

Lexis Advance® User Guide



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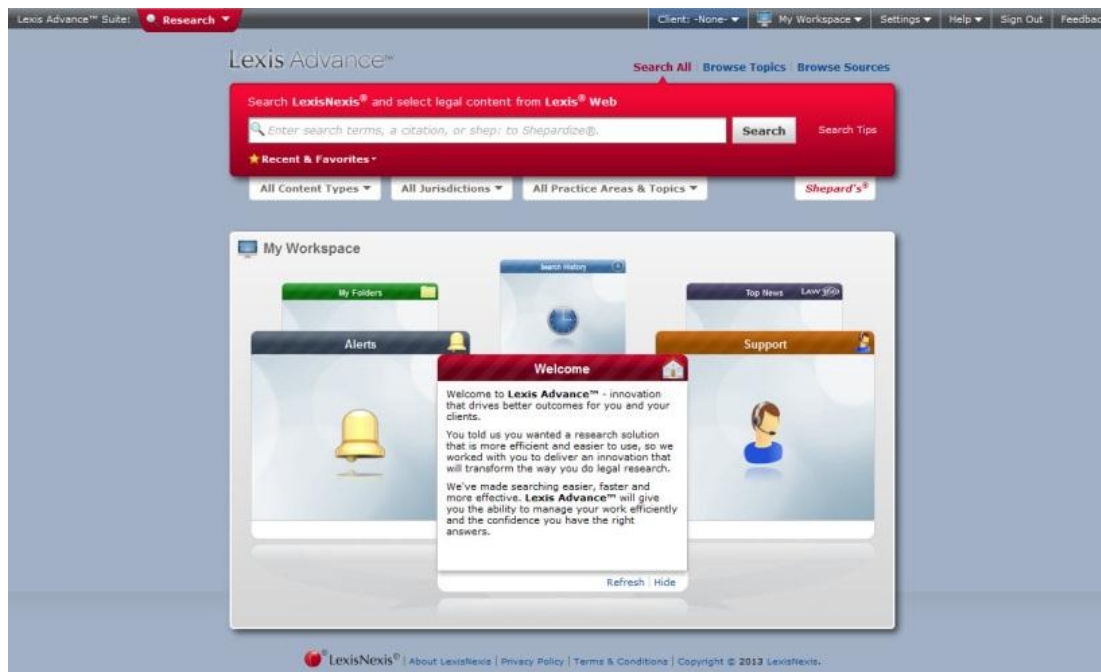
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About Lexis Advance®

What is Lexis Advance®?

Lexis Advance® is a legal research solution that is efficient and easy to use, and includes the following product features.

- Simplified search box
- No source selection needed, but if you choose, you can limit your results by source, content type, jurisdiction, or practice area or topic.
- *Shepard's*® Citations Service
- Work folders for organizing your research
- Legal issue trail
- LexisNexis® and Web content searching



Searching with Lexis Advance®

What is a Lexis Advance® search?

You can use Lexis Advance® to search LexisNexis® sources and related Web content or to *Shepardize*® a citation. Use the drop-down lists under the search box to limit search results to specific:

- Content types
- Jurisdictions
- Practice areas and topics

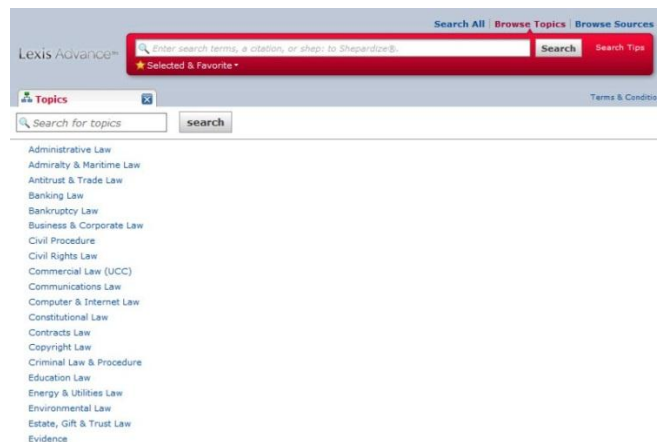
Select the Search Tips link to the right of the **Search** button to enter or add to your search terms.

How do I search using Lexis Advance®?

To begin your legal research across all available LexisNexis® primary and secondary sources, plus related content on the Web, follow the steps below.

To search using search terms:

1. If you wish, select a client from the **Client ID** link at the top of the page to associate this research with, or select **Set Client ID** to enter a new one.
2. Do one of the following:
 - To search all content, select **Search All** above the search box.
 - To search in a specific topic, select **Browse Topics** above the search box, then select the topics you want to search from the list.



- To search in specific sources, select **Browse Sources** above the search box, then select the sources you want to search from the list.

3. Enter your search terms in the search box.
4. Click **Search**.

To find an individual document when you know the citation:

1. If you wish, select a client from the **Client ID** link at the top of the page to associate this research with, or select **New Client** to enter a new one.
2. Enter the citation in the search box.

3. Click **Search**

To *Shepardize*[®] a citation:

1. Select the **Shepard's**[®] tab under the search box, or type *shep* followed by a colon (:), followed by the document citation.



Example:

shep: 800 F.2d 111

Example:

shep: 410 us 73

Punctuation, spacing, and capitalization within the citation are optional. However, the colon following "shep" is mandatory in order for the system to run a *Shepard's* search and not a regular search.

2. Click **Search**.

To display a form you can use to construct your search to include or exclude specific words or phrases:

1. Click **Search Tips**.



2. Complete the Search Tips form.
2. Click **OK**.

How do I select a specific source to search in?

You can select up to 20 sources in which to search.

1. On the landing page, select **Browse Sources** above the search box.

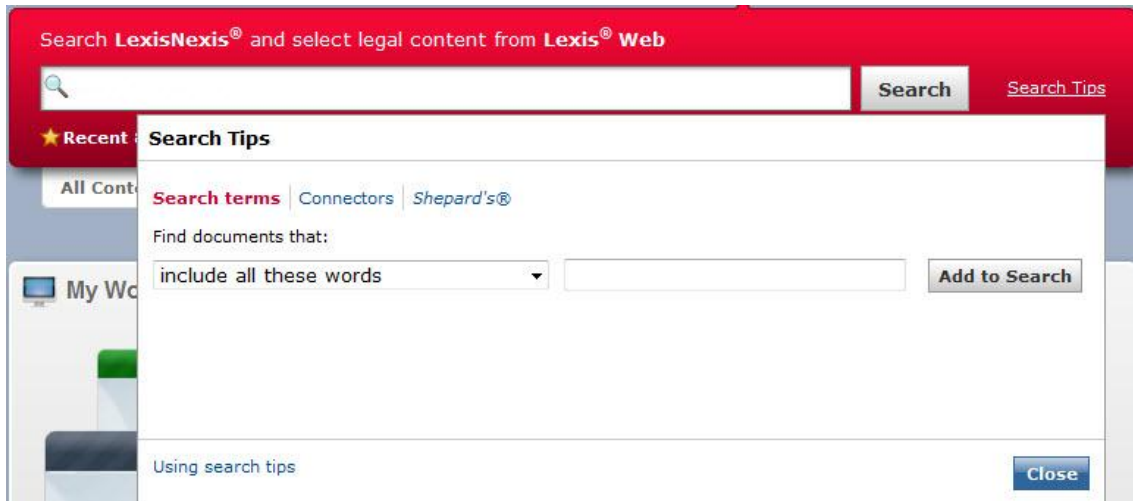
2. When the source list displays, do one of the following:

Browse for a source	At the top of the list of sources, select the first letter of the name of the source you want to search in.
Search for a source when you know the name	Under Narrow by... in the left pane, type the name of a source, or part of the name, in the box under Search Sources and click Go .

3. Select the name of the source you want to search in.
4. Select **Add this source to the search**.

The source name is added just under your search terms on the search box. You can also click **Selected & Favorite** to see the sources you have selected to search in or saved as favorites.

Using Search Connectors and Commands



Tip:

- To review all of the information about connectors and commands on a single page, see [Search Connectors Quick Reference Card](#).
- For information on how the wildcard characters * and ? are used in a search, see [Finding Variations of a Word](#).
- To understand connector priority, see [Connector Order and Priority](#).

Search connectors, such as `and`, `or`, `near`, and `not`, and commands, such as `at least`, help narrow a search by defining relationships between your search terms.

Note:

When entering connectors or commands, don't enter them in all caps (such as `AND`). Lexis Advance® will interpret them as search terms if you do, and you won't get the results you're expecting.

Lexis Advance® automatically interprets many common legal phrases, such as "limited liability partnership" or "summary judgment", as phrases, rather than as individual search terms. However, if you want to be sure a phrase you are searching for is interpreted as a phrase, enclose it in quotation marks.

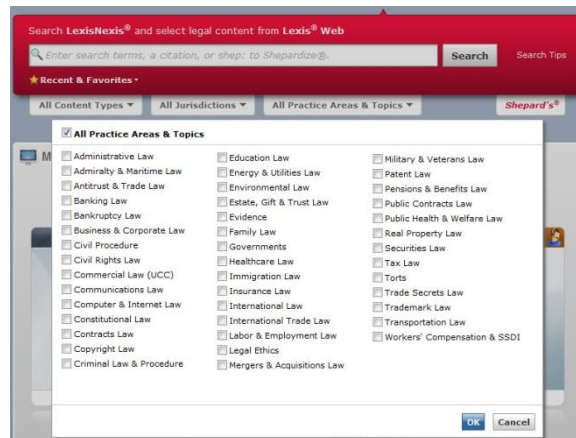
When you enter text into the *Shepard's*® **Narrow by...Search Within Results** box and click **OK**, that text is processed as a terms and connectors search.


The following articles provide descriptions and examples for each connector.

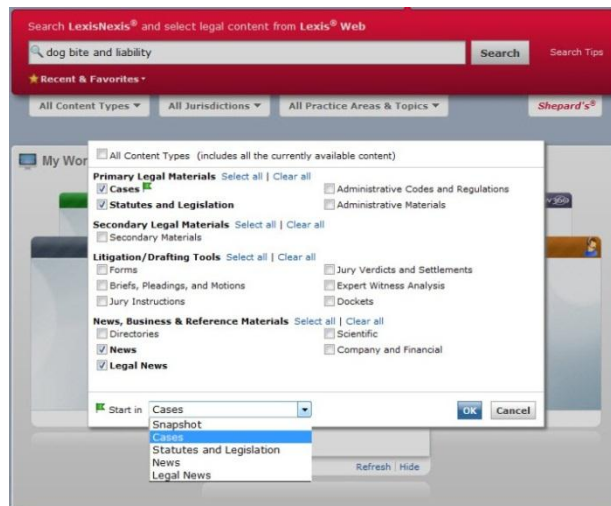
How do I restrict my search using filters?

You can restrict your search to a specific content type, jurisdiction, or practice area and topic, so you have fewer results; you can also [restrict your search to a specific source](#). When you get your results, you can narrow them further using the filters on your results page. To restrict your search, follow these steps:

1. Enter your search terms.
2. Click a drop-down list under the search box to display the filters that are available, or select a filter from the [Recent and Favorite Filters](#) panel.



3. Select one or more check boxes for the categories you want to restrict your search to. For example, to restrict your results to case law, select the **Cases** check box in the content type drop-down list. A flag () displays next to the content type you selected.





- When your results display, the content type you selected displays as the first tab. If you don't make a selection, results in the Cases content type display first.

4. Click **OK** to close the filter.
5. Click another filter and make your selections, if you want to restrict your search further.
6. Click **Search**.

The selections you make from the filters to restrict your search will be displayed below the search form and used for future searches until you change them by making different selections or selecting a favorite.

Note:

The filters you have used recently are displayed on the **Recent and Favorite Filters** panel.

- To use a filter for a search, select it. If you made any other filter selections for the search, they will be replaced.
- To remove a filter from the list, click the  to its right.
- To save a filter as a favorite, click the star () to its left. Favorite filters are saved in the list until you remove them.

To edit a filter, click **Edit** to its right.

How do I search in specific segments?

In Lexis Advance®, all documents of the same type have a common structure, composed of the natural parts or divisions referred to as segments. For example, cases contain name, date, court, opinion, and dissent segments, among others.

You can restrict your search to a specific part or segment of a document, such as the court that heard the case or the judge who wrote the opinion. Different types of documents have different segments. For example, a case doesn't have the same segments as a newspaper article.

To search in a specific segment, type the segment name followed by your search terms in parentheses (this example uses the "name" segment for searching by party name):

name(griggs and duke)

This spreadsheet has the complete list of segment names you can use (in the top row, shown highlighted in the image below): [Download the searchable segment spreadsheet.](#)

C	D	E	F	G	H	I	J	K	L	M	
cite	name	company	head	court	headline	congress	term	title	publicati on	summary	sect
x									x		
x									x	x	

Segment searching is especially useful when you are looking for:

- Opinions written by a particular judge
- Cases involving a specific party
- Cases in which a particular attorney or firm appeared as counsel

Which segments are searchable in Lexis Advance®?

Lexis Advance® does not search all of the same content types or segments as Lexis® (lexis.com). Below is the list of content types that can currently be searched with a segment search using Lexis Advance®. Refer to the same spreadsheet: [Searchable Segments](#) to see which segments are available in each of the content types.

- Administrative Codes and Regulations
- Administrative Materials
- Company Financial
- Directories
- Statutes and Legislation
- Briefs, Pleadings and Motions
- US Cases
- Analytical Materials
- Dockets
- Expert Witness Analysis
- Forms
- Jury Instructions
- Jury Verdicts and Settlements
- Legal News
- Scientific

Searching in a Specific Segment

1. In the search box, enter your search, beginning with the segment name and followed by your search terms in parentheses. To find opinions written by Justice Sandra Day O'Connor, enter:

Example: `writtenby(o'connor)`

2. Click **Search**.
Segment searches can be run as either a natural language or a Boolean search, depending on the search syntax you use. The table below has examples of segment searches using natural language and Boolean syntax.

To...	Type This
Find cases when you know the party names, using natural language	<code>name(griggs duke)</code>
Find a legal news story when you know the headline, using natural language	<code>headline(michael jackson death)</code>
Find cases when you know the party names, using Boolean syntax	<code>name(griggs and duke)</code>

Find cases involving the right to counsel and heard by either Judge Anderson or Judge Markey, using Boolean syntax	right to counsel and judges(anderson or markey)
Find cases argued by Jensen for which Posner wrote the opinion, using Boolean syntax	writtenby(posner) and attorney(jensen)

How do I save my research?

The search terms, documents, prints, and other activities from your research are automatically saved in your history for up to 90 days. You can access them by selecting the **History** link from **My Workspace** at the top of any page. Your last 10 searches are also available from the **Search History** panel in **My Workspace** on the home page.

If you want to save your search terms or documents from your results for an unlimited time, you can save them to **My Folders**.

After running a search and reviewing your results:

1. Do one of the following:

Save a search	From the results list, click the Options drop-down list and select Save search to folder , then select the folder you want to save it to.
Save one or more documents from the results list	Select the check box next to each document you want to save, then click the Add to folder (📁) icon at the top of your results.
Save a document from the full document view	While viewing the document, click the Add to folder (📁) icon at the top of your results.

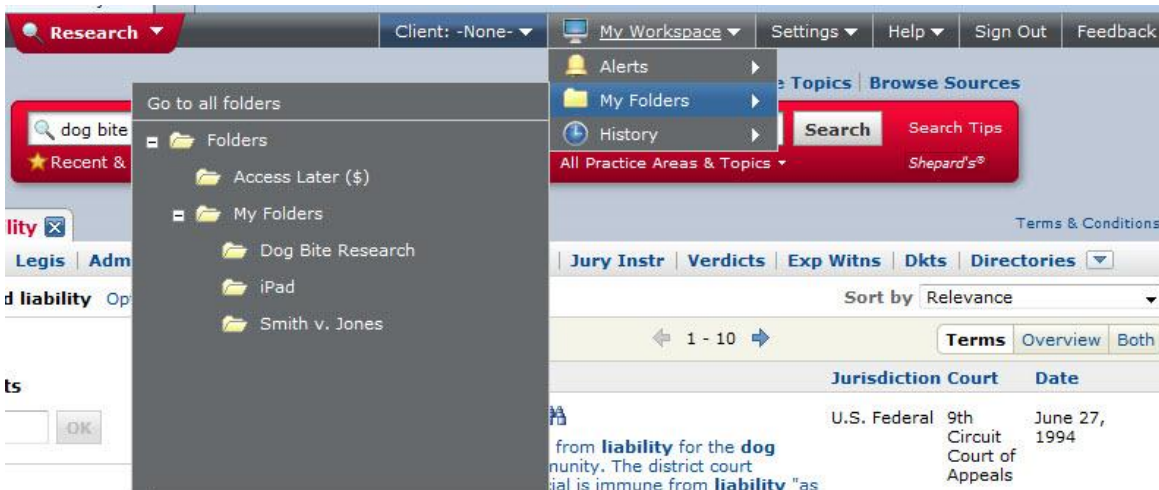
2. In the **Save to Folder** form that appears, enter a title for the items you want to save, or keep the title



3. Select the folder you want to add the items to, or click the **New Folder** icon (📁*) to create a new folder.
4. Select the client name you want to associate the items with, or click **New Client** to add a new client name to the list of clients.
5. Add any notes about your research to the **Notes** box.
6. Click **OK** to save the items.

To retrieve your saved items, select the **My Folders** link from **My Workspace** at the top of any page or select the **My**

Folders panel from **My Workspace** on the home page.



How do I create an alert?


An alert is a search that runs automatically, and notifies you of any results at intervals you specify. To create an alert, first run a search or *Shepardize*® a citation.

Tip:

To get the best, on-target alert results, refine your search before saving it as an alert. Here are some suggestions:

- Use search terms that are specific to your research, joined by connectors to define the relationships of the search terms.
 medical negligence OR clinical negligence
- Avoid terms that are too general, such as "illness" or "behavior".
- Filter your results before creating your alert. On the results page, select from the filters in the left pane to specify the jurisdiction, time frame, practice area, and so on, that you want to focus on.

When you have the results you want:

- From your search results, select the **Options** drop-down list and select **Create an alert**, or select the alert icon  at the top right of your results.
- From a *Shepard's*® report, click **Create an alert** next to the alert icon.

Appellate History	Court	Date
Prior		
1. Mink v. EPA 1971 U.S. Dist. LEXIS 15238 Show on Map	D.D.C.	Aug. 27, 1971
2. Reversed by and Remanded by: Mink v. Environmental Protection Agency 464 F.2d 742, 150 U.S. App. D.C. 233, 1971 U.S. App. LEXIS 7576, 3 Env't Rep. Cas. (BNA) 1166, 1 Env'tl. L. Rep. 20527 Show on Map	D.C. Cir.	1971
3. Citation you Shepardized™. Reversed by: EPA v. Mink 410 U.S. 73, 93 S. Ct. 827, 35 L. Ed. 2d 119, 1973 U.S. LEXIS 136, 4 Env't Rep. Cas. (BNA) 1913, 3 Env'tl. L. Rep. 20057, 1 Media L. Rep. (BNA) 2448 Show on Map	U.S.	1973

You can then specify how often you want to be notified of any results, how you want to receive the results, and other options.

You can open your alerts and review the updates from the **Alerts** panel in **My Workspace**.

Browsing Topics

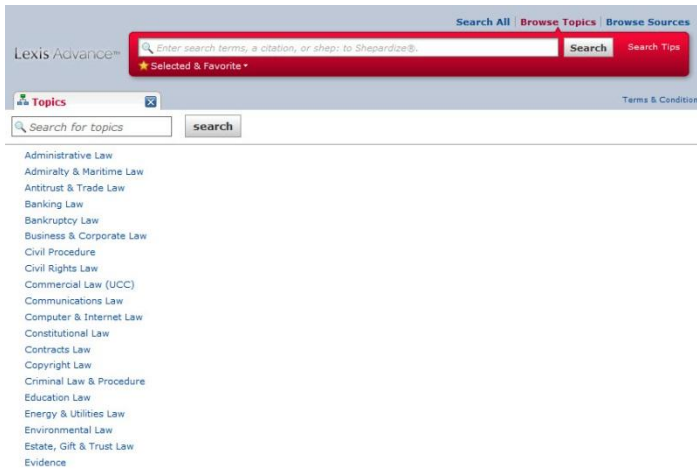
You can browse all topics by clicking the **Browse Topics** link at the top of the search page. A list of all topics is displayed, and you search for a topic or just browse through the list of topics to find the one you want to use.

Once you find your topic, you can:

- Get topic documents
- Add this topic to the search
- Favorite this topic
- Create an alert

How do I browse through all available topics?

1. Select **Browse Topics** above the search box.



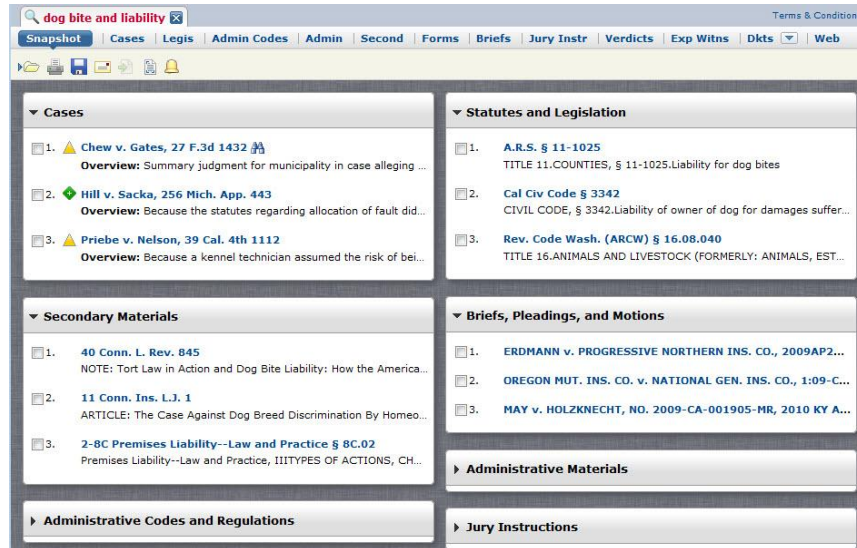
2. Select a topic from the list of all topics, or enter a topic name into the **Search for topics** box, then click the **Search** button.

Viewing Results

What is a results list?

Your search results may be presented in one of the following ways:

- For searches that retrieve multiple documents, your results display as a tabbed list of documents, with an at-a-glance view of your results on the **Snapshot** tab, and each of the other content types you selected under its own tab. The **Snapshot** tab displays first (left to right), with the results for the content type you selected as your **Start-in** type displayed immediately to the right (you can make the **Snapshot** tab your **Start-in** content type if you wish). View the results for any content type by clicking its tab.



The initial characters of your search appear as the label of the tab right below the search box (above the content type tabs), so that as you continue your research and open other tabs, you can return to your results by clicking the tab.

- If you retrieved an individual document by entering its citation in the search box, your results consist of a single document. If the document is included your subscription, it opens automatically. If it is outside your subscription, the document title displays by itself on a results tab, and you'll have the option of accessing it for a fee.

Note:

- Multiple documents retrieved by a single citation (such as table cases) display as a list of documents on a results tab.
- Occasionally, a very large document or one that contains an unusual number of embedded links doesn't open immediately, but also displays on a tab by itself.

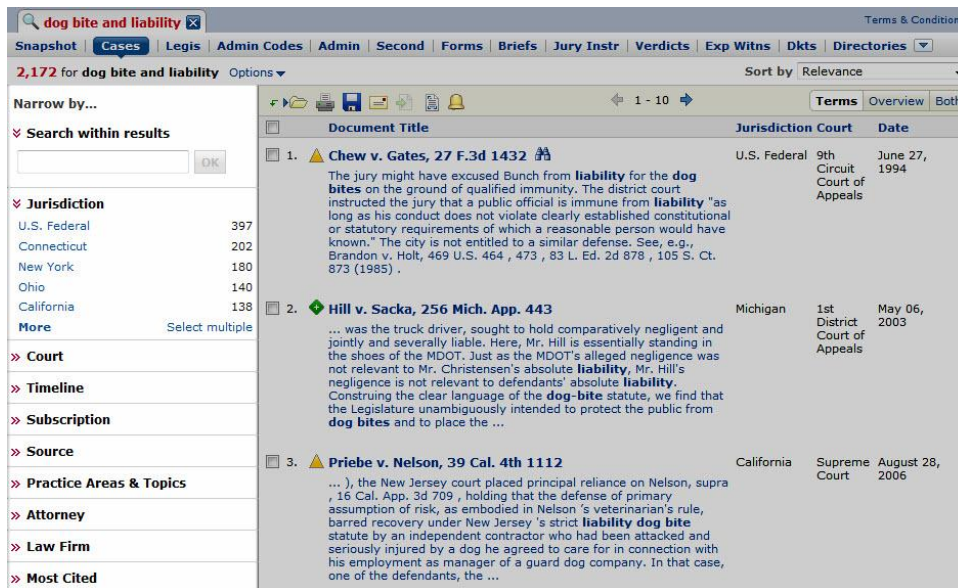
- If you enter multiple citations in the search box, your results display as a list of documents on a results tab.
- If you used the **Search for (citation)** option in **About this Document** to retrieve all documents referencing a specific citation, the documents will be displayed as a list on the results tab, regardless of any specific content type, jurisdiction, practice area, or "Start in" selections you made before your search.

You can use the **Narrow by...** pane on the left to narrow your results by entering search terms in the **Search within results** filter, or by several specific criteria, such as jurisdiction, court, time frame, and so on, depending on what kind of search you ran and what types of content your results contain.

You can also use the search form at the top of the page to change your search terms, or change the content types, jurisdictions, or topics you want to search and run the search again.

How do I narrow or filter my results after a search?

If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the **Narrow by...** pane on the left side of your results.



- Use the **Search Within Results** filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: *dog bite liability* and your answer set is very large, you might enter the terms: *assumed risk* to narrow the results to only documents that also contain those terms.
- Use the other filters, such as **Content Type**, **Jurisdiction**, **Timeline**, **Sources**, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. The filters that are available for narrowing your results depend on what kind of search you ran and what types of content your results contain. For example, if you ran a legal search, the filters in the **Narrow by...** pane include **Cases**, **Statutes**, **Court**, **Jurisdiction**, etc. If you ran a *Shepard's*[®] search, the filters include **Jurisdiction**, **Analysis**, etc.


See the table below for more information about using filters.

Note:

- If you are viewing your results on the **Cases** content type tab, **Content Type** is not displayed in the **Narrow by...** pane because your results are already narrowed to the Cases content type and can't be narrowed any further. However, some content types, such as **Analytical Materials** can be further narrowed down, so the subcategories are displayed under **Content Type** when you are viewing your results from the Analytical Materials content type tab.
- Documents may appear in more than one category. For example, case law documents would appear in the "Cases" content type, in one of the jurisdictions, one of the sources, and would also contain a number of keywords and/or citations.

After running a search and reviewing your results:


If you want to...	Do this
Narrow your results to documents containing specific search terms or a citation	Enter your search terms or a citation in the box under Search Within Results and click OK .

Narrow your results by the other filters in the Narrow by... pane	Click the item under a filter heading (such as Content, Legal Topic, Jurisdiction, etc.) that you want to restrict your results to, and click OK . For example, to restrict your results to case law only, click Cases under Content.
Narrow by more than one category under a filter	Click Select multiple , select the check boxes for the categories you want to narrow your results to, and click OK .
Restrict your results to a particular date range	Under the Timeline filter of the Narrow by... pane, use your mouse to move either of the sliders to the left or right until the date range you want is displayed, or enter the dates in the the year fields, and click OK .
Return to a previous results set	Click the Close icon () next to your selections at the top of the Narrow by... pane to close that version of your results.
Return to your original results after narrowing them one or more times	Click the Clear all link next to You've selected at the top of the Narrow by... pane.
Find your original or Search Within Results search terms in a document	Open a document from your results, and select the terms you want to find from the Navigate tool at the bottom right side of the document.

Note:-----

Each time you narrow your results, the results are cumulative. For example, you can narrow your results to **Cases**, then to a specific time line within those cases, and then to a specific jurisdiction or court within those cases in the timeline.

How do I get back to my previous results after narrowing them one or more times?

To return to previous versions of your results one step at a time, click the Close icon () next to each of your selections at the top of the **Narrow by...** pane.

To return to your original results after narrowing them one or more times, click the **Clear** link next to **You've selected** at the top of the **Narrow by...** pane.

How do I restrict my results to a specific date range?

You can restrict your results to a particular date range from the results view.

1. Submit your search request and review your results.
2. In the **Timeline** section of the **Narrow your results** pane,
 - Use your mouse to move either of the sliders to the left or right until the date range you want is displayed.
 - Enter a beginning year and an ending year in the date boxes and click **OK**


Your results re-display with only those documents that fall within the date range you selected.

To return to your original results set, click the Close icon () next to the list of dates displayed at the top of the **Narrow by...** panel.


How do I download results?

You can download documents selected from your results list, or download a document you have open. To view your downloaded documents, click **My Workspace** and then **History**. Your document download is shown in the list of your activities (with the type **Download**). Click **Retrieve Items** to view it.

From your results list:

1. Select the check boxes for the documents you want to download.
2. Click the download icon ().
3. Complete the download form and click **OK**. For detailed information about completing the form, see [download documents page](#).

From an open document:

1. Click the download icon ().
2. Complete the download form and click **OK**. For detailed information about completing the form, see [download documents page](#).

Note:

You can also download documents by selecting the check boxes for the documents you want to download, then clicking the link in parentheses next to the delivery icons:




This opens the delivery tray, where you can remove any documents you no longer want, and then click the download icon to deliver the documents in the tray


How do I email results?

You can email documents selected from your results list, or a document you have open, to yourself or others.

From your results list:

1. Select the check boxes for the documents you want to email.
2. Click the email icon at the top of the page ().
3. Complete the email form and click **OK**. For detailed information about completing the form, see [email documents page](#).

From an open document:

1. Click the email icon ()
2. Complete the email form and click **OK**. For detailed information about completing the form, see [email documents page](#).

Note:

You can also email documents by selecting the check boxes for the documents you want to email, then clicking the link in parentheses next to the delivery icons:




This opens the delivery tray, where you can remove any documents you no longer want, and then click the email icon

What is the delivery tray?

The delivery tray collects and temporarily stores documents you select to download, email, or save to a folder later.

As you review the results of your searches, you'll find documents you may want to download, email to yourself or someone else, or save in a work folder. To save a document to the delivery tray, select the check box next to its name in the results list. The number of documents currently stored in the delivery tray displays in parentheses to the right of the

delivery icons above the document list, like this:  (6 selected)

When you're finished reviewing your results, you can click the **n selected** link to display the contents of the delivery tray, remove any documents you no longer want, then click the folder, download, or email icon to deliver the documents in the tray.

You may select up to 100 documents to store in the delivery tray.

Note:

Documents are saved in the delivery tray until you remove them, or until you sign out of (or close) Lexis Advance®. When you sign out or close the application, all documents are removed from the tray.



How do I save my research?


The search terms, documents, prints, and other activities from your research are automatically saved in your history for up to 90 days. You can access them by selecting the **History** link from **My Workspace** at the top of any page. Your last 10 searches are also available from the **Search History** panel in **My Workspace** on the home page.

If you want to save your search terms or documents from your results for an unlimited time, you can save them to **My Folders**.

After running a search and reviewing your results:

1. Do one of the following:

Save a search	From the results list, click the Options drop-down list and select Save search to folder , then select the folder you want to save it to.
Save one or more documents from the results list	Select the check box next to each document you want to save, then click the Add to folder () icon at the top of your results.
Save a document from the full document view	While viewing the document, click the Add to folder () icon at the top of your results.


2. In the **Save to Folder** form that appears, enter a title for the items you want to save, or keep the title that is displayed.
3. Select the folder you want to add the items to, or click the **New Folder** icon () to create a new folder.
4. Select the client name you want to associate the items with, or click **New Client** to add a new client name to the list of clients.
5. Add any notes about your research to the **Notes** box.
6. Click **OK** to save the items.

To retrieve your saved items, select the **My Folders** link from **My Workspace** at the top of any page or select the **My Folders** panel from **My Workspace** on the home page.

How do I create a new folder?

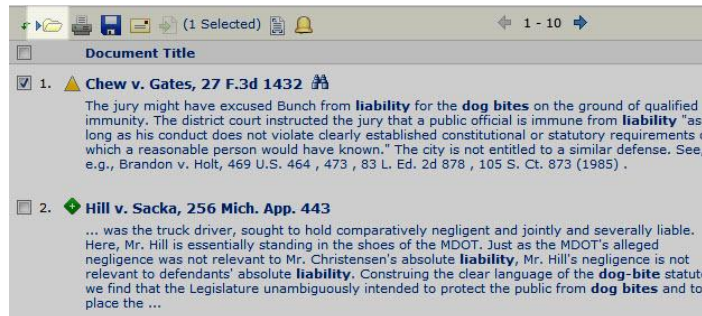
You can create a new client or project folder from the Lexis Advance® home page, from your results, or from your folders.

From the home page:

1. Select the **My Folders** panel in **My Workspace**, and navigate to the level where you want to create the new folder.
2. Click the **New Folder** icon ().
3. In the **Create New Folder** form that displays, type a name for the folder.
4. Click the **OK** button.


From a results page:

1. Select the check box next to the document you want to save to a folder, and click the folder icon at the top of your results.
2. On the **Save to Folder** form that displays, Click **New Folder**.
3. In the **Create New Folder** form that displays, type a name for the folder.



4. Select the location in your folder structure for this new folder.
 - a. Select **At the top level** to create this folder at the highest folder level.
 - b. Select **In this folder** to make the new folder a subfolder of an existing one, then select the existing folder you want to create the new one in.
5. Click the **OK** button.

From My Folders,

1. In the left pane, click the **New Folder** icon ()
2. In the **Create New Folder** form that displays, type a name for the folder.
3. Select the location in your folder structure for this new folder.
 - a. Select **At the top level** to create this folder at the highest folder level.
 - b. Select **In this folder** to make the new folder a subfolder of an existing one, then select the existing folder you want to create the new one in.
4. Click the **OK** button.

Working with the Full Document



What is a full document page?

When you select a document from your results, the full text of the document displays as a tabbed page. The pane to the right of the document provides tools for saving the document, the citation, or text you select, to a folder, plus access to the Legal Issue Trail so you can track the legal issues addressed in the case law document. Your results list is accessible from another tab, so that as you continue your research you can return to either one by clicking a tab.

How do I save a document from my results to a folder?

After running a search and reviewing your results:

1. Do one of the following:

Save one or more documents from the results list	Select the check box next to each document you want to save, then click the Add to folder () icon at the top of your results.
Save a document from the full document view	While viewing the document, click the Add to folder () icon at the top of your results.

2. Select **Save In** to select whether you want to save the documents from your results list, or just the results list.
3. Select the folder you want to add the items to, or select **Create new folder** to create a new folder.
4. Select **Share** to select users to share the document with.
5. Select **Notes** to add any notes about the document.
6. If this is a shared folder, and you want the notes to be visible to the other users you have shared the folder contents with, leave **Allow recipients to view your notes** checked. If you want the notes to be visible only to you, clear the check box.
7. Click **OK** to save the items.

The items will be saved for you to access from the **My Folders** link in **My Workspace** at the top of the page, or from the **My Folders** panel in the **My Workspace** area of the home page.

Note:

You can also save documents to a folder by selecting the check boxes for the documents you want to save, then clicking the link in parentheses next to the delivery icons:




This opens the delivery tray, where you can remove any documents you no longer want, and then click the folder icon to save the documents in the tray


How do I email results?

You can email documents selected from your results list, or a document you have open, to yourself or others.

From your results list:

1. Select the check boxes for the documents you want to email.
2. Click the email icon ().
3. Complete the email form and click **OK**. For detailed information about completing the form, see [email documents page](#).

From an open document:

1. Click the email icon ().
2. Complete the email form and click **OK**. For detailed information about completing the form, see [email documents page](#).

Note:

You can also email documents by selecting the check boxes for the documents you want to email, then clicking the link in parentheses next to the delivery icons:



This opens the delivery tray, where you can remove any documents you no longer want, and then click the email icon to deliver the documents in the tray.

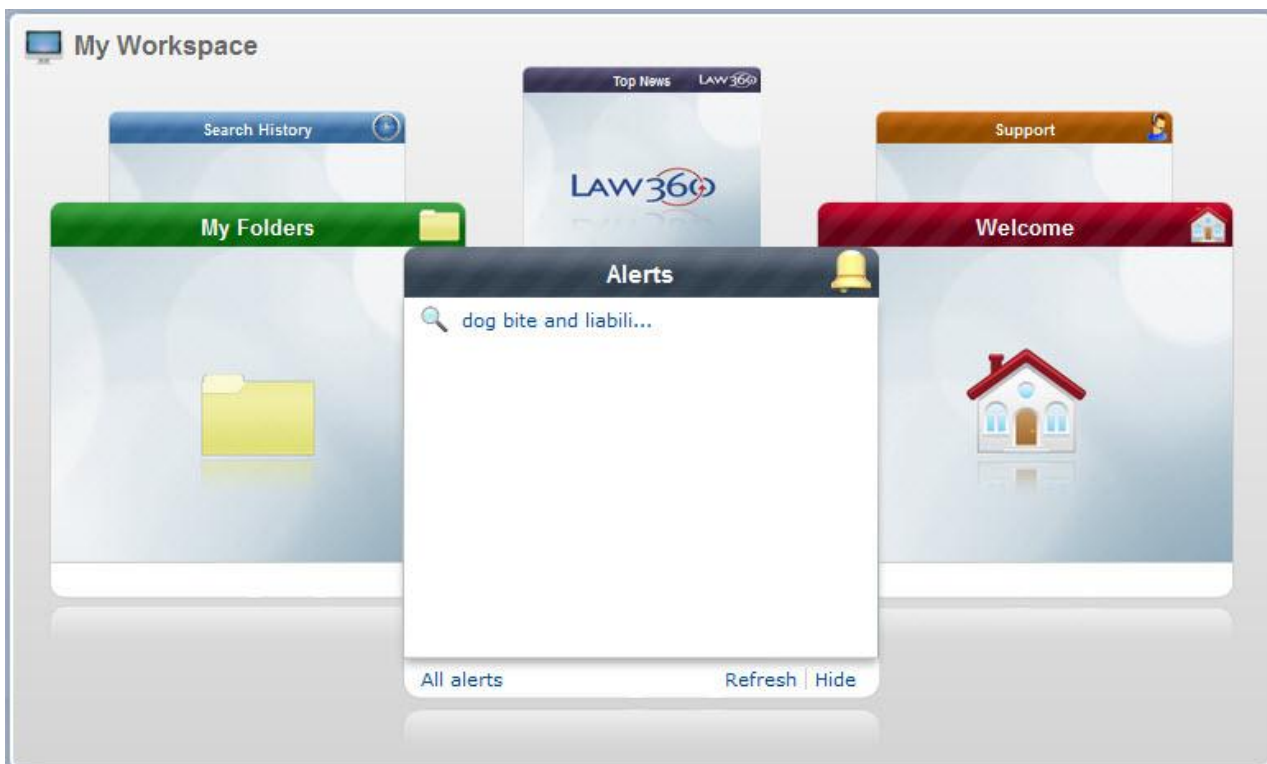
Working with Alerts

What is an alert?

An alert is a search you save to run automatically at intervals you specify. You can create the following types of alerts (the alert type that is created is the same as the type of search you ran):

- Search
- Topic
- *Shepard's*[®]
- Compare Search Results
- Find Similar Documents

To set up an alert, first run a search, then select **Create an alert** from the Options drop-down list on the results page (or next to the alert icon  at the top right of the page).



How do I create an alert?


An alert is a search that runs automatically, and notifies you of any results at intervals you specify. To create an alert, first run a search or *Shepardize*® a citation.

Tip:


To get the best, on-target alert results, refine your search before saving it as an alert. Here are some suggestions:

- Use search terms that are specific to your research, joined by connectors to define the relationships of the search terms.
medical negligence OR clinical negligence
- Avoid terms that are too general, such as "illness" or "behavior".
- Filter your results before creating your alert. On the results page, select from the filters in the left pane to specify the jurisdiction, time frame, practice area, and so on, that you want to focus on.

When you have the results you want:

- From your search results, select the **Options** drop-down list and select **Create an alert**, or select the alert icon  at the top right of your results.
- From a *Shepard's*® report, click **Create an alert** next to the alert icon.

You can then specify how often you want to be notified of any results, how you want to receive the results, and other options.

 **Create New Search Alert** [Tips](#)

Title

Search Terms
dog bite and liability

Client
-None- [Set Client](#)

Monitor	Monitor for New Documents	
<input type="checkbox"/> All Content types	<input type="checkbox"/> Cases	<input type="checkbox"/> Legis
<input checked="" type="checkbox"/> Cases	<input type="checkbox"/> Admin Codes	<input type="checkbox"/> Admin
<input type="checkbox"/> Admin Codes	<input type="checkbox"/> Second	<input type="checkbox"/> Forms
<input type="checkbox"/> Second	<input type="checkbox"/> Briefs	<input type="checkbox"/> Jury Instr
<input type="checkbox"/> Briefs	<input type="checkbox"/> Verdicts	<input type="checkbox"/> Exp Witns
<input type="checkbox"/> Verdicts	<input type="checkbox"/> Directories	<input type="checkbox"/> News
<input type="checkbox"/> Directories	<input type="checkbox"/> Legal News	<input type="checkbox"/> Science
<input type="checkbox"/> Legal News	<input type="checkbox"/> Company	<input type="checkbox"/> Web
<input type="checkbox"/> Company		

Note: The alert will monitor for the content types selected here, plus all the items under **You've Selected** in your results.

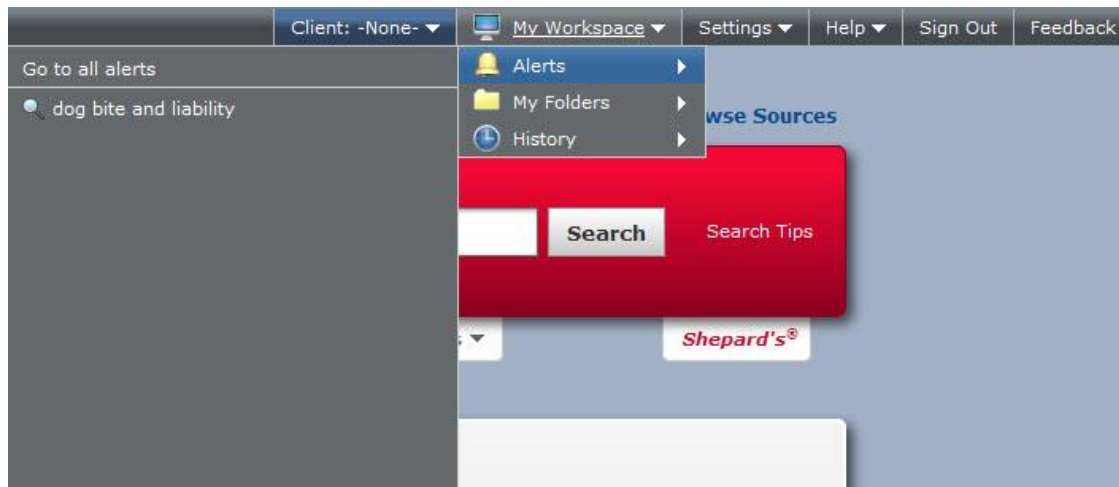
Distribution is subject to [Terms & Conditions](#)

You can open your alerts and review the updates from the **Alerts** panel in **My Workspace**.

How do I view the results of an alert?

To view the results of an alert,

1. Do one of the following:
 - On the Lexis Advance® home page, select the **Alerts** panel.
 - Select the **Alerts** link from **My Workspace** at the top of any page.
 - Select **Go to all alerts**.



2. Select the alert for which you want to view the results.

How do I edit an alert?

You can change your selections for the following options on an existing alert:

- Title
- Changes the alert is monitoring for (*Shepard's*® alerts only)
- Client
- How you want this citation to be monitored
- How often you want to be notified of any results
- Duration of the alert
- Notification options
- Sharing options

1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** panel, or select the **Alerts** link from **My Workspace** at the top of any page and select **Go to all alerts**.
2. Select the **Edit** link under the title of the alert you want to edit.
3. When the **Edit Alert** box opens, make your changes and click **Save**.

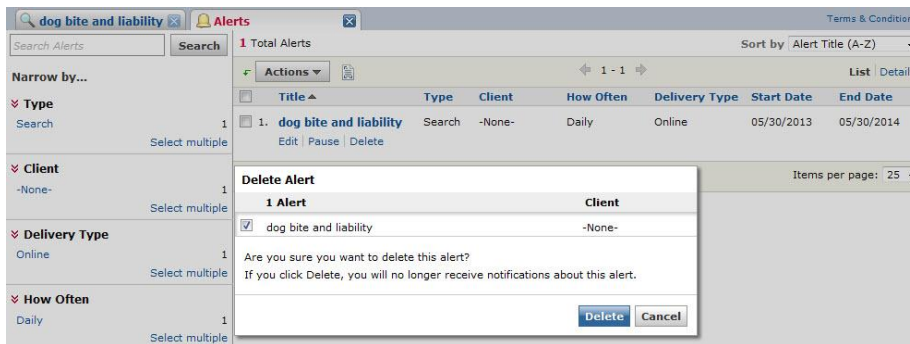
Note:

You can also select **Edit alert** from the **Properties** drop-down list on an alert results page.

How do I delete an alert?

To delete an alert you no longer want to run, follow the steps below.



1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** panel, or select the **Alerts** link from **My Workspace** at the top of any page and select **Go to all alerts**.
2. Do one of the following:
 - Select the **Delete** link the alert you want to delete.



- Select the check box for the alert you want to delete, then open the **Actions** drop-down list and select **Delete**.
3. When the **Delete Alert** box opens, click **Delete**.

How do I share an alert with other users?


You can share alert with other users. After running a search and reviewing the results,

1. Select the **Options** drop-down list and select **Create an alert**, or select the alert icon  at the top right of your results.
2. Select the options you want in the **Monitor** and **Deliver** sections.
3. Select **Share**.
4. Enter a user's first or last name or email address to find it in the list and add it to the list of selected users.
5. In the **Shared With** list, for each user, select **Editor** or **Viewer**. Editors may view and modify notes you save with the alert, and add notes of their own. Viewers may only view notes.
6. Click  to remove any users from the selected list.
7. Click **Save**.

The users you have shared with will be notified by email, and will find the document in their **Shared by Others** folder. You'll find the document in your **Shared by Me** folder.

How do I share an existing alert with other users?

You can share an existing alert with other users.

1. Select **Alerts/Go to all alerts** from **My Workspace** at the top of any page.
2. Select the alert you want to share.
3. Select **Edit**.
4. Select **Share**.
5. Enter a user's first or last name or email address to find it in the list and add it to the list of selected users.
6. In the **Shared With** list, for each user, select **Editor** or **Viewer**. Editors may view and modify notes you save with the alert, and add notes of their own. Viewers may only view notes.
7. Click  to remove any users from the selected list.
8. Click **Save**.

The users you have shared with will be notified by email, and will find the document in their **Shared by Others** folder. You'll find the document in your **Shared by Me** folder.

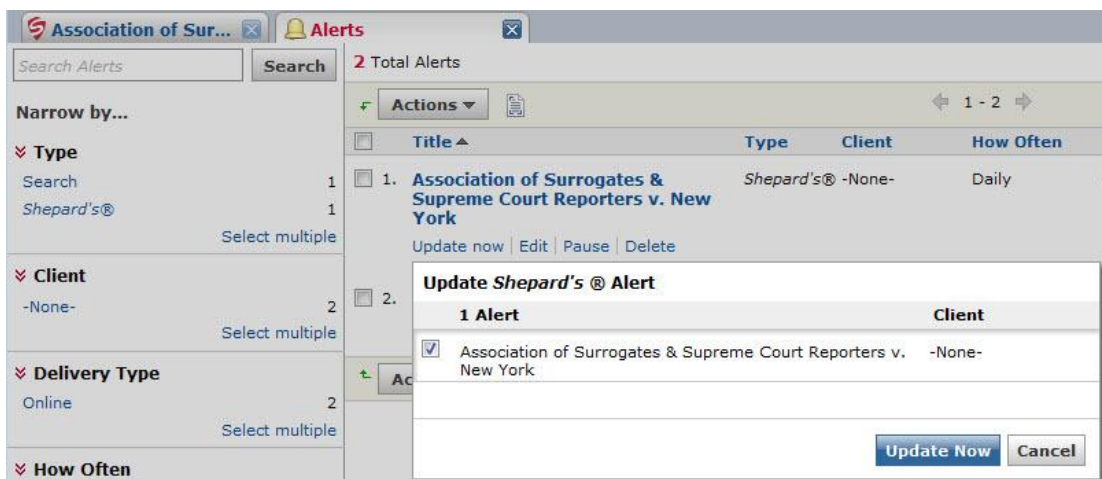
How do I update a *Shepard's*[®] alert?

Note:

Only *Shepard's*[®] alerts can be updated manually. Search alerts are updated automatically according to the update schedule you set up when you created the alert.

You can update, or run, a *Shepard's* alert to check for changes in between dates it is scheduled to run automatically. To update an alert,

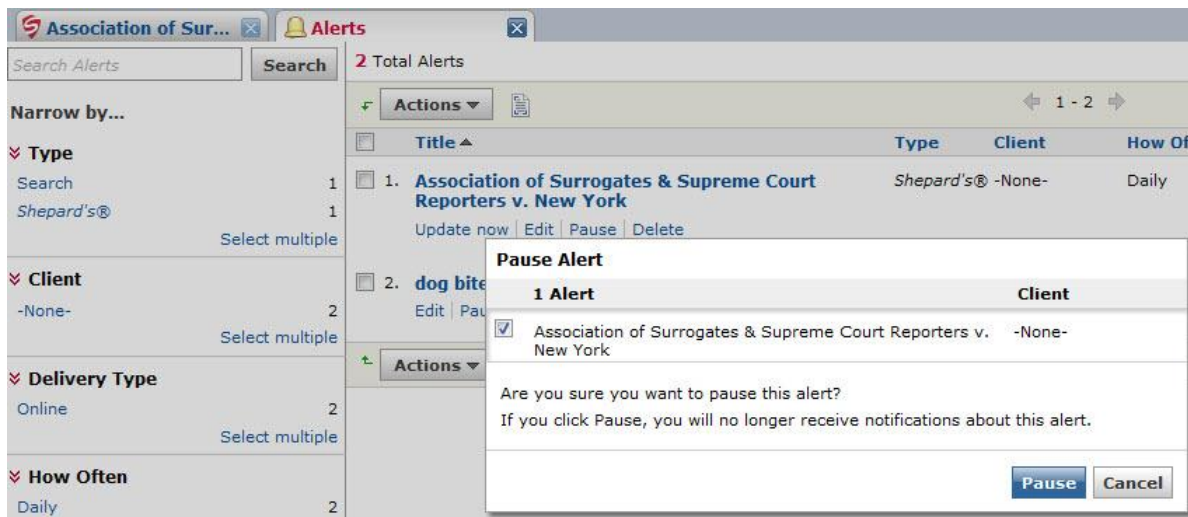
1. On the Lexis Advance[®] home page, select **View all alerts** from the **Alerts** panel, or select the **Alerts** link from **My Workspace** at the top of any page and select **Go to all alerts**.
2. Do one of the following:
 - Select the **Update** link under the title of the alert you want to update.
 - Select the check box for the alert you want to update, and then open the **Actions** drop-down list and select **Update**.
3. When the **Update Alert** box opens, click **Update**.



How do I pause an alert?

You can temporarily stop an alert and restart it later. If you pause an alert, you won't receive notifications about it during the period it is paused. Details for paused alerts are shown in grayed-out text in your list of alerts. To pause an alert,

1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** panel, or select the **Alerts** link from **My Workspace** at the top of any page and select **Go to all alerts**.
2. Do one of the following:
 - Select the **Pause** link under the title of the alert you want to pause.

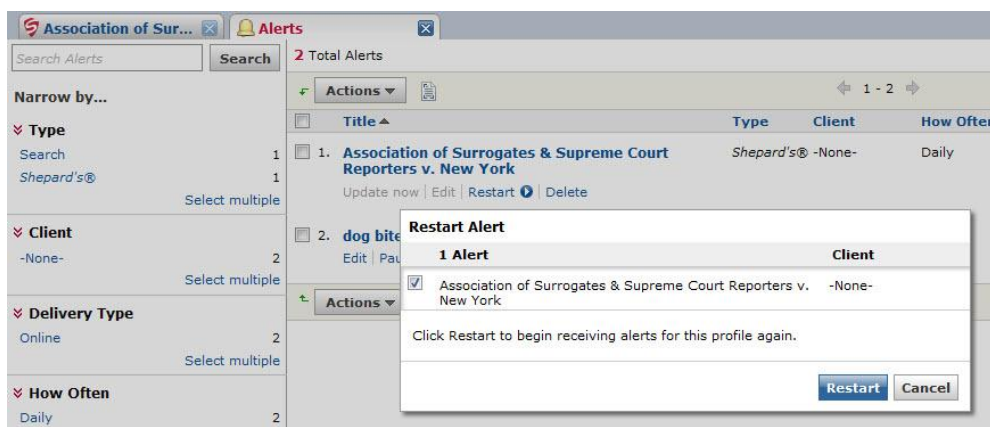


- Select the check box for the alert you want to pause, and then open the **Actions** drop-down list and select **Pause**.
3. When the **Pause Alert** box opens, click **Pause**.

How do I restart an alert?

You can restart an alert you have paused, to begin receiving notifications about it again. To restart an alert,

1. On the Lexis Advance® home page, select **View all alerts** from the **Alerts** panel, or select the **Alerts** link from **My Workspace** at the top of any page and select **Go to all alerts**.
2. Do one of the following:
 - Select the **Restart** link under the title of the alert you want to restart.
 - Select the check box for the alert you want to restart, and then open the **Actions** drop-down list and select **Restart**.

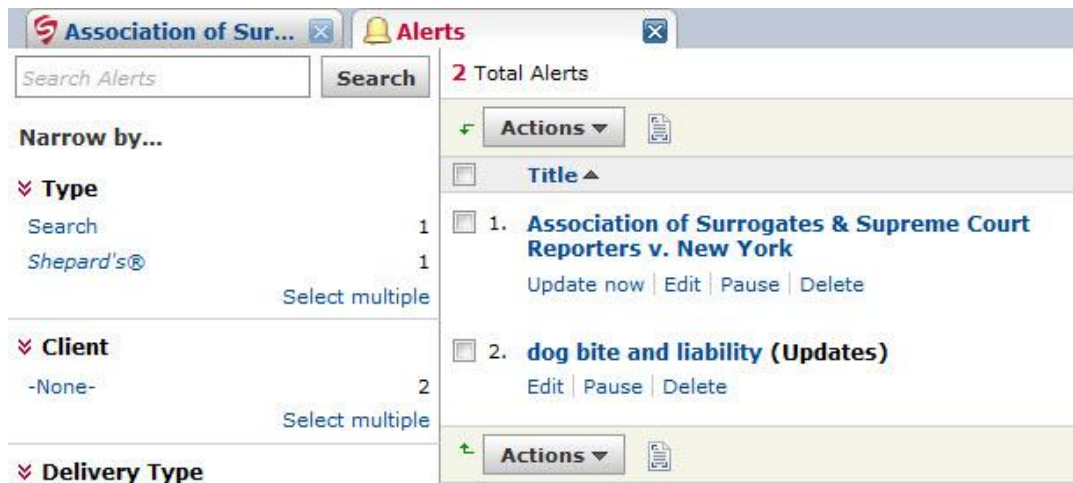


3. When the **Restart Alert** box opens, click **Restart**.

How do I find a specific alert?

You can search your saved alerts to find a particular alert, search terms, or other words or phrases. To search your alerts, follow the steps below.

1. Select the **Alerts** link from **My Workspace** at the top of any page, then **Go to all alerts**.
2. In the **Search Alerts** box at the top left of the page that displays, type the words you want to search for and click **Search**. For example, you can enter the name (or part of the name) of an alert, a term or terms from a previous search, a client ID, and so on.



The screenshot shows a web interface for managing alerts. At the top, there are two browser tabs: 'Association of Sur...' and 'Alerts'. Below the tabs is a search bar with the text 'Search Alerts' and a 'Search' button. To the right of the search bar, it says '2 Total Alerts'. Below the search bar is a 'Narrow by...' section with three filters: 'Type' (with options 'Search' and 'Shepard's®'), 'Client' (with option '-None-'), and 'Delivery Type'. To the right of the filters is a list of alerts. The first alert is '1. Association of Surrogates & Supreme Court Reporters v. New York' with options 'Update now | Edit | Pause | Delete'. The second alert is '2. dog bite and liability (Updates)' with options 'Edit | Pause | Delete'. There are 'Actions' buttons at the top and bottom of the alert list.

3. When your results display, click **Clear Search** above your results to return to the alerts page you were viewing before searching your alerts.

History Feature of Lexis Advance®

What is the history feature?

Your searches, search terms, documents, deliveries, and other activities are automatically saved in the history for up to 90 days. You can display your research history in a list view or a graphic ("map") view. You can access history by selecting **My Workspace** at the top of any page, then **History** and **Go to all history** or **Go to Research Map**. Or, on the home page, select the **Search History** panel, then select **List View** or **Research Map** at the bottom.

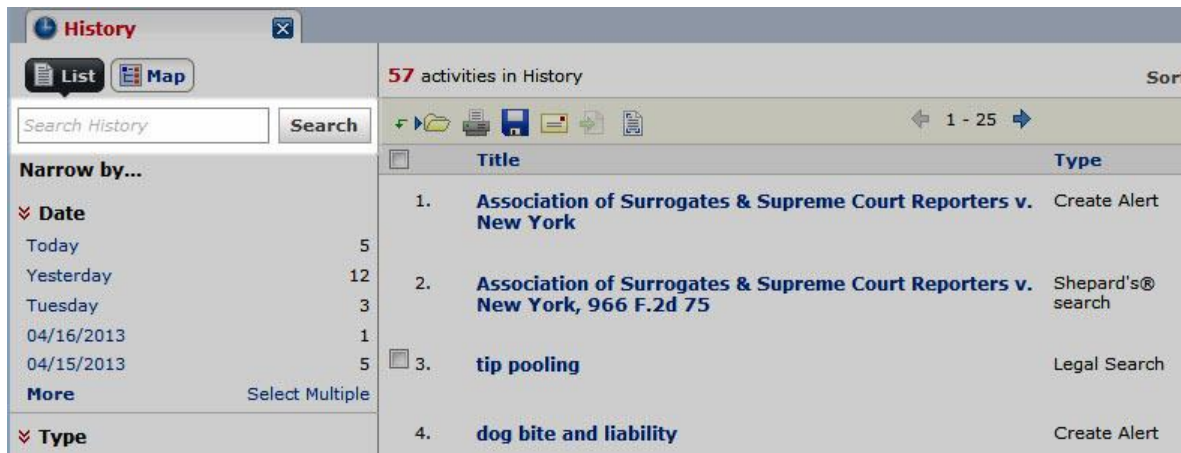
Your last 10 searches are listed on the **Search History** panel in the **My Workspace** area of the home page. Select a search to display the results for it, or select **Go to all search history** to display your searches from the last 90 days.

To save any of these activities for an unlimited time, create a folder in which to store them.

How do I find an item in my history?

You can search your history to find a previous search or search terms, a document from your results, a page you printed, or any other activity from up to the last 90 days.

1. Select the **History** link from **My Workspace** at the top of any page.
2. In the **Search History** box at the top left of the page that displays, type the words you want to search for and click **Search**. For example, you can enter the name (or part of the name) of a document, a document citation, a term or terms from a previous search, a client/matter ID, and so on.
3. When your results display, click **Clear Search** above your results to return to the history page you were viewing before searching your history.



Using the *Shepard's*® Citations Service

What is a *Shepard's*® citation search?

The *Shepard's*® Citation Service provides a comprehensive report of the cases, statutes, secondary sources, and annotations that cite your authority, including more recent cases that rely on your starting case. You can use this report to quickly validate your research and ensure you have good law.

Shepard's editors assign editorial analysis phrases that best fit the citing case within their editorial guidelines, helping you make a "good law/bad law" determination.

What is a *Shepard's*® phrase level indicator?





These indicators show you that *Shepard's*® treatment exists for this item, without providing the specific *Shepard's* Signal™ indicators.

The colors of the level phrases indicate:

- Red - Warning
- Orange - Questioned
- Yellow - Caution
- Green - Positive
- Blue - Neutral
- Light Blue - No phrase exists

What is a *Shepard's*® depth of discussion indicator?

These indicators show you the various ways in which citing documents consider the cited reference. The number of bars shown indicates the relative differences between the categories.

Image	Indicator	The Citing Document...
	Analyzed	Fully considers the cited reference
	Discussed	Discusses the cited reference with some measure of analysis
	Mentioned	Mentions the cited reference but does so briefly
	Cited	Cites to the reference with minimal if any discussion

How do I Shepardize® a document when I know its citation?

1. In the search box, type `shep` followed by a colon(:), followed by the document citation. For example, enter `shep: 509 u.s. 579`. Or, you can click the **Shepard's®** link to the right of the **Search** button, and then enter the document citation.
2. Click the **Search** button.

How do I narrow or filter my results after a search?

If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the **Narrow by...** pane on the left side of your results.

- Use the **Search Within Results** filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: `dog bite liability` and your answer set is very large, you might enter the terms: `assumed risk` to narrow the results to only documents that also contain those terms.
- Use the other filters, such as **Content Type**, **Jurisdiction**, **Timeline**, **Sources**, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. The filters that are available for narrowing your results depend on what kind of search you ran and what types of content your results contain. For example, if you ran a legal search, the filters in the **Narrow by...** pane include **Cases**, **Statutes**, **Court**, **Jurisdiction**, etc. If you ran a *Shepard's®* search, the filters include **Jurisdiction**, **Analysis**, etc.


See the table below for more information about using filters.

Note:

- If you are viewing your results on the **Cases** content type tab, **Content Type** is not displayed in the **Narrow by...** pane because your results are already narrowed to the Cases content type and can't be narrowed any further. However, some content types, such as **Analytical Materials** can be further narrowed down, so the subcategories are displayed under **Content Type** when you are viewing your results from the Analytical Materials content type tab.
- Documents may appear in more than one category. For example, case law documents would appear in the "Cases" content type, in one of the jurisdictions, one of the sources, and would also contain a number of keywords and/or citations.

After running a search and reviewing your results:

If you want to...	Do this
Narrow your results to documents containing specific search terms or a citation	Enter your search terms or a citation in the box under Search Within Results and click OK .
Narrow your results by the other filters in the Narrow by... pane	Click the item under a filter heading (such as Content, Legal Topic, Jurisdiction, etc.) that you want to restrict your results to, and click OK . For example, to restrict your results to case law only, click Cases under Content.
Narrow by more than one category under a filter	Click Select multiple , select the check boxes for the categories you want to narrow your results to, and click OK .
Restrict your results to a particular date range	Under the Timeline filter of the Narrow by... pane, use your mouse to move either of the sliders to the left or right until the date range you want is displayed, or enter the dates in the the year fields, and click OK .

Return to a previous results set	Click the Close icon () next to your selections at the top of the Narrow by... pane to close that version of your results.
Return to your original results after narrowing them one or more times	Click the Clear all link next to You've selected at the top of the Narrow by... pane.
Find your original or Search Within Results search terms in a document	Open a document from your results, and select the terms you want to find from the Navigate tool at the bottom right side of the document.

Note:-----
 Each time you narrow your results, the results are cumulative. For example, you can narrow your results to **Cases**, then to a specific time line within those cases, and then to a specific jurisdiction or court within those cases

How do I use the Search Within Results: feature in Shepard's® ?

Before You Begin:

You must first run a [Shepard's® search](#) before you can narrow your results.

On the **Citing Decisions** tab, you can narrow your results by entering search terms into the **Search within results** box.

Important:

Use this option **only in results of less than 10,000 citing documents**. If the number of citing document exceeds that limit, [use another filter option first](#) to reduce the number of results to fewer than 10,000.

Note:

These terms are treated as [terms and connectors](#) search terms.


Tip:

The **Search within results** filter only searches documents that are online.

1. On your *Shepard's®* **Citing Decisions** tab, scroll down to the **Search within results** box, if necessary.
2. Enter the search terms you want to use to narrow your results.
3. Click **OK**.

How do I restrict my results to a specific citation?

If your search retrieved results containing legal citations, you can restrict your results to only those documents that contain specific citations. To do this, follow the steps below.

1. Submit your search request and review your results.
2. In the **Citation** section of the **Narrow by** pane, select the citation you want to restrict your search to. To select more than one citation, click **Select Multiple**. To display additional citations, click **More**.
3. To return to your original results set, click the Close icon () next to the citations you selected, displayed at the top of the **Narrow by** pane.


Your results re-display with only documents pertaining to the citations you selected.

How do I restrict my results to a specific date range?

You can restrict your results to a particular date range from the results view.

1. Submit your search request and review your results.
2. In the **Timeline** section of the **Narrow your results** pane,
 - Use your mouse to move either of the sliders to the left or right until the date range you want is displayed.
 - Enter a beginning year and an ending year in the date boxes and click **OK**.


Your results re-display with only those documents that fall within the date range you selected.

To return to your original results set, click the Close icon () next to the list of dates displayed at the top of the **Narrow by...** panel.


How do I email *Shepard's*[®] reports?

You can email *Shepard's*[®] reports selected from your results list, or a report you are viewing, to yourself or others.

From your results list:

1. Select the check boxes for the *Shepard's* reports you want to email.
2. Click the email icon ()
3. Complete the email form and click **OK**. For detailed information about completing the form, see [Email *Shepard's*[®] Report Page](#).

From a report you're viewing:

1. Click the email icon ()
2. Complete the email form and click **OK**. For detailed information about completing the form, see [Email *Shepard's*[®] Report Page](#).



The *Shepard's* Signal[™] Indicators

The *Shepard's* Signal[™] indicators are integrated into case law documents and provide an immediate indication of the subsequent history and treatment of a particular case. When these codes are present, the LexisNexis[®] research service displays one of the following signals.

Note:

Not every case will have a *Shepard's* Signal indicators.

When a signal is generated from the Subsequent Appellate History, the system looks at the Subsequent Appellate History as a chain of interconnected events. Thus, the phrase generating the signal may be assigned to a decision in that chain that does not apply directly to your case, but may be several links in the chain away from your case.

Indicator	Description
	<p>Warning: Negative treatment is indicated</p> <p>The red <i>Shepard's</i> Signal indicators indicates that citing references in the <i>Shepard's</i>[®] Citations Service contain strong negative history or treatment of your case (for example, overruled by or reversed).</p>
	<p>Warning: Negative treatment is indicated for statute</p> <p>The red exclamation point <i>Shepard's</i> Signal indicators indicates that citing references in the <i>Shepard's</i> Citations Service contain <i>strong negative treatment of the section</i> (for example, the section may have been found to be unconstitutional or void).</p>
	<p>Questioned: Validity questioned by citing references</p> <p>The orange <i>Shepard's</i> Signal indicators indicates that the citing references in the <i>Shepard's</i> Citations Service contain treatment that questions the continuing validity or precedential value of your case because of intervening circumstances, including judicial or legislative overruling.</p>
	<p>Caution: Possible negative treatment indicated</p> <p>The yellow <i>Shepard's</i> Signal indicators indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that may have a significant negative impact on your case (for example, limited or criticized by).</p>
	<p>Positive treatment indicated</p> <p>The green <i>Shepard's</i> Signal indicators indicates that citing references in the <i>Shepard's</i> Citations Service contain history or treatment that has a positive impact on your case (for example, affirmed or followed by).</p>
	<p>Citing references with analysis available</p> <p>The blue "A" <i>Shepard's</i> Signal indicators indicates that citing references in the <i>Shepard's</i> Citations Service contain treatment of your case that is neither positive nor negative (for example, explained).</p>
	<p>Citation information available</p> <p>The blue "I" <i>Shepard's</i> Signal indicators indicates that citing references are available in the <i>Shepard's</i> Citations Service for your case, but the references do not have history or treatment analysis (for example, the references are law review citations).</p>

Shepard's® Results Appellate and Subsequent History

The Shepard's® Prior and Subsequent Appellate History sections are presented in an "outline" format, where indentations are used to identify the direct relationships between the listed cases.

- Example: -----

In the image below, item #3 falls under item #2, items #4, #116, #117, and #119 fall below item #3. Item #118 falls below #116, #118 below #117, and #10 & #11 fall below #119.

Printable; Page; + 1 • 13 of 13 +

Appellate History

1. Citation you Shepardized:
Cuno v. DaimlerChrysler, Inc.
154 F.Supp.2d 1194, 2001 U.S.Oist. LEXIS 112M

Subsequent

2. Affirmed in part and reversed in part by:
Cuno v. DaimlerChrysler, Inc.
383 F.3d 319, 2004 U.S.App. LEXIS 18550, 2004 Fed App. 231 (6th Cir.)

3. Amended by:
Cuno v. DaimlerChrysler, Inc.
386 F.3d 738, 2004 U.S.App. LEXIS 21821

4. Rehearing denied by:
Cuno v. DaimlerChrysler, Inc.
2005 U.S. App. LEXIS 1750

5. Writ of certiorari granted:
DaimlerChrysler Corp. v. Cuno
546 U.S. 1163, 126 S.Ct. 1295, 163 L.Ed.2d 933, 2005 U.S. LEXIS 5423, 74 U.S.L.W. 3199

6. Motion granted by:
DaimlerChrysler Corp. v. Cuno
546 U.S. 1163, 126 S.Ct. 1295, 163 L.Ed.2d 1147, 2006 U.S. LEXIS 1098, 74 U.S.L.W. 3467

7. Writ of certiorari granted:
Wilkins v. Cuno
545 U.S. 1165, 126 S.Ct. 36, 162 L.Ed.2d 933, 2005 U.S. LEXIS 5423, 74 U.S.L.W. 3199

8. Motion granted by:
Wilkins v. Cuno
546 U.S. 1163, 126 S.Ct. 1295, 163 L.Ed.2d 1147, 2006 U.S. LEXIS 1098, 74 U.S.L.W. 3467

9. Vacated by, Remanded by, In part:
DaimlerChrysler Corp. v. Cuno
547 U.S. 332, 126 S.Ct. 1854, 164 L.Ed.2d 589, 2006 U.S. LEXIS 3956, 74 U.S.L.W. 4233, 19 Fla. 1. Weeld (Fed.S 185

10. Retrial denied by:
DaimlerChrysler Corp. v. Cuno
548 U.S. 920, 126 S.Ct. 2961, 165 L.Ed.2d 979, 2006 U.S. LEXIS 5143, 74 U.S.L.W. 3722

11. Rehearing denied by:
Wilkins v. Cuno

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