



LexisNexis®

Lexis Advance®

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

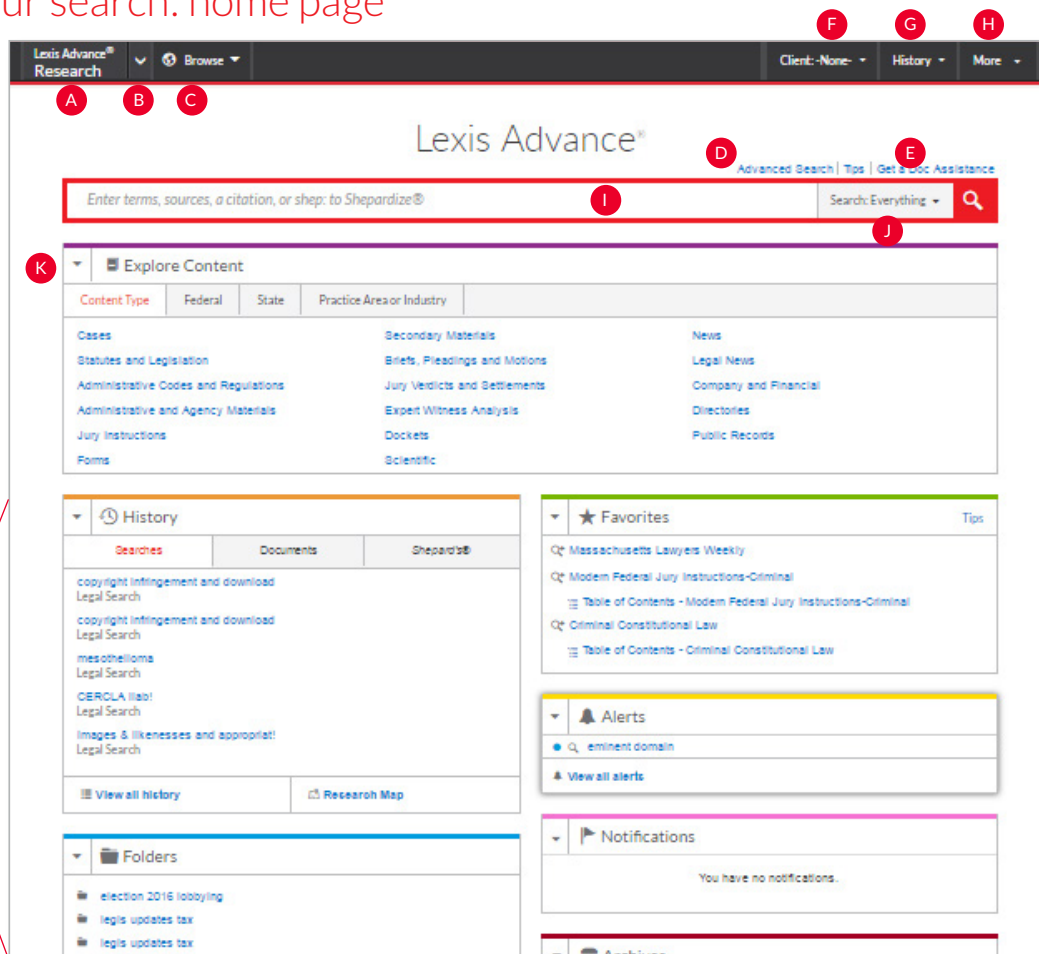
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Please note: All screens shown may change slightly as new sources, features and enhancements are added.

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



## Start your search: home page



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

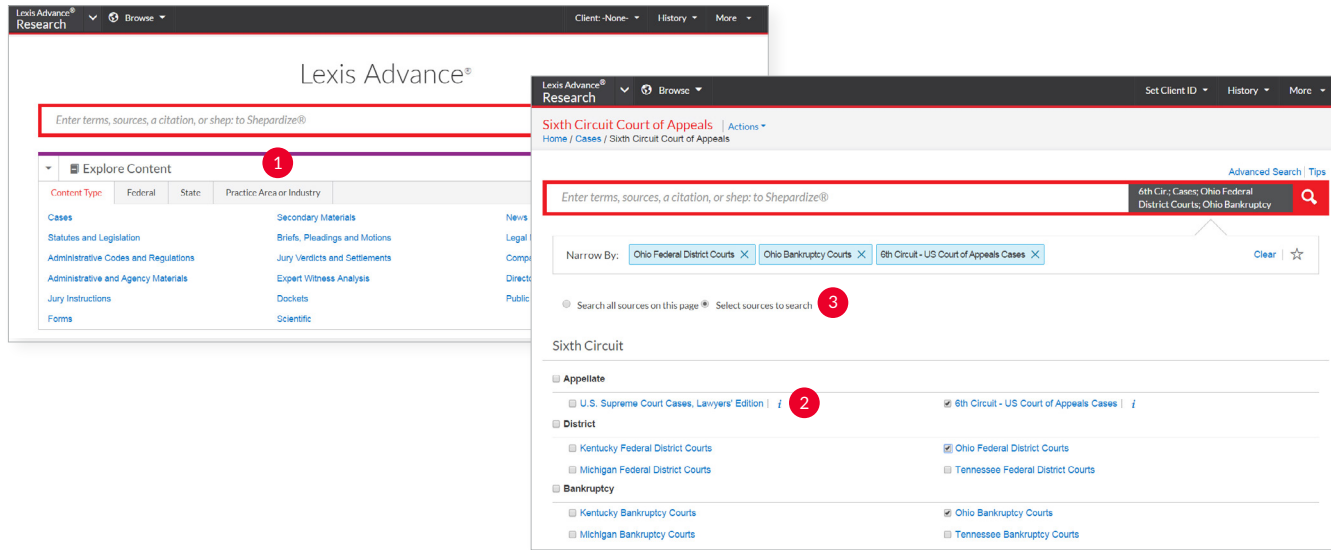
- A Return to the home page.** Click **Lexis Advance Research** on any screen.
- B Access other subscription products.** Click the down arrow for access to your other subscription products, such as LexisNexis® Public Records.
- C Browse sources, legal topics or link to practice centers.** Click **Browse**. 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 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.**
- G Return to recent searches** or documents retrieved. Also connect via the History pod below the Red Search Box.
- H Link to Settings, Help, My Lexis™, Sign Out, etc.** Also gain access to Folders, Alerts and Notifications. Or use the landing page pods shown on this page.
- I Enter your search words, find sources and more with the Red Search Box.**  
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**
  - **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**
- J Refine your search up-front and filter** by content, jurisdiction or practice area—or get help with terms and connectors. **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.
- L Get there quicker!** Get fast access to favorite sources, Folders, Alerts, Archived Codes and legal topic update notifications (a blue dot means that item has new information). Also get access to **Help topics** and **online tutorials**.

**As you type, the Red Search Box offers suggested legal phrases, documents or sources.**

*Rearrange your Lexis Advance home page, moving the pods to put what you want at the top. Just drag and drop.*



# 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 or State 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 Red Search Box shows your choices as you select. When you're ready, enter your search words and search.

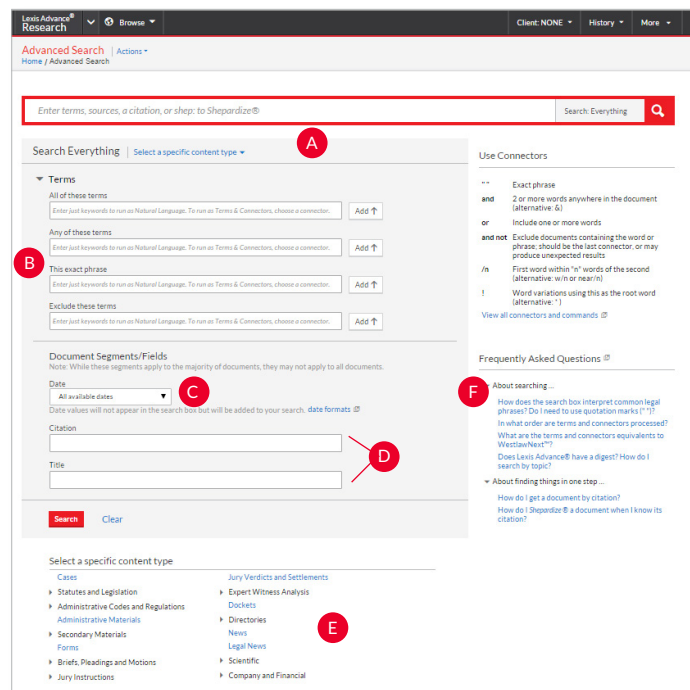
To choose multiple sources, click **Select sources to search**, then select source checkboxes.

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 above the Red 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 Red 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 Red Search Box.

- Select a source title to add it to your search.
- Select a source's **Table of Contents (TOC)** link  to browse the TOC, search the full TOC or **select specific parts of the TOC** to search and/or deliver.

	bankru
	<a href="#">Add Source as Filter</a> Alabama Bankruptcy Cases Asbestos Bankruptcy: Mealey's Litigation Report Collier Bankruptcy Case Update  Collier Bankruptcy Practice Guide  Collier on Bankruptcy, Sixteenth Edition  10th Circuit - US Bankruptcy Cases 11th Circuit - US Bankruptcy Cases
Documents	<a href="#">bankrupt railroad service preservation and employee protection act of 1982</a> <a href="#">bankruptcy abuse prevention and consumer protection act of 2005</a> <a href="#">bankruptcy act of 1800</a> <a href="#">bankruptcy act of 1841</a> <a href="#">bankruptcy act of 1898</a> <a href="#">chandler act (bankruptcy revision)</a> <a href="#">chandler rail bankruptcy act</a>
Legal Phrases	<a href="#">bankruptcy petition</a> <a href="#">bankruptcy cases</a> <a href="#">bankruptcy proceeding</a> <a href="#">bankruptcy rule</a>

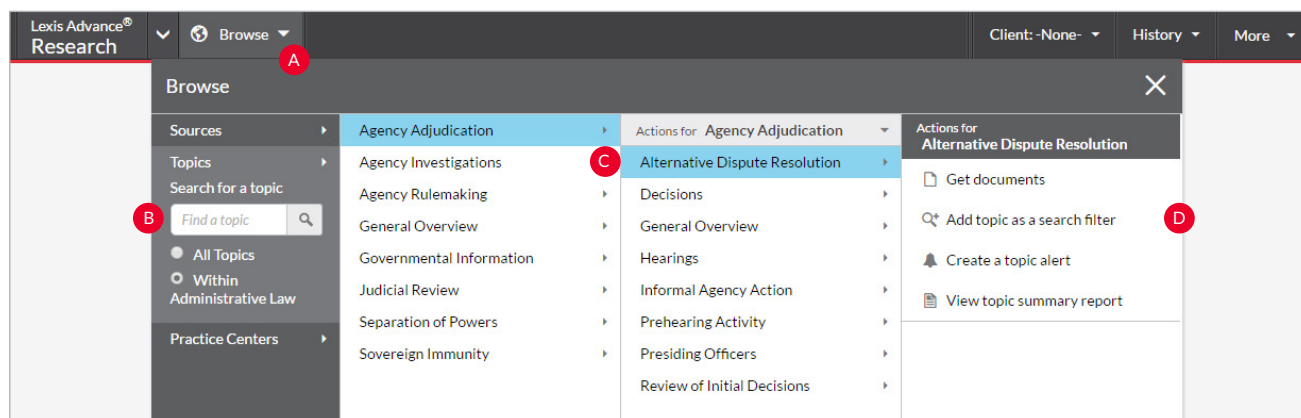
You can also search or browse source listings:

The screenshot shows the Lexis Advance Sources page. Callout A points to the 'Browse' button and the 'Sources' tab. Callout B points to the search box for sources. Callout C points to the 'Narrow By' filter section. Callout D points to the alphabetical navigation bar. Callout E points to the 'Add source as a search filter' button. Callout F points to the information icon (i) for a source. Callout G points to the 'Add All These as Search Filters' button.

- 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 choose all the sources on the screen to your search.



## Browse Topics: find and search by legal topic

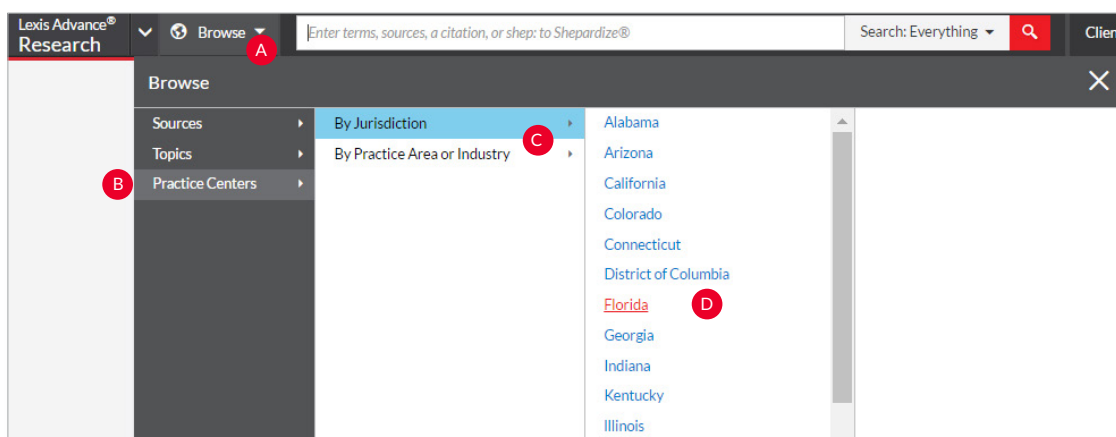


If you prefer to find a legal topic to begin your research, start in Browse Topics. You can also enter this Lexis Advance legal topic hierarchy by selecting a **relevant headnote** in a case you are viewing.

- A** **Search for specific topics** or browse through the Lexis Advance legal topic hierarchy. Click **Browse** then select **Topics**.
- B** **You can search for specific topics.** 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 on 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 Page:

- 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. Click the **Actions** pull-down menu next to the page name and select **Make this my research start** page.



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

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 jurisdictions, content categories and/or practice areas.

- A** Click the **Search: Everything (Filters)** pull-down menu to add filters. As you add, the filters box displays your choices.
- B** As you add filters across screens, the **Narrow By:** box displays your selections. Click the **X** to delete a choice or **Clear** to remove all choices.
- C** Finished selecting filters? You can **save the combination** as a favorite and reuse. Click the **star**.
- D** **Category** options include all content types available.
- E** **Practice Areas & Topics** options include more than 40 practice areas.
- F** **Recent & Favorites** options include up to 50 recent and favorite sources/source combinations, recent and favorite filter combinations, and recent and favorite legal topics selected from Browse Topics.
- G** Click **Search** to close the Filter box.



## Search results: find the most relevant documents fast

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 or expand your search. Or create a link back to this screen of results.
  - C** **See the top relevant results** for each content category. Click **Snapshot**. View the number of results for most content categories.
  - D** **Save to a Folder**. Check the box next to the document title then click **Add to Folder**. Select a **Folder**. When that document appears in future results, it displays the **Saved to Folder** icon . Click the icon for quick Folder access.
  - E** **Print, download or email** without opening documents. Check the box next to your document titles, click the **Delivery** icon and choose your delivery method—print, download or email. Or create a printer-friendly page of results.
  - F** **Sort documents**. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc. You can sort the same way each search—select **Edit Default Order**.
  - G** **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.
  - H** **Keep track of documents viewed**. The **glasses icon** marks documents you viewed over the last 30 days. Hover over the icon to see the last viewed date.
  - I** **Determine relevance**. See your search terms in context to help determine which documents are on point. Hover over the highlighted terms, then click the link to go directly to those terms in the document.
  - J** **Return to prior research tasks**. Click **History** and select a prior search or document.
  - K** **Refine your search**. Need a smaller, more focused results set? Filter by:
    - **Content category**, e.g., move to statutes, secondary sources and more. Just select a content type
    - **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 Narrow By**. Remove the filter; just click the X in the blue box (not shown). Select and remove multiple filters. Bring up to three preferred jurisdictions or three courts to the top of your filters list; open the Courts filter and click **Edit Settings**.
- Save favorite filter combinations**, e.g., your practice area and jurisdiction, to use again. Click the **star** and save the combination to your Favorites pod on the landing page.



## Folders: save documents, select text, searches, etc.

The screenshot shows the Lexis Advance Research interface. At the top, there's a search bar with the text "Enter terms, sources, a citation, or shep: to Shepardize®" and a search button. Below the search bar, the folder name "Folder: Age discrimination" is displayed. On the left, there's a "Folders" pod with a search box (C), a "Create New Folder" button (F), and a list of folders including "My Folders", "Back pay (2)", "Front pay (1)", and "Age discrimin...". Below the folders, there's an "Access Later (\$)" section (0), a "Shared by Me" section (2), and a "Shared by Others ..." section. At the bottom left, there's a "Recycle Bin" link (K). In the center, there's a list of documents. The first document is "1. Nev. Rev. Stat. Ann. § 612.371" with a "Shared by Me" indicator (I) and a "Shepard's Signal™ indicator" (J). The second document is "2. 5 USCS § 5596" with a "Shared by Me" indicator (H) and a "Shepard's Signal™ indicator" (J). On the right, there's a "Sort by:" dropdown menu (E) set to "Last modified (newest)". At the bottom right, there's an "Update document" button (L).

Gain access from the **Folders** pod on the landing page or click the **More** pull-down menu at the top of most Lexis Advance screens and choose Folders.

**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, web links, Topic Summary Reports, PDFs, etc., as well as documents from other LexisNexis® products like LexisNexis® Verdict & Settlement Analyzer. 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.

- A Add Notes.** 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 listing(s). Select the **Delivery icon**, 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 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. Also see how many documents you've shared or saved for later purchase.
- H Share work folders with colleagues.** Quickly access folders that have been shared within your organization.
- I Click a document listing** link and view the search, filters and sources used to get the document. Retrieve the document or view the text selection. **Add Notes** 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.





## Snapshot view: view the most relevant results on one screen

The screenshot shows the Lexis Advance Research interface. At the top, the search term is "age discrimination in employment and front pay". Below the search bar, the "Results for" section shows "age discrimination in employment and front pay" with a notification bell and an "Actions" dropdown. On the left, a "Snapshot" sidebar (A) lists various content categories with counts: Cases (1,586), Statutes and Legislation (178), Administrative Codes and Regulations (9), Administrative Materials (229), Secondary Materials (1,234), Forms (32), Briefs, Pleadings and Motions (9,078), Jury Instructions (128), Jury Verdicts and Settlements (196), Expert Witness Analysis (14), Dockets (Get), Directories (0), News (Get), Legal News (112), Scientific (0), Company and Financial (Get), and Web (Get). The main "Snapshot" area (B) displays a list of results under the "Cases (1,586)" category (C). The first result is "Hansard v. Pepsi-Cola Metro. Bottling Co., 865 F.2d 1461" with an "Overview" section. The second result is "McKennon v. Nashville Banner Publ. Co., 513 U.S. 352" with an "Overview" section. On the right, a "Jump To:" dropdown menu (D) is open, showing a list of content categories with their respective counts, matching the sidebar. The categories include Cases (1,586), Statutes and Legislation (178), Administrative Codes and Regulations (9), Administrative Materials (229), Secondary Materials (1,234), Forms (32), Briefs, Pleadings and Motions (9,078), Jury Instructions (128), Jury Verdicts and Settlements (196), Expert Witness Analysis (14), Dockets, Directories (0), News, Legal News (112), Scientific (0), Company and Financial, and Web.

Save time by browsing the most relevant documents retrieved by your search—on one screen—with the Snapshot view. Save even more time by using the Snapshot view to **deliver multiple documents**, e.g., print or email, to colleagues.

- A** **Scroll and view the top three results** by relevance. In the **Snapshot** view, the first four content categories in your search are open to display automatically.
- B** **Deliver or save documents across content categories.** It's fast! Browse and check the boxes of the document you want and click the **Delivery** icon to select **print**, **email** or **download**. Or choose the **Folder** icon and save even more time as you deliver. Quick delivery options let you **bypass** dialog boxes.
- C** **Click a document link** to move to the full-text document.
- D** **Quickly move to a specific type of content.** Use the **Jump To:** icon and pull-down list to see a different results section.



# 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.**

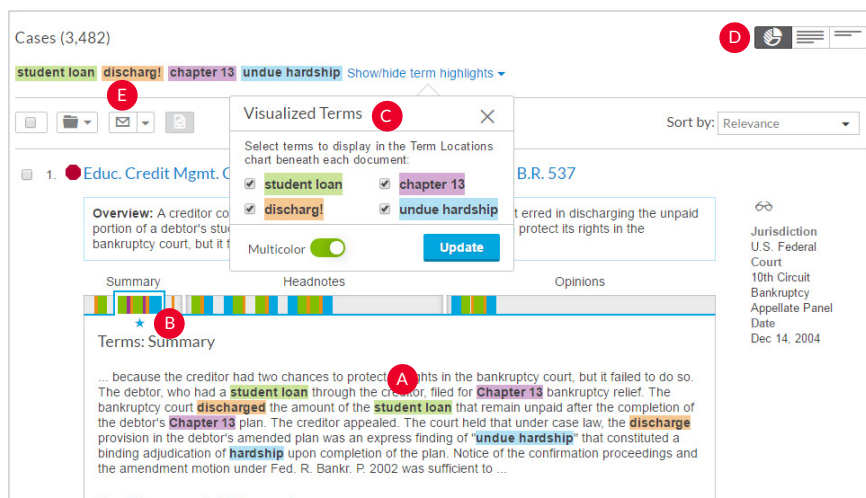
**B Move among top search term passages.**

Select a color marker or blue window surrounding a hit cluster and view the search term or cluster in context. The star indicates the best cluster of search terms. Also click on a 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) or Title Only view. To turn off Search Term Maps, click the **More** pull-down menu and then click **Settings**. Under General, un-check the Graphical View box (not shown).

**E Print/deliver or save results lists** to Work Folders. The Search Term Location Bars for your results lists are included.



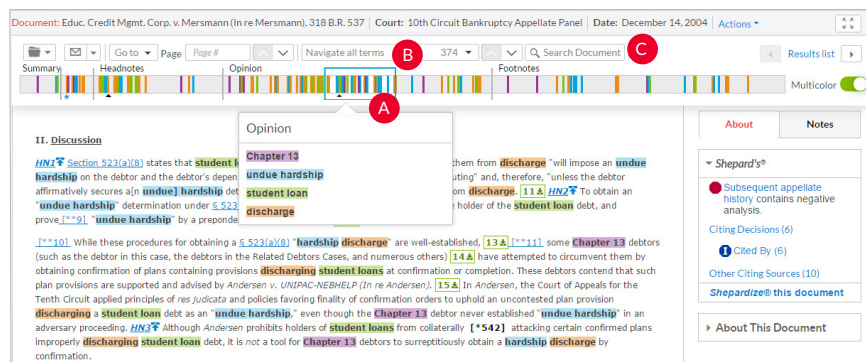
## When you view a full-text case:

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 the color marker or cluster to move to those terms in full text.** Or slide the blue window “scroller” to move through the document.

**B Navigate to specific search terms.** Click **Navigate 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.





# Cases: get more than full text

Document: Educ. Credit Mgmt. Corp. v. Mersmann (In re Mersmann), 318 B.R. 537 | Actions

Summary | Headnotes | Opinion | Footnotes

Search Document

**Educ. Credit Mgmt. Corp. v. Mersmann (In re Mersmann), 318 B.R. 537**

Copy Citation

United States Bankruptcy Appellate Panel for the Tenth Circuit

December 14, 2004, Filed

BAP No. KS-04-018, Bankr. No. 98-41940-13, Chapter 13

Reporter  
318 B.R. 537 \* | 2004 Bankr. LEXIS 1935 \*\* | Bankr. L. Rep. (CCH) P80,223

In Banks, the Fourth Circuit recognized that although a confirmation order is generally afforded preclusive effect, "we cannot defer to such an order if it would result in a denial of due process." 299 F.3d at 302 (Baldock v. J., sitting by designation). The court noted that the simple "notice" a creditor receives under Rule 2002 falls far short of the procedural safeguards and heightened service of process requirements of an adversary proceeding guaranteed by Rules 7001, 7003, 7004, and 7012. See *id.* at 301. "Where the Bankruptcy Code and Bankruptcy Rules specify the notice required prior to entry of an order," the court declared, "due process generally entitles a party to receive the notice specifically required before the binding the party will be afforded preclusive effect." *Id.* at 302.

Following the Fourth Circuit's lead, the Seventh Circuit also rejected discharge-by-declaration on due process grounds in *Hansen*, 397 F.3d at 482. The court embraced the analysis of Banks and Poland, finding the cases to hold "greater persuasive force because they are consistent with Congress' unmistakable intent to make student loan debt nondischargeable absent a showing of undue hardship." *Id.* at 486. The court concluded that Andersen and Ardee allowed debtors "to flout both substantive and procedural provisions of the Bankruptcy Code and Rules through a meaningless incantation of 'undue hardship' in their proposed plans." *Id.* while respecting the strong policy favoring finality of confirmation orders, "the dictates of due process trump policy arguments about finality." *Id.*

The Sixth Circuit came to the same conclusion in *Buehls*, 412 F.3d at 679. "The court's decision, albeit not to discharge, underscores the importance of the discharge process, which embodies many of the dangers inherent in winking at due process, which First, it ignores the clear intent of Congress and the Judicial Conference and the Judicial Conference, in the rules, require an adversary proceeding and legitimizes it with court sanction. Those who push past are rewarded.

*Id.*

Finally, *HMS* the Second Circuit proscribed discharge-by-declaration on Mgmt. Corp., the court concluded, "although confirmed plans are not judicial issues that must be brought by an adversary proceeding, or were not sufficient." 432 F.3d 150, 154 (2d Cir. 2005) (citing *Enewally v. Wash. Mut. Bank (In re Enewally)*, 368 F.3d 1165, 1173 (9th Cir. 2004)). Accordingly, the court held that the bankruptcy court lacked the authority under 11 U.S.C. § 1328(a) to grant a discharge of the debtor's student loan debt.

ION, Appellant, v. PATTI JAN MERSMANN, Appellee.

of Kansas.

ons, adversary proceeding, completion, hardship, cases, original plan, special class, inserting

About | Notes

Shepard's®

- Subsequent appellate history contains negative analysis.
- Citing Decisions (6)
- Cited By (6)
- Other Citing Sources (10)
- Shepardize® this document

About This Document

- Topic Summaries
- View reports (6)
- Legal Issue Trail™ | Tips
- Activate Passages

Copy (Quick)

Copy (Advanced)

Add to folder

Add to search

Annotate

Highlight

When you view a full-text case, you also have quick access to other vital case-analysis resources available via Lexis Advance, e.g., *Shepard's* reports, Legal Issue Trail™ and Topic Summary reports.

- 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** **Save and add the document** to a Folder, 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** **Add more search words.** In the **Search Document** box, enter specific words to further refine your search.
- E** **Move among results documents.** Click **Next document** or **Previous document** arrows. Click **Results list** to return to your last position in the results list.
- F** **Annotate and save your notes.** The Notes tab displays your annotations for fast reference. (See R.)
- G** **Create a direct link** to quickly and easily share your full-text document.
- H** **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.
- I** **Copy the full-case citation** for your work. Include parallel citations and a link to the full-text case. Format using a variety of style formats.
- J** **Check the *Shepard's* status immediately.** See possible issues and move directly to the *Shepard's report*.
- K** **Change pagination.** Select a reporter.
- L** **Get more detail** on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to **search across Lexis Advance**.
- M** **Move to other available documents** and related court materials.
- N** **Get up to speed on the legal topics.** Find **seminal cases and statutes**, relevant secondary sources and details on burden of proof, review standards, etc., for the legal topics covered. Also find orange **Topic Summaries** links next to LexisNexis® headnotes. Click and link to Topic Summary Reports.
- O** **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.
- P** **Link to full-text documents cited.** Just click the link.
- Q** **Return to the top of a page**, with a single click. While scrolling, click on the **Back to the Top** arrow.
- R** **Highlight—and use—vital text.** 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**; 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.**



## 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** Look for the **TOC icon** in selected sources. Select a source's TOC icon 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 Red Search Box.
- C** Click the pull-down menu and choose to search TOC documents and headings simultaneously or separately.
- D** Make a **TOC chapter into a Favorite** source. Click the **star** to add the chapter or title to those sources you frequently search. Access Favorites on the Home Page.
- E** 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 Red 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
  - 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** Save, deliver and/or share. Familiar icons let you save reports to a Folder or deliver report specifics. For example, you can deliver the *Shepard's* report, the full text of citing references or both.
- G** Sort report results by date, analysis and more.
- H** 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 (not shown). Select and remove multiple filters.
- I** See how citing cases have been treated subsequently by viewing their *Shepard's* Signal indicators.
- J** Determine how in-depth the citing case discusses the case you *Shepardized*<sup>TM</sup>. The depth of *Discussion* bars show you quickly.
- K** Find on-point headnote language. Click a headnote of interest and move to similar language in the citing case.
- L** Pinpoint a citing case's language. Get flag colors, a short description, a pinpoint page reference—and the case language in question.
- M** Review what each signal indicator means in the *Shepard's Legend* at the bottom of the screen.



## Shepard's Graphical: map the appellate history

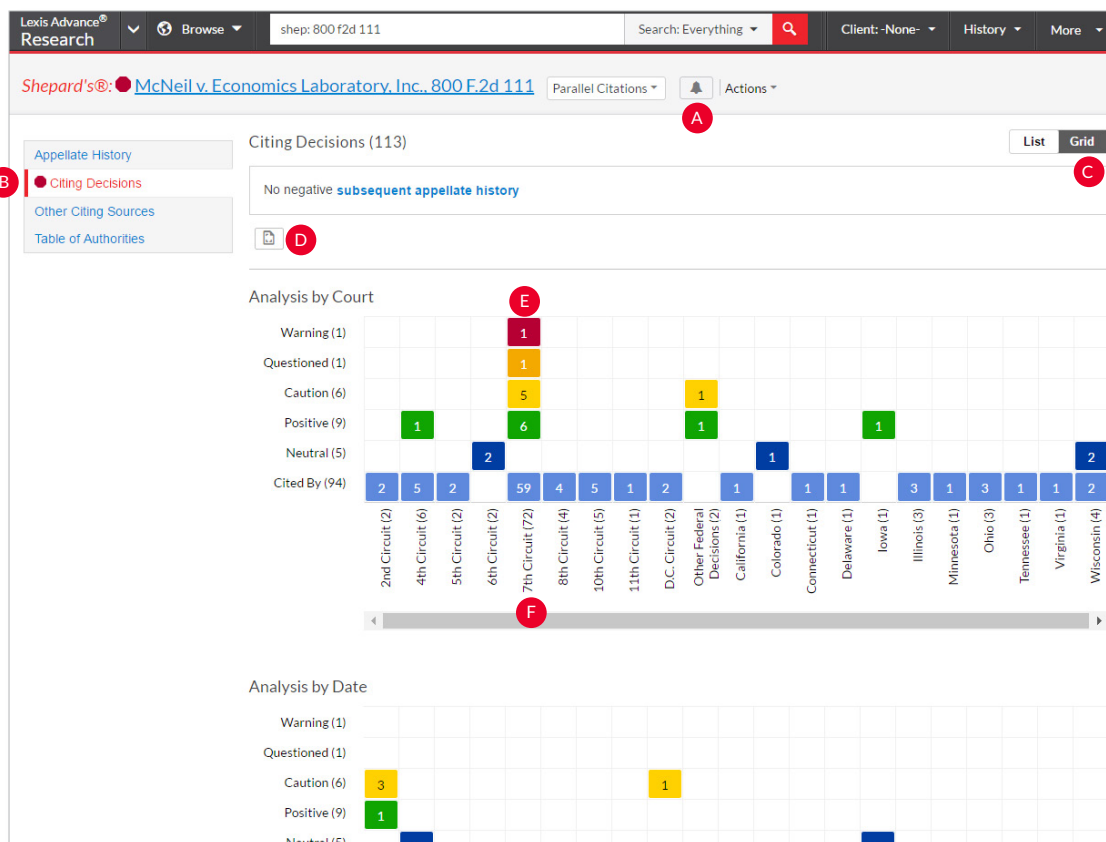
The screenshot displays the Lexis Advance Research interface for the case *McNeil v. Economics Laboratory, Inc.*, 800 F.2d 111. The top navigation bar includes the Lexis Advance Research logo, a search bar with the case number, and various utility buttons. The main content area is titled "Appellate History (5)" and features a "List" tab and a "Map" tab. The "Map" tab is active, showing a graphical representation of the case's appellate history. The map is divided into three horizontal sections representing different court levels: U.S. SUPREME COURT, FEDERAL INTERMEDIATE COURT OF APPEALS, and FEDERAL TRIAL COURT. A central node in the FEDERAL INTERMEDIATE COURT OF APPEALS section is labeled "Affirmed by" and is connected to a node in the U.S. SUPREME COURT section labeled "Writ of certiorari...". A node in the FEDERAL TRIAL COURT section is labeled "Later proceeding a..." and is connected to the "Affirmed by" node. Another node in the FEDERAL TRIAL COURT section is labeled "Costs and fees pro...". A pop-up window titled "Shepardized @ case Affirmed by" is open over the "Affirmed by" node, displaying the case name and citation, and providing actions such as "Open Document" and "Show in list". The interface also includes a legend, display options, and a search bar.

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 **Map**. (Map view is shown.)
- 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

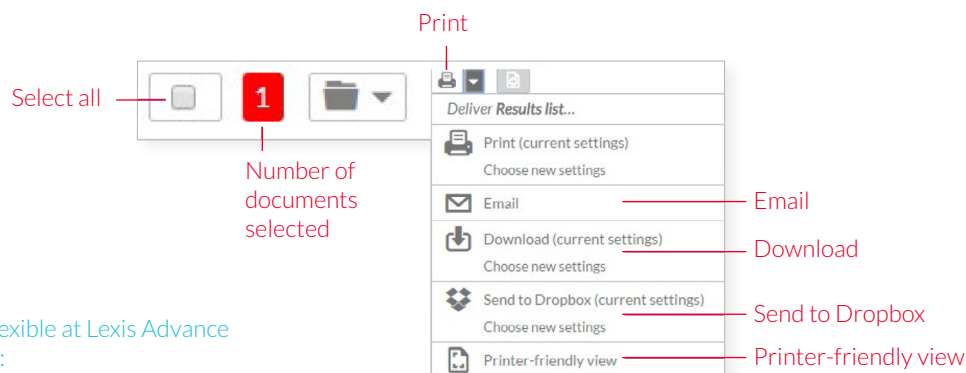


Rarely are cases overruled totally. Points of law within cases may continue to be cited across many jurisdictions. This grid shows you that quickly and effectively.

- 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 **Grid**. (The *Shepard's Graphical 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 **7th Circuit (72)**, to view those cases in the List view.
- Understand grid components.** Click **Legend** at the bottom of the screen (not shown). A Legend is also available at the bottom of the List view screen.

## 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 "red number" or "Select all" boxes.)



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 red 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 documents or Alert searches. Even deliver your Research History Map! You can also use the **Printer-friendly view** icon (not shown) 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.
- **Documents to Dropbox®.** This functionality is widely available. If you do not see the Dropbox icon (shown above) in your delivery options, check with your Lexis Advance account administrator or your LexisNexis representative.
- **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.

After you select the **Delivery** icon, you can choose delivery options. Or **save a step and bypass options by selecting your current settings.** If you select **Choose new settings**, 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 and Send to Dropbox options

**Basic:** Send as PDF, .Docx. Even select WordPerfect® .WP. You can group and/or compress files. Select file name and destination. You can also download to CaseMap® case analysis software.

**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, .WP or send to CaseMap, 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.

The screenshot shows the 'Search Alert' configuration page. At the top, there are four tabs: 'Overview' (marked with a red circle A), 'Monitor' (marked with a red circle B), 'Deliver' (marked with a red circle C), and 'Share' (marked with a red circle D). Below the tabs, the 'Overview' section is active. It includes a 'Duration' section with 'Start' and 'End' date pickers (both set to Sep 01, 2015 and Sep 01, 2016 respectively). The 'Delivery type' section has two radio buttons: 'Online only' and 'Email + Online' (which is selected). The 'Email address' field contains the placeholder text 'first.last@emailaddress.com'. The 'Delivery format' section has two radio buttons: 'HTML' (selected) and 'Text'. The 'Frequency' section has a radio button for 'Daily'.

**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**.



## View Alerts results

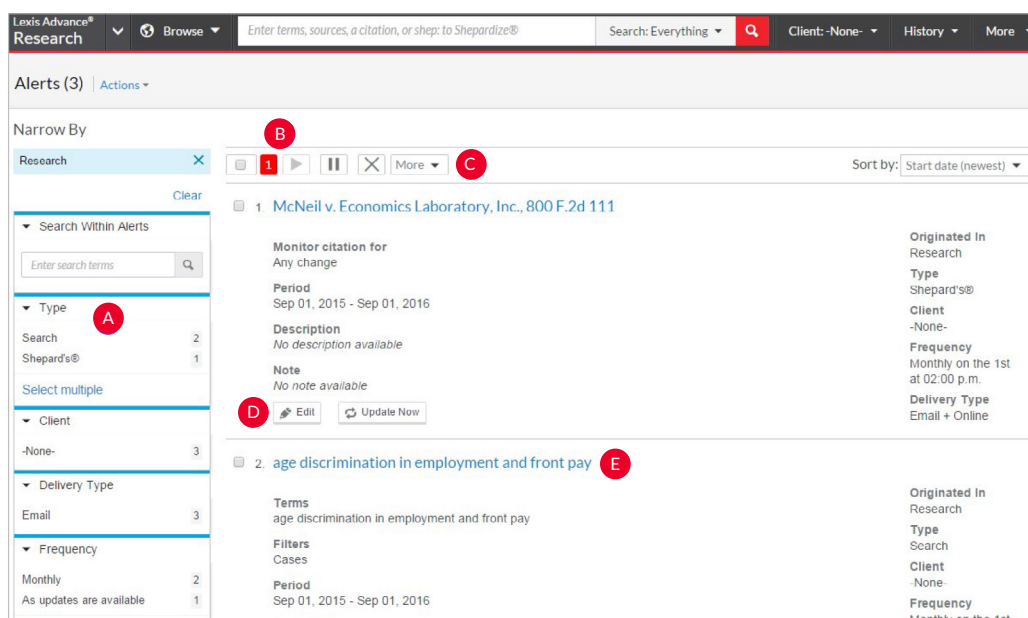
Email updates come to your inbox. View search terms to determine relevance. Select documents and review and use internal document links to navigate to other relevant documents.

Plus you can view all your Alerts and check for updates from the Lexis Advance home page. Check the Alerts pod. The blue dot denotes that update results are 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.



On the Alerts management screen, you can:

**A** Filter results, even adding more search words to refine your results.

**B** Use the icons to:

- Select multiple Alerts for edits **1**  
As you select, the red box counts for you
- 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 blue dots.

### 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, topic summaries, even searches from other LexisNexis products like LexisNexis® Litigation Profile Suite. **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 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. Link to your complete History list by selecting **View all history**.
- 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 tasks 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 History Map** to one of your Folders.
- 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 icon in your map and **select document to find similar results**. 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**.

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