



LexisNexis®

Lexis Advance®

# THE RESEARCH TASKS YOU DO MOST: HERE'S HOW AT LEXIS ADVANCE®

Many of your favorite research tasks—those tasks you rely on to get to the information you need—can be completed at Lexis Advance® in a couple of steps. Try them out. They're so simple you'll memorize them quickly.

Sign in to Lexis Advance at [www.lexisadvance.com](http://www.lexisadvance.com)

## Need more assistance with Lexis Advance?

Go to the Lexis Advance Support & Training site at [lexisnexis.com/advancesupport](http://lexisnexis.com/advancesupport) for help.

Call LexisNexis® Customer Support at [800-543-6862](tel:800-543-6862).

Talk to a representative virtually 24/7.

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## Search



### Personalize your home page

Move home page pods, e.g., History, Alerts, etc., where you want them. Just **drag and drop the pods into the position you prefer**. (The Explore Content pod cannot be moved.) You can also rearrange Practice Center pods.



### Start searching with the source combination you want

The screenshot shows the 'Explore Content' interface. Callout 1 points to the 'Content Type' tabs (Federal, State, Practice Area or Industry, International). Callout 2 points to the source selection checkboxes (All Ohio Federal & State Cases, Combined; Ohio State Cases, Combined; Ohio Federal Cases, Combined). Callout 3 points to the 'Select sources to search' radio button. Callout 4 points to the search input field labeled 'Enter terms, sources, a citation, or shepx to Shepardize®'.

The **Explore Content** pod on the Lexis Advance 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.)
- 2 Click through the source hierarchy screens, e.g., select Ohio.
- 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** in the **Narrow By:** box. (Not shown.)
- 4 The Red 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 Red Search Box, which makes source suggestions. Select the **magnifying**

**glass icon** next to the title to add that title to the Red Search Box. **Select the title name** and move to the Advanced Search form for that content type or the Table of Contents (if applicable).

Plus, you can find a source through the Explore Content feature. (See items 1 – 4 at left.)

You can also browse and search sources:

1. Select **Browse** in the black Lexis Advance header and select **Sources**. Enter a partial title in the Sources search box.
2. Or select **All Sources**. The screen below displays.

The screenshot shows the 'Sources' search interface. It includes a search input field with a magnifying glass icon, a 'Narrow By' dropdown menu, and a list of source categories (All, A, B, C, D, E, F, G, H, I, J, K).

3. Browse titles alphabetically, by content types, jurisdictions, etc.
4. Select a **title link**. Actions display. You can click **Add source as a search filter** to add the source to your search or **Get documents** to retrieve all available source documents. Also **Create a publication alert** for many sources. To get source details, such as update schedule, select the **i** icon. To select all sources on the Browse 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 Red Search Box. The word wheel will make suggestions. Select the **magnifying glass icon** next to the title to add that title to the Red Search Box.
2. Repeat to add more sources to your search. The source combination is saved automatically in **Recent & Favorites**.

View recent searches and **create Favorites**:

- Select the **Filters** pull-down menu in the Red Search Box and select **Recent & Favorites**.
- View recently searched sources, combinations, legal topics and pre-search filters.
- **To create a Favorite**, select the star next to the title combination. The item will then remain in your Recent & Favorites list and display in the Favorites pod on the Lexis Advance home page.

You can also create Favorites in the Explore Content feature. (See left, item 3.)



## Build your search with a simple screen form

### Advanced Search

Use Advanced Search forms to build your search. Select a source title link from the Red 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 above the Red Search Box.) Each form automatically displays segment options, i.e., the parts of the document, for that content type. You can refine your search to those document parts. No need to remember segment names; just fill in the form blanks and go!

### Search with “terms and connectors”

same sex! W/10 marriage

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

Please note: Lexis Advance 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. For example, consider searching W/10 instead of W/5. For W/p and W/s, consider W/75 or W/25, respectively.

**Note:** Only the AND and & connectors work in Lexis® Web. Learn more about [searching with terms and connectors](#).

### Search within specific document parts

You can use Advanced Search forms to search document segments, i.e., specific document parts. No need to remember segment names. 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*)
- PUBLICATION–TYPE(*magazine*) AND *ukraine AND putin*
- SECTION(*financ!*) & *bitcoin*

Get more details on [searching with segments](#).

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

Use the Explore Content tabs on the Lexis Advance 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 Type	Federal	State	Practice Area or Industry
Alabama		Guam	
Alaska		Hawaii	
Arizona		Idaho	
Arkansas		Illinois	
California		Indiana	

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In addition, **Lexis Advance Practice Centers** offer more than 70 practice areas, industries and jurisdictions with links to the most-used practice content from across the LexisNexis services. Select the **Browse** pull-down menu in the black Lexis Advance header and click **Practice Centers**.

You can also link to Practice Centers from Explore Content. Just look for the Practice Centers link on source pages, e.g.:



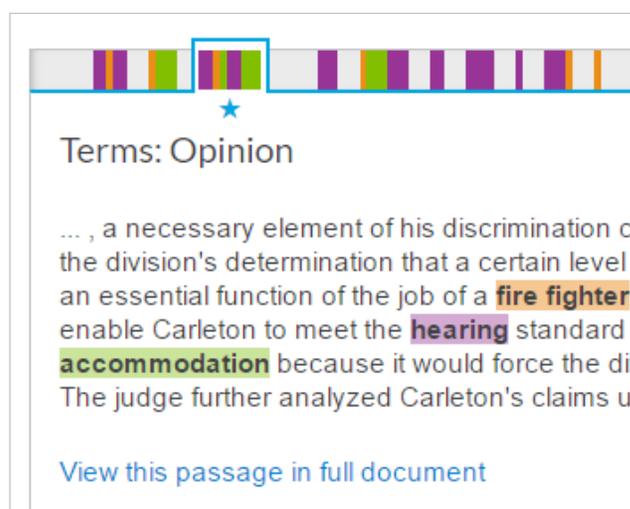
Once you select a Practice Center, you can make it your home page. Select the **Actions** pull-down menu next to the Practice Center name at the top of the Practice Center home screen and select **Make this my research start page**. You can also personalize your Practice Centers, i.e., drag, drop and relocate pods such as Key Topics.

### Assess case relevance—in color!

**Search Term Maps** at Lexis Advance automatically **color code your search words** and phrases. Every Lexis Advance 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.



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



## Find in one step

### Retrieve full-text documents by citation

Enter the citation(s) in the Red 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 above the Red Search Box. The Get a Doc Assistance feature offers **fill-in-the-blank forms** to help you retrieve the document you want.

- **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 Red 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. *Shepard's* Preview shows you the report highlights before you *Shepardize*.

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 Advance Red 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

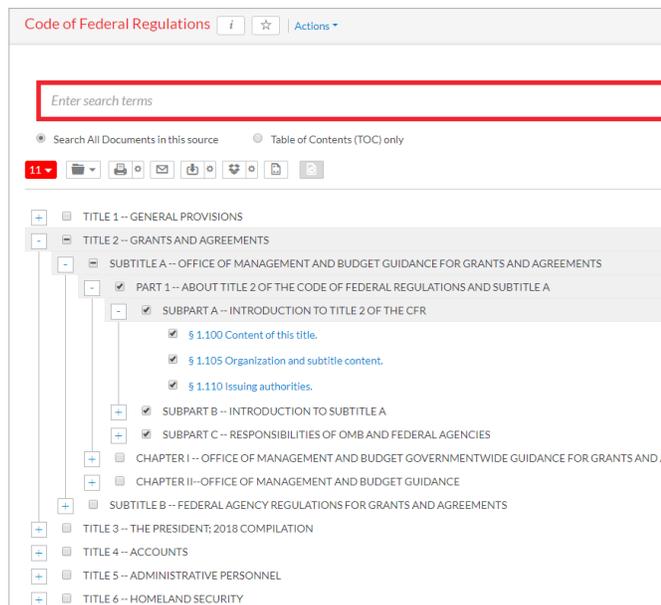
four briefs. Review the documents, look for specific words or filter by attorney, law firm and more.



## 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 Red Search Box and select the **source title's** link.
2. Identify your TOC source in Browse Sources 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 pod.

#### 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 Red Search Box. (The default is to search all source documents.)

Enter your **search terms** in the Red 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 Advance search results, e.g., you can apply post-search filters (see page 8), re-sort results documents and more.

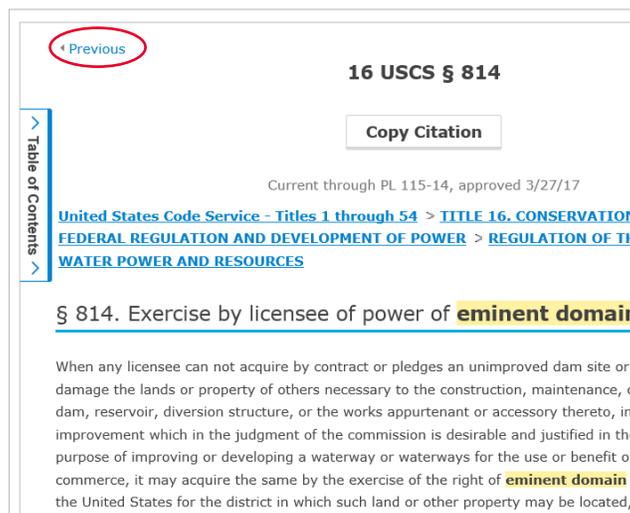
**To search or deliver specific portions of the TOC**, e.g., all the documents in a chapter or part, select the check box in front of that part or chapter. The Search Selected button under the search box is chosen automatically (not shown in the graphic at left), and the red delivery tray box shows how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



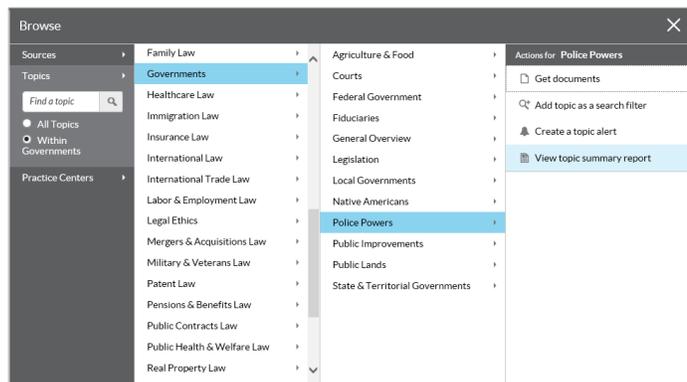
**Move to preceding or succeeding sections.** Click the **Previous** or **Next** (not shown) arrows at the top or bottom of the screens. To move to a **TOC level**, you can select a level from the **hierarchical links** at the top of the document. Or click the **Table of Contents** tab on the left side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



## Research legal topics

Research a specific legal topic  
(Browse Topics)

Select **Browse** in the black Lexis Advance header, then click **Topics**. You can search for your topic or browse a topic hierarchy.



To search for your topic:

Enter your search words in the topics search box, e.g.,  
ENTER: *police powers*, and click **Search**.

To browse for your topic:

1. Select an area of law, e.g., **Governments**.
2. Select ▶ to open subtopics.
3. Select a **topic link**. Select a task, e.g., **add the topic** to a search or set up a **topic alert** to notify you of changes in the topic documents. **View topic summary reports**, compiled by LexisNexis legal editors, pointing you to seminal cases and other vital authority, key definitions and references to secondary sources that can help bring you up to speed on a legal topic.

Find more relevant headnotes

If you find a relevant headnote in a full-text case, use the **More like this Headnote** feature to retrieve more similar LexisNexis headnotes.

As you view the relevant headnote in the full-text case, click the **More like this Headnote** link. (See graphic, below, 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—even new jury verdicts, settlements and news, etc.

Focus *Shepard's* reports to specific headnotes

**If you are reviewing a *Shepard's* report**, use the results filter options for headnotes in the report's left-hand navigation pane. Just select your headnote filter, e.g., HN17, to apply it.

**If you are viewing the headnotes** of a full-text case, just view **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. Select a **category link** (in blue) at the top of your left navigation pane.

#### Check results numbers

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

#### Refine by adding search words

Go to the **Search Within Results** box in the left pane. Enter your search terms, e.g., ENTER: *social host*.

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

#### Refine by adding filters

You can filter only one content category at a time. **Select a filter** to apply it to your results, e.g., select a court to restrict your review to cases for that court. All court and jurisdiction filters are in alphanumeric order.

To add multiple filters at once, e.g., several jurisdictions, choose **Select multiple**, make your choices and click **OK**. All added filters display in blue boxes under **Narrow By**.

Bring up to three jurisdictions or three courts to the top of your filters list. Click **Edit Settings** under Court or Jurisdiction.

To refine by date: the **Timeline** filter charts results coverage so you see trends at a glance. Just move the slider; the date in the box below the chart adjusts as you move. Or click on the calendar icons to select specific dates.

**Click the X** next to an applied filter to remove it. To remove all filters, click **Clear**.

Lexis Advance® Research

Results for: dram shop and

Cases	91
Statutes and Legislation	2,011
Secondary Materials	2,688

Show more

Narrow By

Ohio X

Clear ☆

Search Within Results

social host

Court

Select courts to display at the top of this list. Edit Settings

State > Ohio	91
Appeals Court	73
Court of Common Pleas	9
Supreme Court	9

Select multiple

Timeline

1877 2016

Jan 01, 1877 Dec 31, 2016

OK

Publication Status

Sources

Practice Areas & Topics

Attorney

### 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.

- Copy (Quick) : Standard
- Copy (Advanced)
- Add to folder
- Add to search
- Annotate
- Highlight



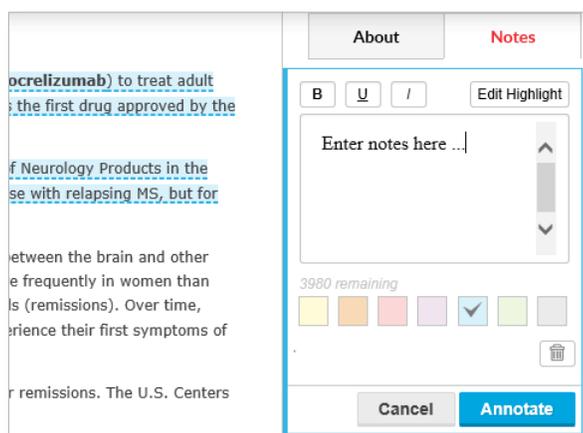
## Annotate results documents

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.*

The 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.



## Sign in

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## Learn more

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## 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 red box keeps count. You can also deliver a results list of 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:



**Print:** Select the Options wheel to choose options, e.g., to format (fonts, search terms in bold, etc.), show headnotes in cases, etc. You can also save steps and bypass options screens too. Just click the **Print (current settings)** icon.



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



**Download or send to Dropbox®:** Click the Options wheel to choose options, e.g., 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®.



Save steps and bypass options screens too. Just click the **Download (current settings)** or **Send to Dropbox (current settings)** icon.

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



**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).