Lexis Advance® Quick Reference: Research

Welcome to Lexis Advance®

designed to transform the way you conduct legal research

Lexis Advance Quick Reference shows you where to find—and how to use—Lexis Advance features common to your research sessions. Keep this guide handy for reference.

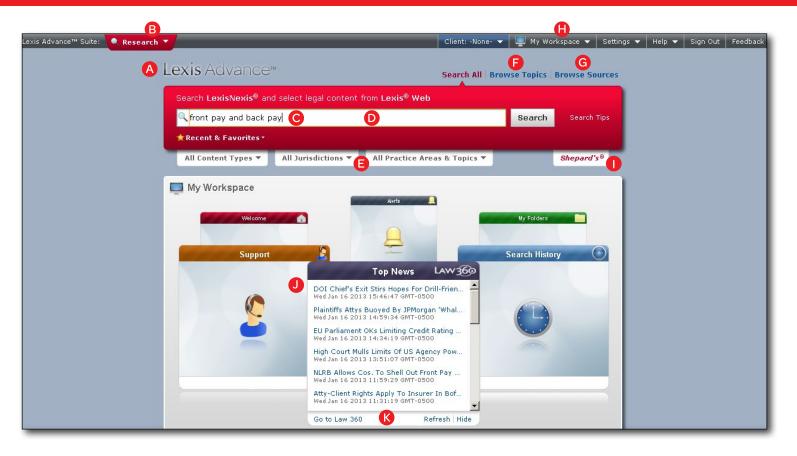


Download more Lexis Advance literature, helpful videos, Webinars and more ...

The <u>Lexis Advance Resource Center</u> offers all of this and more. Find quick tips for getting the most value from Lexis Advance, and learn about upcoming Webinars and Lexis Advance enhancements.



START YOUR SEARCH (HOME PAGE)

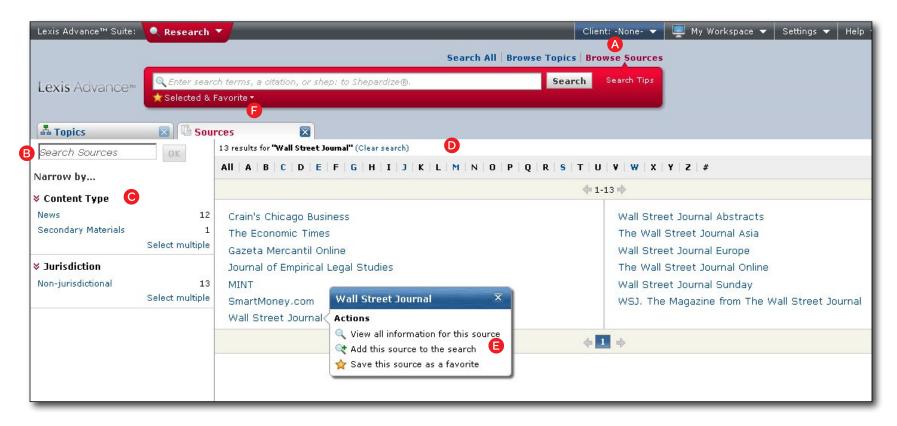


- A Return to this home page. Click the Lexis Advance logo on any screen page.
- B Find more products such as LexisNexis® Verdict & Settlement Analyzer or LexisNexis® Profile Suite. Launch a product from the Experience Bar and utilize features such as Work Folders, Alerts and History for those products too.
- **©** Enter your search words—no source selection needed. (Even get term suggestions as you type.) Then click **Search**.
- Enter a citation or popular statute name to retrieve the full-text document as well as search results for that citation.
- **E** Filter your search by content, jurisdiction, and/or practice area or topic. Or search broadly here, then filter your results from the results page.
- **Browse or search legal topics.** Click <u>Browse Topics</u>. Drill down through the legal topic hierarchy or search for topics.

- **G** Browse sources allows you <u>find specific sources</u> and save them as favorites.
- Navigate easily. These pull-down boxes display on most Lexis Advance screens. Use My Workspace to go to Work folders, Research History and Alerts in one step. Use Client to change/edit client matter IDs, and Settings to change search preferences..
- Request a Shepard's® report. Click this tab to populate the search box with shep:. Enter your citation and click Search.
- Fast access to what you're working on. Just click a My Workspace carousel panel. Move to vital work—your Alerts, your recent searches, your Work Folders— as well as helpful resources like top news from Law360® and Customer Support information.
- **View Current Law360 Legal News!** Click a link and move to a Law360 window.

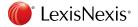


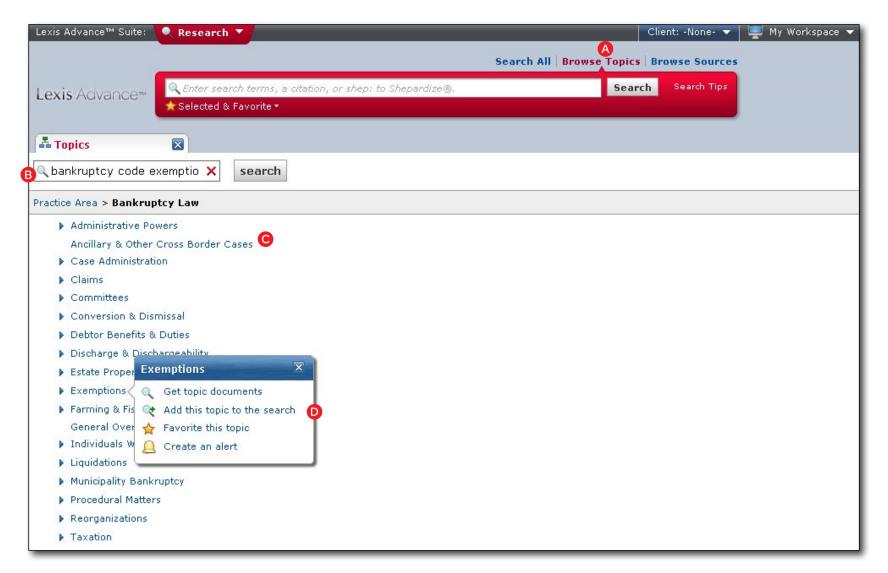
BROWSE SOURCES/FIND SPECIFIC SOURCES



- A Search for specific sources or browse through available Lexis Advance sources. Click **Browse Sources** above the red search box.
- **B** Enter a title or partial title. A source wheel suggests sources as you type.
- **6** Filter sources by content types and jurisdictions. Find what you need more quickly by selecting filters, e.g., California, then News.
- Refine sources alphabetically. Use this bar first to select a letter. Then add content and jurisdiction filters.

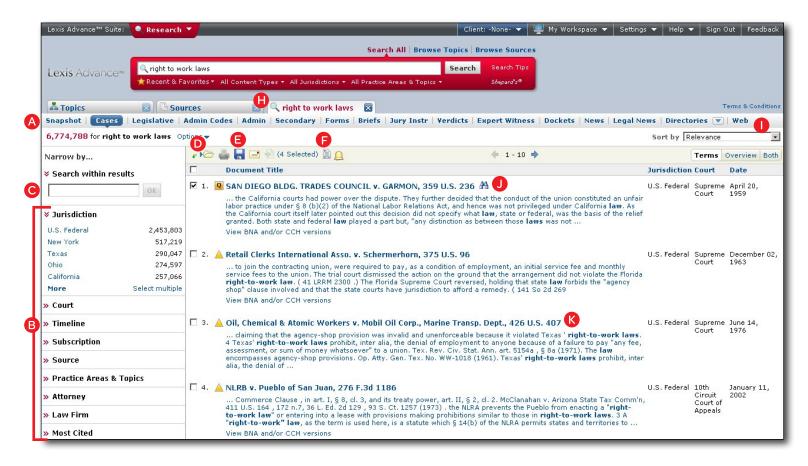
- **E** Click a source link and you can:
 - View source details such as coverage dates
 - Add the source to your search
 - · Save it as a favorite
- Search favorites and combine sources. After saving sources as favorites, click Browse Sources, then Selected & Favorite. Choose the sources you wish to search. Click Close. (Also save favorites from search results, including sources, topics and post-search filters.)





- A Open the Lexis Advance legal topic hierarchy. Click Browse Topics.
- B Search for specific topics. Enter your search words and click Search.
- Or browse levels of the legal topic hierarchy. Click a Practice Area link. Select a topic or use the arrows to open additional levels.
- Use your topic in your research! Once you choose a topic, you can:
 - Add it to a search (and add your own search words)
 - Create an Alert on the topic
 - · Save it as a favorite
 - View Lexis Advance search results on this topic, i.e., relevant cases, legislation, news, dockets, etc.
 - Some topics give you access to Topic Summary Reports, that offer seminal cases and statutes, secondary sources, details on burden of proof, etc.





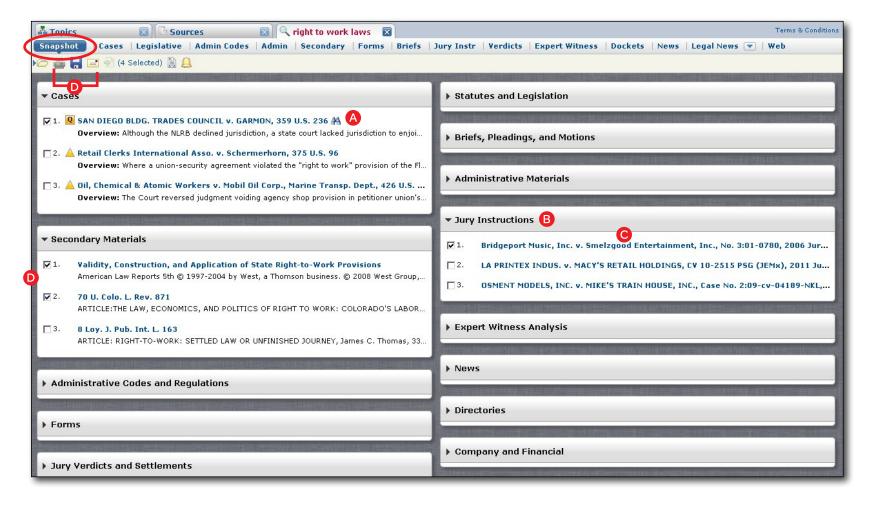
- A See the top results for each content type. Click the Snapshot view sub-tab.
- B Filter results—no extra charge! Further narrow your search results fast. Filters vary by source type, e.g., cases can be filtered by date, attorney/law firm, judge, etc. Select and remove multiple filters. Save favorite filter combinations.
- © Search within results. Refine your results by adding search words not covered in the post-filter options.
- D Save to a Work Folder. Check the box next to the document title and click the Work Folder icon. Select a work folder and click OK.
- **E** Print, download or email* without opening documents. Check the box next to document titles and click the appropriate icon.
- *According to the terms and conditions of your LexisNexis subscription.

- Create a printable page of your results.
- G Set up an Alert for your search.
- Navigate among research tasks. The anchor tabs show the tasks you've opened— documents, searches, *Shepαrd's* reports, research history, Work Folders, etc. Done with a task? Close its tab.
- 1 Sort documents. Default is by relevance. Use this pull-down box to re-sort by date, jurisdiction, etc. Or click the column headers to sort.
- Keep track of documents viewed. The binoculars icon marks documents you viewed over the last 30 days. Hover on the icon to see the last review date.
- Determine relevance. See your search terms in context to help you determine which documents are on point.



VIEWING THE MOST RELEVANT SEARCH RESULTS (SNAPSHOT VIEW)

View the most relevant documents retrieved in your search—in one screen—with the Snapshot View. Save even more time by using the Snapshot View to deliver documents for delivery to Work Folders or to colleagues via email, print, etc.*



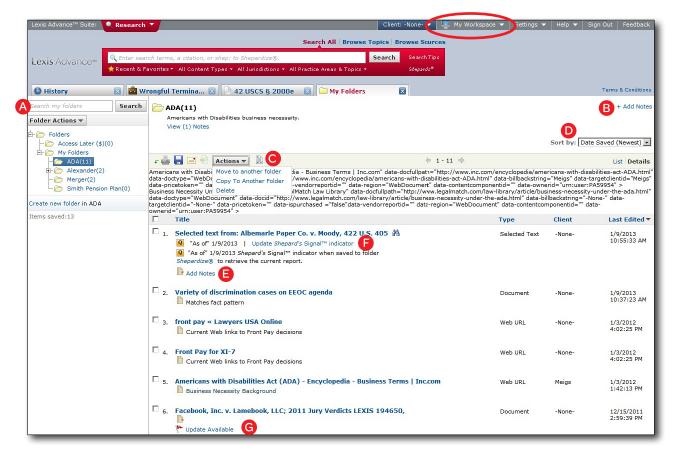
- **View the top three results** by relevance. In the **Snapshot View**, the first four content types display automatically.
- B Click a content type to view the top three results for that content type. Click the down arrow next to the content type to close the view.
- Click a document link to move to the full-text document.
- Deliver documents* across content types! It's fast. Check the boxes of the document you want and click the print, email or download icons.

^{*}According to the terms and conditions of your LexisNexis subscription.



USING WORK FOLDERS

To open Work Folders, use the green My Folder panel in My Workspace. Or Click **My Workspace** and **My Folders**. **Save more than full-text documents**. Copy and save selected document text, search results lists, searches from Research History, Web links, Topic Summary Reports, etc., as well as Research Maps and PDFs from other LexisNexis products like LexisNexis Verdict & Settlement Analyzer. **Subscription documents stay in Work Folders** until you remove them.



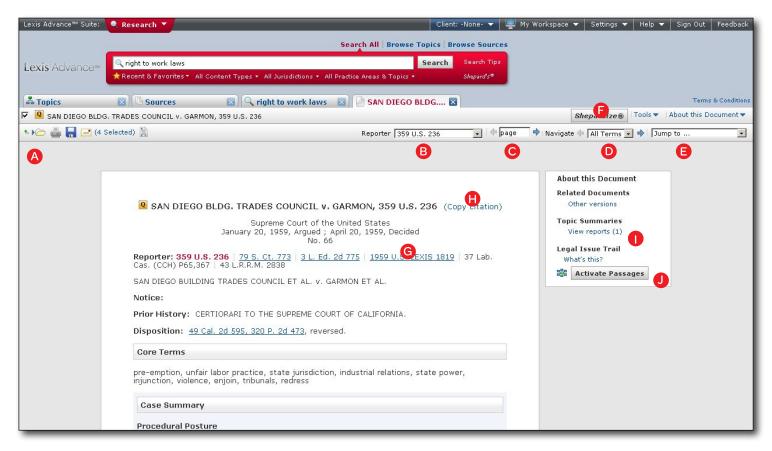
- Move, copy or delete folders. Click Folder Actions. Also download the folder, rename it or update all Shepard's Signal™ indicators.
- Add folder notes. Click and add up to 4,000 characters. You can hide or view these notes.
- Move, copy or delete folder documents. Check the box next to the document and click Actions.
- Organize folder documents. Re-sort by newest documents, clients, relevance and more.

- Annotate saved items. Click Add Notes and add reminders, important findings, etc.
 - **Or, annotate and highlight before you save!** As you review full-text documents, highlight text. Options for Selected Text include adding an annotation to the document or highlighting it. Include link to full-text cases page.
- **Ensure documents are good law.** See immediately when a document was checked via *Shepard's*. Update if needed.
- **Get notified of updates.** Documents you store in Work Folders are flagged when updates are available so you can retrieve them.



VIEWING FULL-TEXT CASE DOCUMENTS

When you view a full-text case, you also have immediate access to other vital case materials available through Lexis Advance, e.g., the original case in PDF version, related briefs, pleadings and motions for cases, topic summary reports, etc.

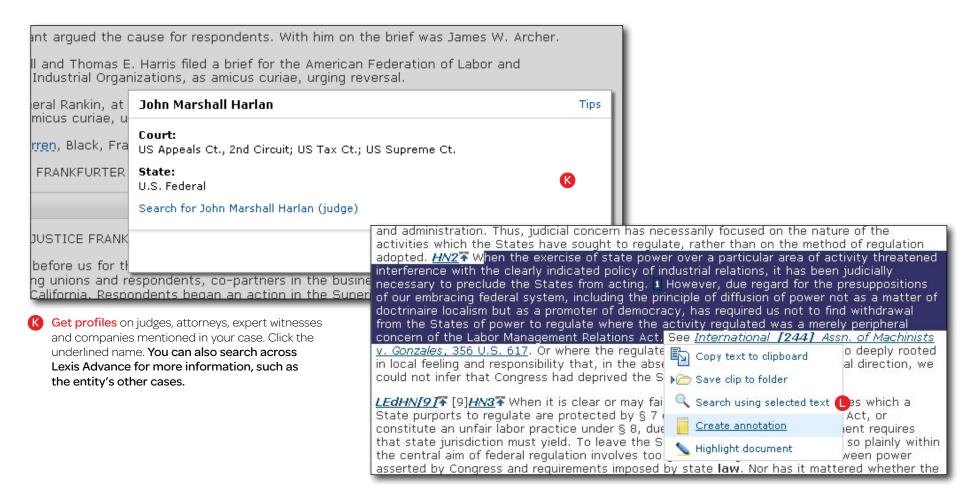


- A Save the document to a Work Folder.
- B Change pagination. Select a reporter from the reporter pull-down box.
- Move to a specific reporter page. Enter the number, e.g., 408, and click the arrow.
- D Navigate among search terms. Select a search term and click the arrows.
- **E** Move to a specific document segment. Select from the pull-down box. Also find **Top of Document** for quick return.
- **Shepardize**[®] the case.

- G Link to full-text documents cited. Just click the link.
- (H) Copy the full case citation for use in your work. Include parallel citations. Add a link back to the full-text case.
- Ome up to speed on the legal topics. Find seminal cases and statutes, secondary sources and details on burden of proof, review standards and more, for legal topics covered. Also find Topic Summary briefcase icons in your case's LexisNexis® headnotes.
- Check the Legal Issue Trail™. Find cases that cite to your case as well as cases cited by this case—for a specific legal issue or point of law. Click Activate Passages. Select the highlighted case passage that represents your issue. Legal Issue Trail opens in a new window.

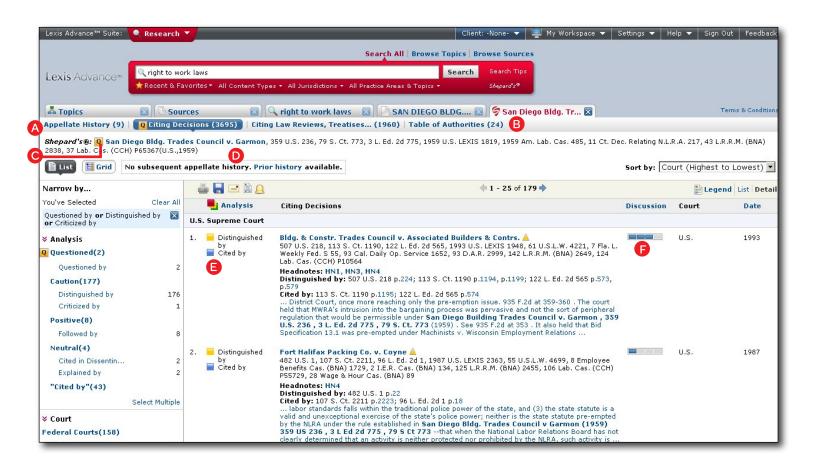
VIEWING FULL-TEXT CASE DOCUMENTS (Continued)

When you view a full-text case, you also have immediate access to other vital case materials available through Lexis Advance, e.g., the original case in PDF version, related briefs, pleadings and motions for cases, topic summary reports, etc.



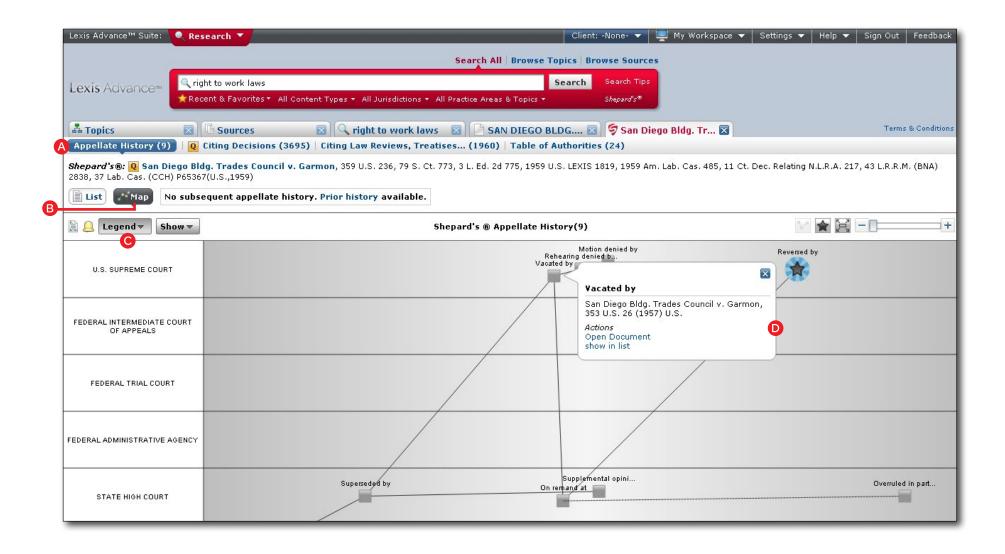
- Highlight—and use—vital text. When you highlight text, an Options for Selected Text box displays. You can:
- Annotate and/or save the text to a Work Folder.
- Copy the text and paste into your work—with citations and a link to the full text included.
- Search with the selected text.
- Highlight the text. You can highlight important passages throughout the document—using different colors—then save it to your Work Folder.





- A Find appellate or subsequent history fast. Shepard's reports are divided into four tabs: appellate history, subsequent citing decisions, secondary sources and Table of Authorities. See the number of references in each up front.
- B Table of Authorities shows the cases your case cited as well as the legal relevance and weight these cases currently have.
- **See treatment indicators up front!** Shepard's Signal indicators show subsequent treatment at a glance.
- Get an overview of subsequent history fast. In addition to the Shepard's Signal indicator, find a one-sentence description.

- **Review subsequent history by citing reference.** Get flag colors and short descriptions for each reference.
- **F** Determine how in-depth the citing case discusses the case you originally Shepardized™. The Depth of Discussion bars show you quickly.
- **G** Filter citing references to get to vital cases faster. Refine by specific editorial analyses, headnotes, jurisdictions or time frame. Even search for specific words within your results.



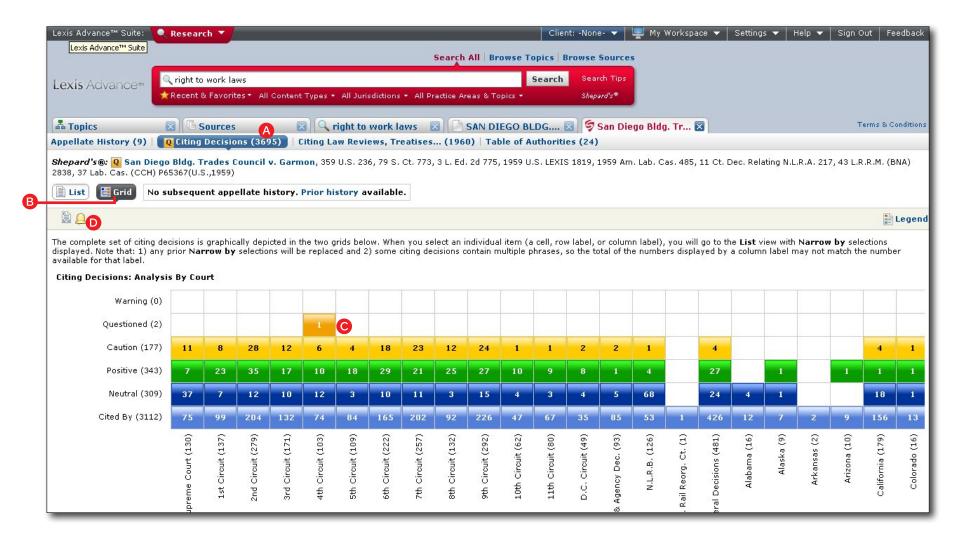
- View the History List. Click the Appellate History sub-tab. The List is the default view.
- **B** View the history in a graphical map. Click the Appellate History sub-tab, then click Map. (Map view is shown.)

- **See what each map icon means.** Click **Legend**. For example, the star labels the citation you *Shepardized*.
- **D** Review vital cases in the appellate history. Click a map icon. Then you can go to the full-text document or the reference in the List view.



USING SHEPARD'S® GRAPHICAL FOR CITING REFERENCES

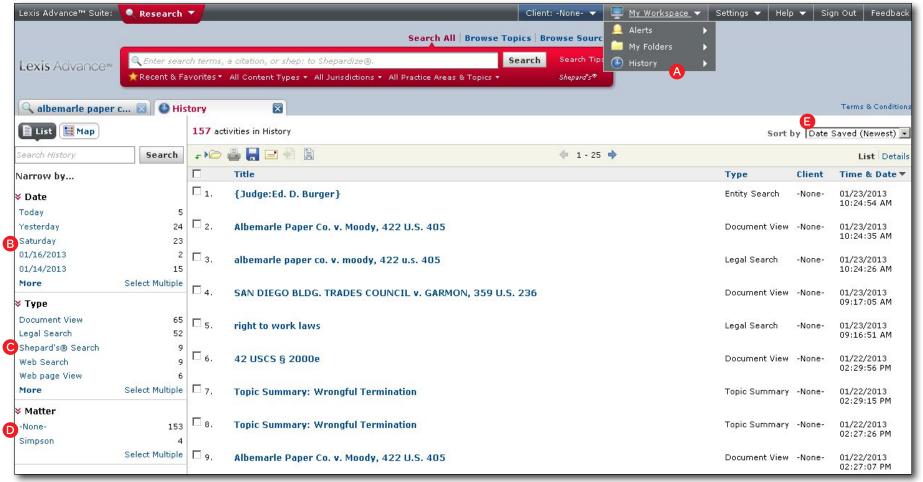
Citing References Grid—Rarely are cases overruled totally. Points of law within cases may continue to be cited across many jurisdictions. This grid shows you that quickly and effectively.



- A View the citing list. Click the Citing Decisions sub-tab. List is the default view.
- **B** Get the big picture in a graphical grid! Click Grid. (Grid view is shown.)
- **Go to vital references in one step.** Click a grid box and move to those cases in the List view.
- D Set an Alert for changes! Click the Gold Bell icon and request negative analysis, any change or changes you choose.



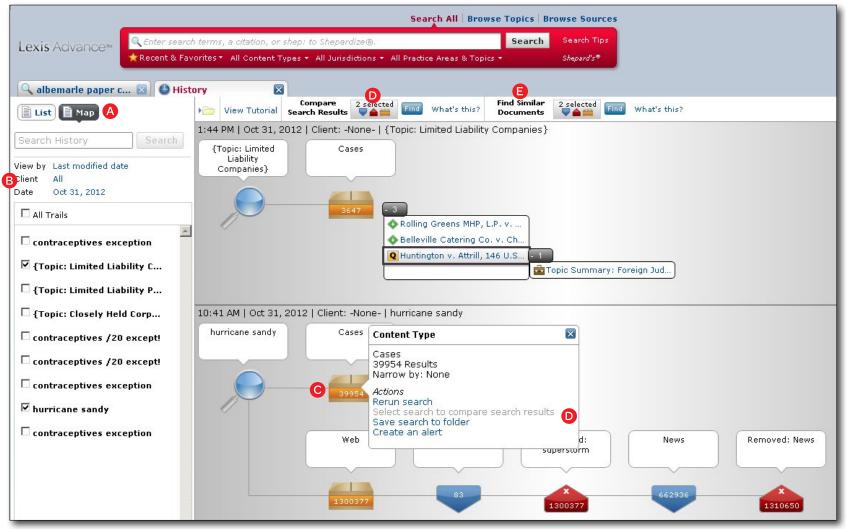
View research history for the past 90 days. Searches, document views, Shepard's reports, document delivery, Web page views, topic summaries, etc., are recorded. You can view your research history in a List view or as a graphical research map. Get interrupted during research? Pick up where you left off quickly by going to your Research History. And go back to your Research History to save useful searches to your Work Folders.



The List view shows all activity and is the default view.

- Open Research History. Click My Workspace and click History. Or choose a list view, a graphical map or one of your last 10 tasks. Also open Search History from your My Workspace carousel.
- **View past research by date(s).** Select a date from the left filtering pane. Only dates with research are shown. Also review by date range.
- **Filter research history by task type.** See Alerts created, email sent, Web searches, legal searches, etc.
- **D** View prior research for specific clients. Just select a client name from the filtering pane.
- Set display preferences. The List view can also display 10, 25 or 50 items at a time.



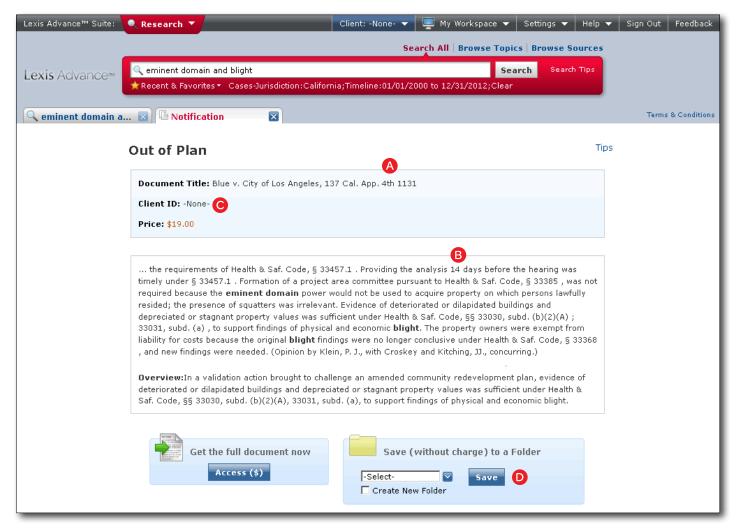


This is a graphical representation of the list activity.

- ★ Get a step-by-step graphical depiction of your prior research. Click Map to identify explored versus unexplored paths, allowing you to uncover other relevant results.
- **B** Filter your map. Filter by client, date, etc.—just like the List view.
- **Rerun or save your work.** Click a map icon and choose to **rerun** your search or **save a search to a Work Folder**. Even create an **Alert**.
- Compare 2 3 search results to find common documents—and perhaps expand your research. Click search icons in the map and choose the compare links. Then go to Compare Search Results and click Find. Your results open in a new window.
- E Find similar relevant documents. Click document icons in your map then choose the compare links. (Not shown) Then go to Find Similar Documents and click Find. This is a fast way to compare relevant documents to find more, including ones you may not have reviewed yet.



With Out-of-Plan notification, you know immediately if the document you wish to view is outside your subscription plan. Also view the document cost and a summary so you can make an informed decision.



- A Did you select a document outside your subscription? This screen displays.
- B Decide if the out-of-plan document is relevant. Preview the free summary.
- **6** What's the additional charge? The document cost is displayed up front.
- Access it later; use it for a year. Save the document to a Work Folder and gain access at an additional charge later. Once accessed, you can continue to access the document from the Work Folder at an additional charge, for one year.



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