-specific customer support options will appear within the top navigation after login.
- 2 Enter your Nexis® user ID and password.
- 3 Check the **Remember Me** box to save your password & ID for seamless login.
- 4 Click **Sign In**.

**TIP:** Now, Nexis users can search the LexisNexis® news collection via the Nexis News Search iPhone® and iPad® application or the Nexis News Search mobile site at [www.lexisnexis.com/nexisnews](http://www.lexisnexis.com/nexisnews)



The screenshot shows the LexisNexis Research Dashboard interface. Numbered callouts identify key features: 1. LexisNexis Services dropdown menu; 2. Language Preferences, My Documents, Settings, and Sign-Out links; 3. Help link; 4. Search, Sources, Alerts & History tabs; 5. Home tab; 6. Alerts section with a search bar containing 'adidas AND nike shoes' and a dropdown menu; 7. Saved Searches section; 8. Recent Searches section; 9. Recent Documents section. The dashboard also includes sections for Available Alerts, My Analysis, and a message about no alerts existing at the time.

## Navigating in Nexis

- 1 Access other LexisNexis products and services via the drop down menu in the top left navigation bar.
- 2 The **Language Preferences**, **My Documents**, **Settings** and **Sign-Out** links are located in the top right navigation bar.
- 3 Find Support Options through the **Help** link in the top right corner. Region-specific customer support options are displayed in the top right corner based on the preferred language selected at sign in.
- 4 The available search tabs are specific to your Nexis subscription.
- 5 The **Home tab** is your default start page with Quick Search, Alerts, Recent Documents and Recent/Saved searches widgets.

## Search

Once signed in, you can customize your default homepage to any of the search forms under the **My Settings** link in the top right corner.

**TIP:** If you would like to change your default start page to another search form, click on the **Make this my start page** link in the top right corner of the page.

## Research Dashboard

On the home page, you will also find a Research Dashboard containing your favorite and recent research activities. This page contains:

- 6 Up to 8 of the most recent **alerts**.  
A blue circle beside the Alert name indicates if alert results are available.
- 7 Up to 8 of your **saved searches**.  
You can execute the saved search by clicking on the search name.
- 8 Up to 8 of your **recent searches**.  
You can re-execute a recent search by clicking on the link.
- 9 **Documents you recently viewed**.  
You can re-open the document by clicking on the document title.

The screenshot shows the LexisNexis Quick Search interface. At the top, there's a navigation bar with links like 'What's New', 'English (US)', 'My Documents', 'Project: None', 'My Settings', 'Contact Us', 'Help', and 'Sign Out'. Below this is the 'Nexis' logo and a search bar. The search bar contains the text 'adidas AND nike shoes'. A dropdown menu for the search bar shows options like 'News; Company; Market Insight; Biographical; Legal; Filter by'. A red box highlights the search bar and the dropdown menu. Below the search bar, there's a 'Boolean Guide' section with options like 'AND Both terms', 'OR One of the terms', and 'AND NOT Exclude following terms'. A red box highlights this section. To the left of the search bar, there's a sidebar with 'Alerts' and 'Available Alerts' sections. Below the search bar, there's a 'Results (131)' section. A red box highlights the 'Results (131)' section. Below the results section, there's a 'Narrow By' section with various filters like 'All available dates', 'News', 'Company', 'Market Insight', 'Biographical', 'Legal', and 'Save these settings for my next searches'. A red box highlights the 'Narrow By' section. The interface also includes sections for 'Automotive', 'Energy', 'Recent Searches', and 'Recent Documents'.

**1** On the home page, you will find a **Quick Search** option, offering a search experience to complement the existing search forms available for your use. Use Quick Search if you need a **broad orientation on an entity or topic** and you are not sure where to start.

You can **search across multiple content types with a single action**. The Quick Search features the widest set of content for news, company information, market insight, biographies and global legal sources, together in one search request.

**2** Use the **Quick Search Boolean Guide** to select the appropriate connectors for your search.

**3** Your results are **organized by content type** so that you can easily check for relevant information within each content type. Each content type will run **up to 60,000 results** and return the 3,000 newest (News) or most relevant (other content types) documents.

**4** Quick Search provides a **list of filters** that you can apply before the search.

**5** If you tend to use the **same filters** repeatedly then click '**Save these settings for my next searches**' at the bottom of the filter area.

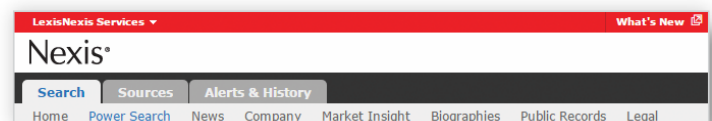


## Power Search

Use **Power Search** to search across all content source types, construct precise queries or use LexisNexis SmartIndexing Technology™ in your search.

The screenshot shows the LexisNexis Power Search interface. The top navigation bar includes links for Home, Power Search, News, Company, Market Insight, Biographies, Public Records, and Legal. The main search area is titled 'Power Search' and has two radio buttons: 'Terms and Connectors' (selected) and 'Natural Language'. A large search box is labeled with a red circle '1'. Below the search box is a date range selector with a dropdown menu set to 'Previous week', and a calendar icon. A red circle '2' points to the date range input fields showing 'From 01/17/2017 To 01/24/2017'. Below the date range is a dropdown menu for source selection, currently set to 'All Company Information (Excluding D&B)', with a red circle '3' pointing to it. At the bottom, there is a section for 'Add Index Terms' with a text input field and a red circle '4' pointing to it. A sidebar on the left contains 'Related Searches' (Power Search, Easy Search™), 'My Favorite Search Forms' (Power Search, News, Company Profiles, Market Insight, Biographies), and 'Useful Links' (New sources, Searchable Directory of Online Sources, Industry Classifications look up & Currency Converter, Help me build a search). A 'View tutorials' link is also present. On the right, a calendar for July 2015 is displayed, and a dropdown menu for 'Favorite Sources' is open, showing a list of sources including 'All News, All Languages', 'US Publications', 'English Language News', 'French Language News', 'WebNews - all languages', 'Major World Publications (English)', 'German Language News', 'US Newspapers and Wires', 'All Non-English Language News', 'All Company Information (Excluding D&B)', 'U.S. Company Reports', 'D&B Duns Market Identifiers Plus (US)', 'ABI INFORM', and 'Industry Reports & Analysis'. A 'Recent Sources' section at the bottom of the dropdown shows 'BBC Monitoring: International Reports'.

- 1 Power Search allows you to search using “Terms and Connectors” (Boolean logic) or “Natural Language.” Choose your preference at the top of the form. Enter keywords or phrases into the search box.
- 2 Select a time period from the drop down list or define a specific date range using the calendar feature to narrow the scope of your search.
- 3 Select a popular source group or one of your pre-selected Favorite Sources from the drop down list or select a single source or group file from the **More Sources** link. Begin typing a source, group file or topic to see suggestions for related sources.
  - a. To change the Sources displayed, select **Edit this List** in the drop down list.
- 4 Click **Add Index Terms** to use LexisNexis SmartIndexing Technology™ to refine your search by adding subjects or themes to your entered search terms. Begin typing a keyword to see suggestions for related index terms.



**TIP:** Switch to different search forms using the links along the top of the Search tab.

## LexisNexis SmartIndexing Technology™

Construct more precise searches with LexisNexis SmartIndexing Technology™, a proprietary, rule-based, classification system applied to all documents within the Nexis® database. Use this advanced search technology to locate documents containing specific themes or subjects. LexisNexis SmartIndexing Technology subject terms include:

- Companies
- Industries
- Subjects
- Geographic Areas
- People

**Add Topics** [Help](#)

↓ To improve your results, select LexisNexis® Index Terms to add to your search.

Look-Up Options: ☒ Find ☐ Hierarchy ☐ Alphabet Change Index: All terms ▼

Find Terms: Containing

**How This Works:**

1. Select from the drop-down list.
2. Enter a word or phrase to find the appropriate term to add to your search. Use connectors (AND, OR, AND NOT) to show relation of terms (e.g., apple AND orange). When searching for people using "exactly matching" or "starting with", enter the name as "Last Name, First Name", making sure you use a comma.
3. Click the Find button.

**1** Click the **Add Index Terms** link to utilize subject terms. Enter a keyword in the box. The Index Term Word Wheel will automatically show terms related to that keyword.

**2** Use the **Advanced Index-Term Lookup** to browse all subject terms or drill down by hierarchy.

**Add Index Terms**

Advanced index term look-up

- ☐ Group duplicates
- ☐ Exclude Newswires
- ☐ Exclude Non-business news (obituaries, sports, reports, etc.)
- ☐ Exclude Websites
- ☐ Exclude documents with fewer than 500 words
- ☐ Search specific document sections

**Add Index Terms**

- Health & Welfare Funds**
- Health Care Information Technology**
- Health Information Exchange**
- Health Food Stores**
- Health Care Facilities**
- Health Care Overview**
- Health Care Industry Trends**

## Sources

Source selection allows you to quickly find the sources you need, and create custom source sets for any particular research project.\*

The screenshot shows the LexisNexis web interface. At the top is a navigation bar with 'Search', 'Sources', and 'Alerts & History' tabs. Below this is a 'Browse Sources' section with filters for 'By' (Publication Type, News & Business Topics, Industry, Area of Law), 'Filter by' (Country, Topics, Language), and 'Active Sources Only'. A 'Find Sources' modal window is open, showing search criteria like 'Keyword' (e.g., 'New York Times') and various category checkboxes. To the right, a 'Selected Sources' list is shown with a 'Save as a favorite' button and an 'OK - Continue' button. Numbered callouts indicate: 1. Clicking the 'Sources' tab and selecting 'Browse Sources' or 'Find Sources'; 2. Selecting a source and checking the 'Save as a favorite' box; 3. Clicking the 'OK - Continue' button; 4. The 'Find Sources' tab being highlighted.

- 1 Click on the **Sources** tab and select either **Browse Sources** or **Find Sources**.
  - The **Find Sources** tab allows you to search for sources of interest—using publication name subject, media type, language and/or geography.
  - The **Browse Sources** tab allows you to browse sources—using publication name, subject, media type, language and/or geography.


- 2 To select a source, check the box next to the publication name or group file name. Once selected, it will appear in the **Selected Sources**. Customize the name under which the group of sources will appear in the drop down list.
- 3 After selecting your preferred sources, you can choose to **Save as a favorite** by checking the box above Selected Sources. Customize the name under which the group of sources will appear in the drop down list.
- 4 Click the **OK-Continue** button and you will return to the Power Search form where you will see the sources in the drop down list.

\*Not all sources can be combined

**TIP:** The **Find Sources** tab is best if you know all or part of the source name you are looking for, or if you would like to check to see if a source is available.

**TIP:** The **Browse Sources** tab is best if you'd like topic suggestions and want to take the guesswork out of finding appropriate sources.

The screenshot shows the 'Source Information' page for 'Healthcare Executive'. It includes details such as 'COVERAGE: From January/February 2001 through current', 'COVERAGE-TYPE: Full-text', 'FREQUENCY: Bimonthly', 'UPDATE-SCHEDULE: Updated regularly - Atypical update schedule/as received from the vendor', 'LANGUAGE: English', and 'CONTENT-SUMMARY: Access to certain freelance articles and other features within this publication (i.e. photographs, classifieds, etc...) may not be available. Certain freelance articles previously available have been removed by LexisNexis pursuant to the Publisher's directions. PROQUEST INFORMATION AND LEARNING COMPANY MAKES NO WARRANTY REGARDING THE ACCURACY, COMPLETENESS OR TIMELINESS OF THE LICENSED MATERIALS OR ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, AND SHALL NOT BE LIABLE FOR DAMAGES OF ANY KIND OR LOST PROFITS OR OTHER CLAIMS RELATED TO THE LICENSED MATERIALS OR THEIR USE. Healthcare Executive focuses on a single critical management issue, such as human resources, physician roles, governance, technology, information systems, and career planning. PUBLISHER: ProQuest Information and Learning Company'.

**TIP:** For information about a source or group of sources click the  icon adjoining a source name.

## Results Page

The screenshot shows the LexisNexis search results page. At the top, there's a navigation bar with 'LexisNexis Services', 'What's New', 'English (US)', 'My Documents (0)', 'Project: None', 'My Settings', 'Contact Us', 'Help', and 'Sign Out'. Below this is the 'Nexis' logo and 'Customer Support: 1 800 543 6862 or 1 937 859 5398'. The main header has 'Search', 'Sources', and 'Alerts & History' tabs. The search results are for 'adidas AND nike shoes'. On the left, there's a 'Narrow By' section with a 'Search Within Results' box and a list of filters: News (1770), Company, Market Insight, Biographical, and Legal. Below this is a 'Group Duplicates' section and a 'Source Type' filter. The main results list shows four items: 1. 'Stock Review: Footlocker increases 7.0%' (News Bites US Markets, 14477 words, 10 hits, January 24, 2017), 2. 'PG1: Nike Curbs Competitor Momentum With Paul George Signature Shoe' (Benzinga, 380 words, January 10, 2017), 3. 'City & Country: Selling luxury and affordable luxury' (The Edge Malaysia, 1900 words, 2 hits, January 09, 2017), and 4. 'Help find suspect in armed robbery of Greenville W...' (CBS - 7 WSPA, 7 WSPA (Greenville-Spartanburg, South Carolina), NEWS, WSPA Staff). A preview pane on the right shows the full text of the first result, 'Stock Review: Footlocker increases 7.0%'. Red circles 1-4 highlight key features: 1. Filter categories, 2. Search within results box, 3. Preview icon, and 4. Permalink icon.

- 1 From the results page, quickly filter, results by selecting one or multiple categories.
  - To remove a filter, select the 'x' on that filter's button.
  - Use the Search within results box to narrow your results to documents that contain or do not contain your search phrase.
- 2 Use the drill-down list in the left navigation to narrow results by:
  - Source Type
  - Language
  - Company
  - Source
  - Subject
  - People
  - Website
  - Industry
  - Geography
- 3 Click the **Preview** icon to see the full text of news articles and the first 500 words for other content types in a split-screen preview pane without leaving your results.
- 4 Permalinking allows users, with one-click, to create a direct link to search queries and documents. These links allow anyone with a Nexis or NexisDirect ID to execute a shared search query or referenced document. Click the to share your search queries and documents.

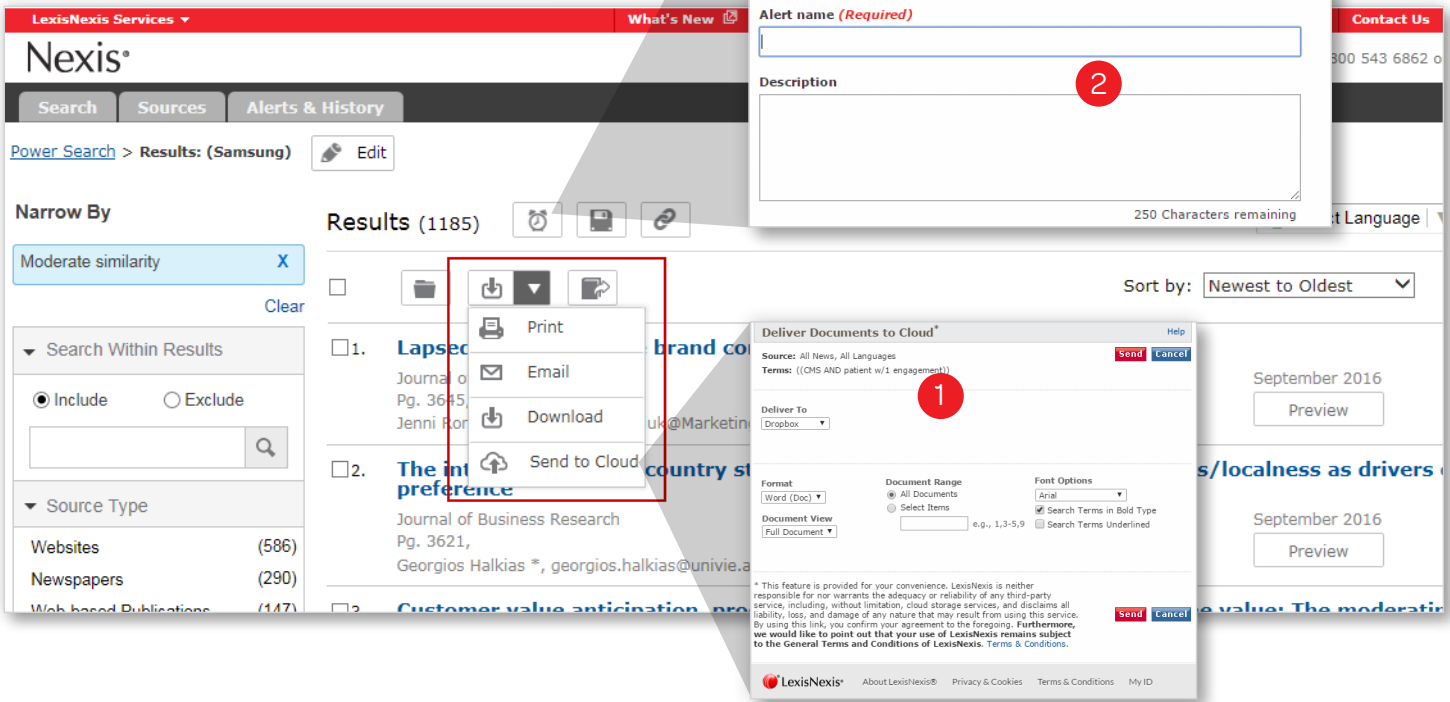
The screenshot shows the NewsBites preview pane. It displays the full text of the article 'Stock Review: Footlocker increases 7.0%'. The article is from News Bites US Markets, dated January 24, 2017 Tuesday. The length is 14477 words. The article is an American Daily Stock Report. The dateline is 24 January 2017. The article text reads: 'Footlocker Inc. (NYSE:FL), NYSE's 13th largest Retailing company by market cap, has increased \$US4.53 (or 7.0%) in the trailing 12 months to January 23, 2017 to close at \$US68.79. Compared with the S&P 500 Index which has risen 18.8% over the same period, this is a relative price change of -11.8%. Average daily volume of 2.3 million shares in the trailing year was 1.2 times average daily volume in the previous year. In the trailing 12 months the market cap has jumped \$US243.8 million.' Below this is a section for 'DIRECTORS OPTION BUYING' mentioning Alan D. Feldman, and a section for 'FOOTLOCKER DIVIDENDS' mentioning a dividend of 27.50c per share payable on October 28. At the bottom, there is a section for 'UPCOMING EVENT: DIVIDEND' and a 'Go to full document' button.

**TIP:** In addition to licensed content, Nexis aggregates 1,000+ respected open-Web sources, vetted by LexisNexis editors for industry relevance and expertise. In the results list, Web-News articles are identified by the icon.



## Delivery Options

Save and share results in several ways:  
download, send to the Cloud, email, or print.



1 To save or share an entire results list, select a delivery option at the top of the results page. The following immediate delivery options are available:

- Print options include adding a brief note, cover or end page; document views; and font options.
- Download results to a Microsoft® Word or Microsoft® Excel document or HTML, Text, PDF, HTML or Rich Text Format (RTF).
- Email documents to three email addresses using semicolons (;) to separate each one.
- Download to Cloud allows you to save the file in PDF, HTML, Microsoft® Word, or RTF format to your Dropbox™, Google Drive™, Microsoft® OneDrive and BOX™ account.

Alternatively use the My Documents folder, where you can compile documents from various searches to save or share together. The My Documents folder holds up to 500 documents for 30 days.


- To add a document to the folder, click the **Add to My Documents** folder icon.
- Click on the **My Documents** link in the top right corner to manage, sort, download and share your saved documents.

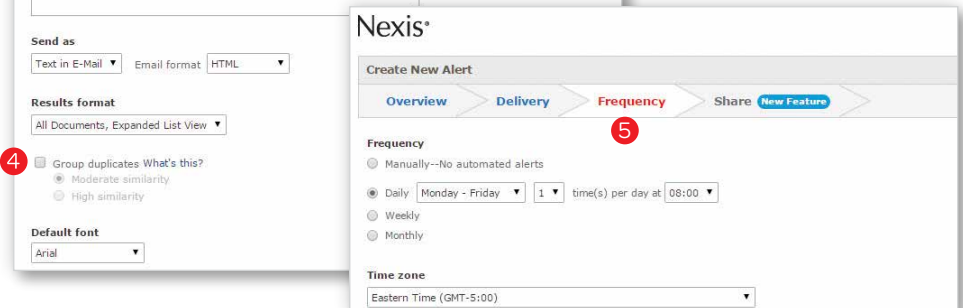
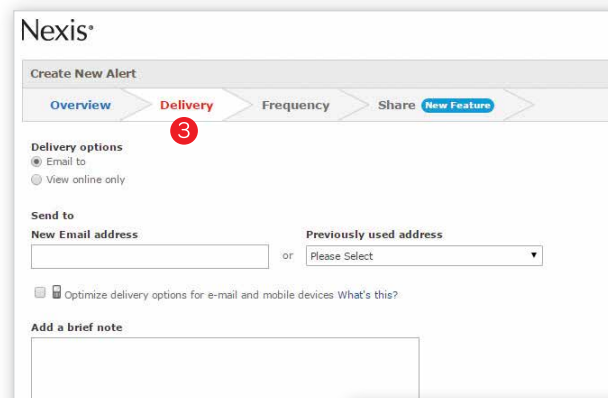
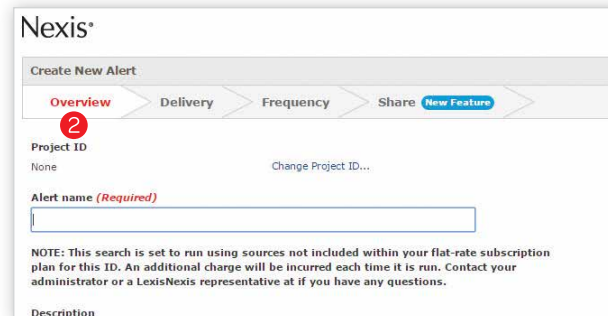
2 Create an alert for continuous updates on a search via email. Continue reading for more details on setting up alerts.

**TIP:** Click **Link to this search** to create a direct link to any query or document allowing your colleagues to execute searches and access documents.

## Setting Up Alerts

Stay current on critical changes to your important research issues by setting up alerts to provide continuous updates on topics of interest online or via email.

- 1 After running a Nexis search, simply click the **Create an Alert** icon  to schedule automatic updates.
- 2 Select the Overview tab. Enter the **Alert name**. You may also add a Project ID or Description.
- 3 Select the **Delivery** tab. Choose from among various options.
- 4 Reduce repetitive documents by selecting the **Group duplicates** option. Deduplication is now available for your Alerts. Because this option reduces duplicative results, your Alert emails will be shorter and easier to scan. If you previously selected the Group duplicates at the Search or Results steps, you don't need to take any further action—deduplication will be automatically applied for your Alerts.
- 5 Select the **Frequency** of Alert updates.
- 6 Select the **Share** tab to allow your colleagues to subscribe to your Alert.
- 7 Specify who can see your Alert. To make your Alert visible to a colleague, you must click the button **Share the Alert** so that other users in your account can access and subscribe to it.



## My Alerts & History

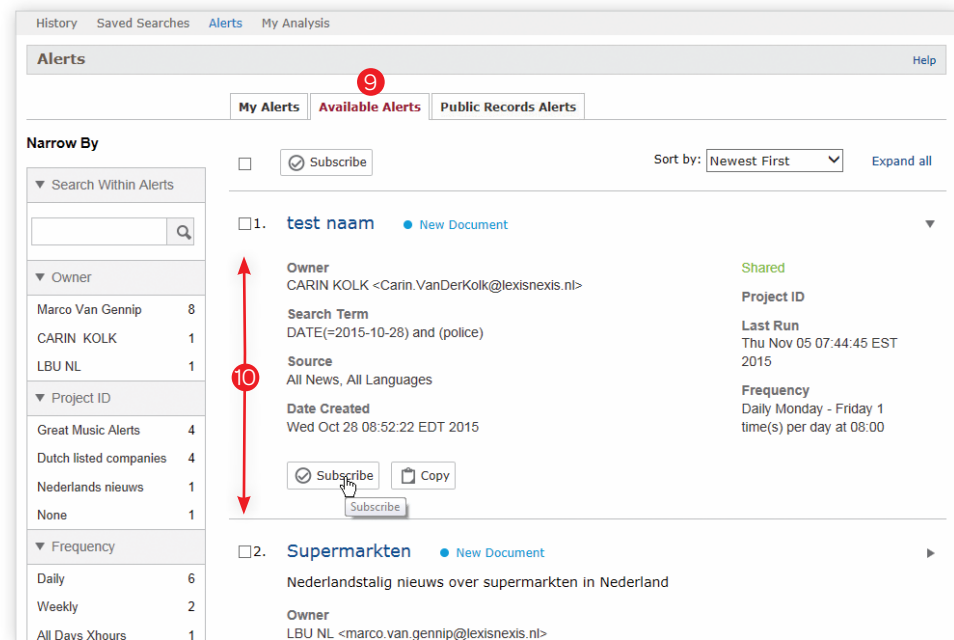
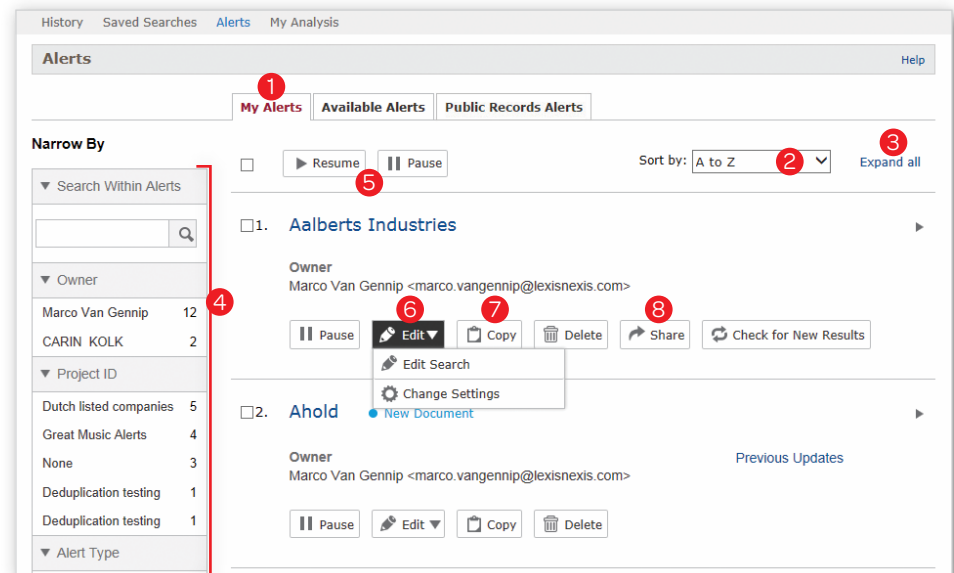
The **My Alerts** hub provides many details at-a-glance so you can efficiently manage all the Alerts that you have created or subscribed to.

- 1 Click on the **My Alerts** tab.
- 2 **Sort** your results to show either newest or oldest results first.
- 3 **Expand** or **Collapse** the views of your Alerts. In Expanded mode, you can view more details of your Alert, such as search, source, format and status.
- 4 Filter your results within the **Narrow By** area. **Search Within Alerts** enables you to search by a keyword. Apply filters to limit your results to an Owner, a Project ID, or the Frequency of an Alert.
- 5 Easily **Pause** or **Resume** your Alerts. Avoid in-box overload when you are out of the office.
- 6 **Edit** your Alert frequency or settings.
- 7 Quickly **Copy** an Alert as a template for creating a new Alert.
- 8 **Share** Alerts with your colleagues in the same Nexis account. Make your Alert visible to colleagues by clicking on the 'Share' button. Users will need to opt-in to subscribe to your Alerts.

## Available Alerts

The **Available Alerts** tab shows Alerts that your colleagues have opted to share.

- 9 Click on the **Available Alerts** tab to view Alerts created by others within your Nexis account.
- 10 **Subscribe** to an Alert by checking the box.



Visit our LexisNexis user site at [lexisnexis.com/bis-user-information](https://www.lexisnexis.com/bis-user-information) for tips, training, self-paced online tutorials, printed literature, contact information and more.

**Customer Support: 800.543.6862**