

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 you to information you need—can be completed at Lexis Advance® in a couple of steps. Try them out. Get comfortable. They're so simple you'll memorize them quickly.





Need more assistance with Lexis Advance?

The [Lexis Advance Support](#) site can help.





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

Talk to a representative virtually 24/7.



Search

-  Search with “terms & connectors”
-  Search a specific source
-  Combine sources/search favorite sources
-  Search with segments and commands



Find in one step

-  Retrieve full-text documents by citation
-  Get and print by citation
-  Find a full-text case or popular law by name
-  Request a *Shepard's*® report




Browse by hierarchy

-  Browse or search a table of contents (TOC)
-  Browse statutes

Research legal topics

-  Research a specific legal topic (Browse Topics)
-  Use LexisNexis® headnotes to find documents

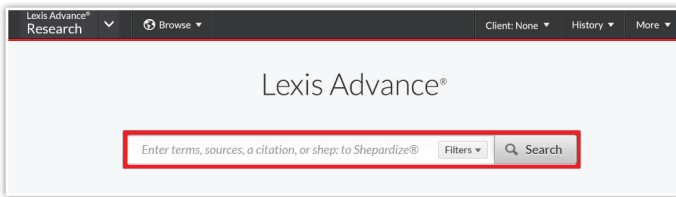
Using/delivering results

-  Refine your search results
-  Copy cites and text for your work
-  Print, email, download and save to Folders

Search



Search with “terms & connectors”



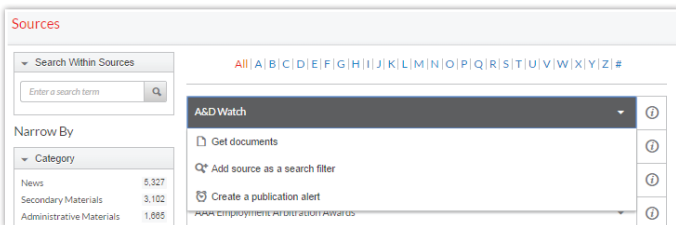
Just enter your words and connectors in the red search box, e.g., *same sex! W/10 marriage*, and select **Search**. Lexis Advance automatically interprets search commands such as ! and * to truncate words and W/n, OR, AND, etc. For help selecting connectors, select the **Filters** pull-down menu in the red search box and select **Advance Search**.

Please note: Lexis Advance ignores certain “noise words” 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 connector works in Lexis® Web.



Search a specific source



If you know the source: Enter a partial **title** in the red search box, which makes source suggestions. Select to add your title to a search. Select **Get Documents** to retrieve available source documents. Select **Table of Contents** to view a source’s TOC.

You can also browse and search sources:

1. Select **Browse** in the black Lexis Advance header and select **Sources**.
2. Select **All Sources**. The screen above displays.
3. Enter a partial title in the Sources search box. (Or browse titles alphabetically, by content types, jurisdictions, etc.)
4. Select a **title link**. Actions display. You can **Add to filters** 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 ⓘ icon.



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 a source**.
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. Once a Favorite, the item remains in your Recent & Favorites list and Favorites pod.

Favorites—can include sources, source combinations, legal topics and prefilters. The Favorites pod displays on the Lexis Advance home page for quick access.



Search with segments and commands

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!) AND bitcoin*

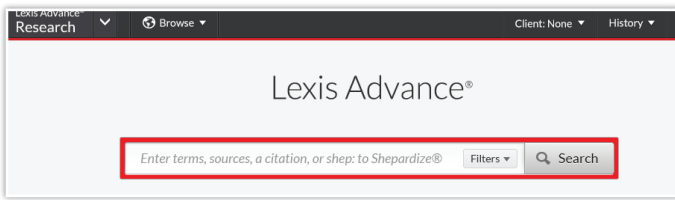
ATLEAST command

- *ATLEAST3(obama AND christie)*
Use a number with ATLEAST. Use OR or AND only.

Find in one step



Retrieve full-text documents by citation



Enter the **citation(s)** in the red search box and Select **Search**.

For example, ENTER:

- *29 cal 4th 262*
- *289 f3d 865*
- *2004 WL 6075307, 964 f supp 1416*
- *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*

You receive **two** results types:

1. The **full text** of the authority, which displays automatically. Select **Results List** on the full-text document or the **View References** link on the results list and move to ...
2. **Results that reference** your citation.

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:

- *800 f2d 113*
- *42 uscs @4577(c)*
- *orc ann 1701.591(d)*



Get and print by citation

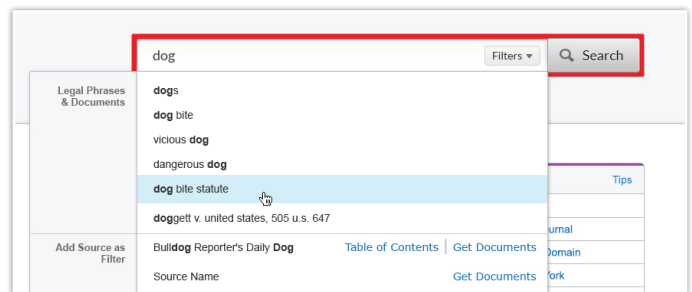
Retrieve and deliver—print, download or email—multiple documents or *Shepard's* reports in one batch from one screen.

Select the **Research** pull-down menu at the top left of the Lexis Advance home page. Select **LexisNexis® Get & Print**. Enter up to 10 citations. Follow screen instructions to choose document type and formatting, delivery method, etc.



Find a full-text case by name

The Lexis Advance red search box suggests the names and citations of **top-cited 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*.



Also find cases by searching with the NAME segment.

ENTER: *NAME (roe and wade)*



Request a *Shepard's*® report

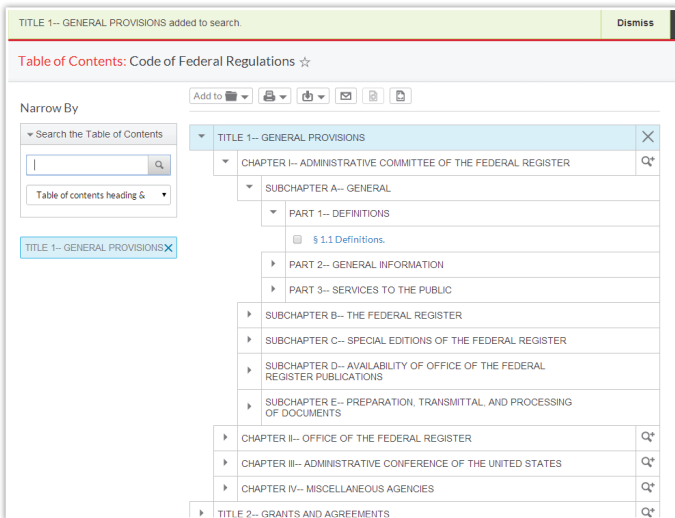
Enter *shep:* then the citation in the red search box, e.g., ENTER: *shep:800 f2d 111* then select **Search**.

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 research box and select the **Table of Contents** link.
2. Identify your TOC source in Browse Sources and select the **Table of Contents** link.
3. Select the source's **View Table of Contents** link in your search results.
4. Select the source's **View Table of Contents** link from your Recent & Favorites list or Favorites pod.

To browse a TOC:

Open and close hierarchy levels. Select ► to open, ▼ to close.

Select a **blue document link** to open a full-text section. The document opens in a new window. To return to the TOC, close the document.

To search a TOC:

Enter your **search terms** in the search box at the top of the open TOC, e.g., ENTER: *limited partnership* and select **Search**.

You can search:

- **Both the TOC and documents at once**, or the TOC or documents separately. Make your selection beneath the search box. (Default is both.)
- **Specific portions of the TOC**, e.g., several chapters. Select the **magnifying glass icon** next to the sections you wish to search. (You can also select sections then **print, deliver or share**.)

After you make your selections, select the gray **magnifying glass search button**.

Open relevant documents or browse surrounding levels.

To return to the TOC, select the **TOC title link** or select **Clear Search**.



Browse statutes

◀ Previous

17 CFR 240.10b-5

Copy citation

This section is current through the November 21, 2013 issue of the Federal Register

[Code of Federal Regulations](#) > [TITLE 17--](#) > [CHAPTER II--](#) > [PART 240--](#) > [SUBPART A--](#) > [MANIPULATIVE AND DECEPTIVE DEVICES AND CONTRIVANCES](#)

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Next ▶

§ 240.10b-5 Employment of manipulative and deceptive devices.

It shall be unlawful for any person, directly or indirectly, by the use of any means or instrumentality of interstate commerce, or of the mails or of any facility of any national securities exchange,

(a) To employ any device, scheme, or artifice to defraud,

(b) To make any untrue statement of a material fact or to omit to state a material fact necessary in order to make the statements made, in the light of the circumstances under which they were made, not misleading, or

(c) To engage in any act, practice, or course of business which operates or would operate as a fraud or deceit upon any person, in connection with the purchase or sale of any security.

Statutory Authority

(Sec. 10; 48 Stat. 891; 15 U.S.C. 78j)

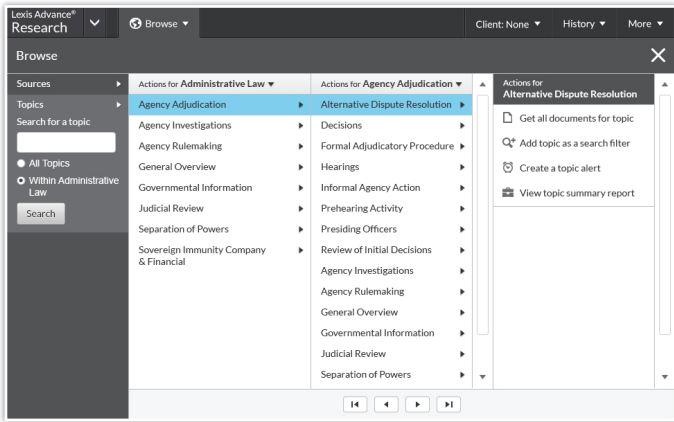
Move to preceding or succeeding sections. Select the **Next** or **Previous** arrows at the top or bottom of the screens. To move to a **TOC level**, you can select a level from the **hierarchical links** at the top of the document. Or select the **Table of Contents** link on the left side of the document.

Research legal topics



Research a specific legal topic
(Browse Topics)

Select **Browse** in the black Lexis Advance header, then select **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: *alternative dispute resolution*, and select **Search**.

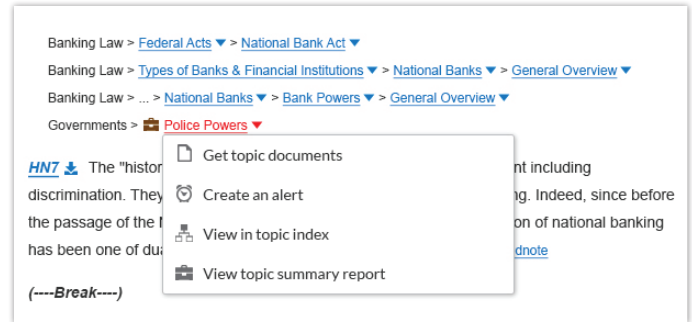
To browse for your topic:

1. Select an area of law, e.g., Agency Adjudication.
2. Select ► to open subtopics, ▼ to close.
3. Select a **topic link**. Select a task, e.g., **view topic documents** or set up a **topic alert** to notify you of changes in the topic documents. **Topic Summary Reports**, compiled by LexisNexis legal editors, point 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.



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. Select **Get topic documents**. Your results documents are sorted by relevance with the Cases tab displaying.
3. Refine. Add **filters**, e.g., select a jurisdiction. Or **Search within results**, i.e., add search words to describe your issue or fact pattern.

Topic Summary Reports, discussed below left, also point you to relevant authority in addition to topic definitions and secondary sources.

Using/delivering results



Refine your search results

Refine by content category

Review just cases or forms, etc. Select a **category link** (in blue) at the top of your left navigation pane.

Refine by adding search words

1. Go to the **Search within results** box in the left pane.
2. Enter your search terms, e.g., ENTER: *front pay*

To remove the additional search words, **select 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 jurisdiction to restrict your review to documents for that jurisdiction.

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

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

The screenshot shows the LexisNexis search interface. On the left, there is a navigation pane with categories: Snapshot, Cases, Statutes & Legislation, Administrative Codes & Regulations, Administrative Materials, Secondary Materials, and Forms. Below this is a 'Narrow by' section with a date range filter set to '20/04/1991 - 30/05/2012'. There is a search box labeled 'Search within results' and a 'Category' filter dropdown. Below the category filter is a table of 'Practice Areas & Topics' with counts: Copyright Law (2,234), Civil Procedure (1,456), Criminal Law & Procedure (890), Computer & Internet Law (56), Trademark Law (37), and Patent Law (26). At the bottom, there is a 'Timeline' section with a bar chart showing activity from 2010 to 2012, with a date range of '20/04/2010' to '30/05/2012'.

[Log in](#)

www.lexisadvance.com

[Learn more](#)

www.lexisnexis.com/advance



Copy cites and text for your work

Add citations: Including parallel cites and links to the full-text document. Just select the **Copy Citation** link at the top of the full-text document.

The screenshot shows a document snippet with a context menu open over a highlighted section. The menu options are: Copy, Add to folder, Add to search, Annotate, and Highlight. The highlighted text is: "employer may suppose a correlation between the two factors and act accordingly. Nor do we rule out the possibility of dual liability under ERISA and the ADEA where the decision to fire the employee was motivated both by the employee's age and by his pension status. Finally, we do not consider the special case where an employee is about to vest in pension benefits as a result of his age, rather than years of service, see 1 Mamorsky, supra, at § 5.02(2), and the employer fires the employee in order to prevent vesting. That case is not presented here. (interfere employ". The context menu is positioned over the text, and the 'Copy' option is selected.

Copy text and citation: Highlight the text you need. An option box displays. Select **Copy**. For citation and copy attribution, you can select from a variety of style formats. You can also choose to include parallel cites and a link to the document.



Print, email, download and save to Folders

Deliver a **single document** as you view the full text of that document. Deliver **one or more documents** from the results list—even across content categories. **Select the checkbox** next to each document you wish to deliver.

Then look for the delivery icons at the top of the screen:

Print: Options let you format (fonts, search terms in bold, etc.), show headnotes in cases, etc. Save steps and bypass options screens too. Just select **Use default settings**.

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

Download: Options let you download as .Docx, .WP or .PDF, send to CaseMap® or download the results list. Even send as multiple, zipped files. Save steps and bypass options screens too. Just select **Use default settings**.

Save to a Folder: Options help you select a folder, save the document(s) or results list(s) and add notes to preface the document(s).

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 www.lexisadvance.com. Lexis Advance screens adapt automatically.

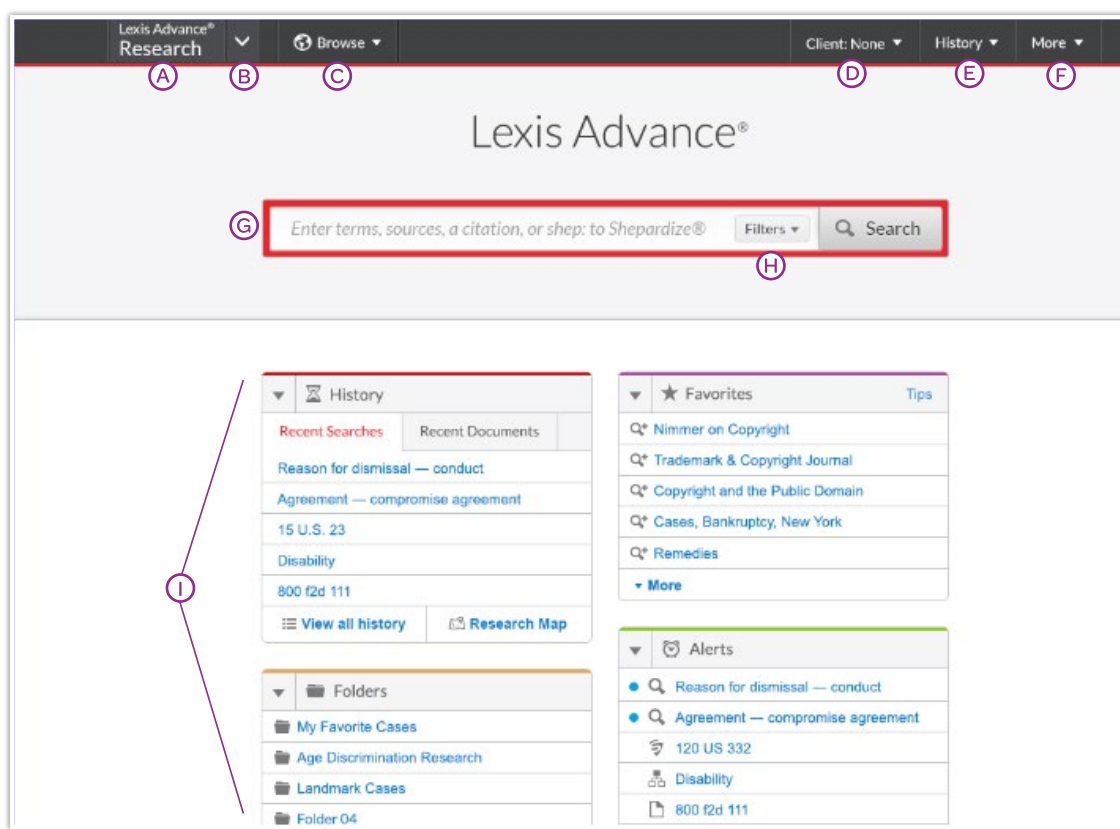
Download other Lexis Advance how-to literature, videos, tips and more!

[The Lexis Advance Support Site](#) can help you with log-in issues and update you on new Lexis Advance enhancements.

Start your search: red search box	2
Filter: refine your search and save browsing time	3
Browse Sources: find specific sources to search	4
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Snapshot view: view the most relevant results on one screen	7
Folders: save documents, select text, searches, etc.	8
Cases: get more than full text	9
Shepard's® Citations Service	10
Shepard's® Graphical: map the appellate history	11
Shepard's® Graphical: spot trends in citing references	12
History: view searches and much more in the list view	13
History: use the map to expand your research	14
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Please note: All screens shown may change slightly as new sources, features and enhancements are added.

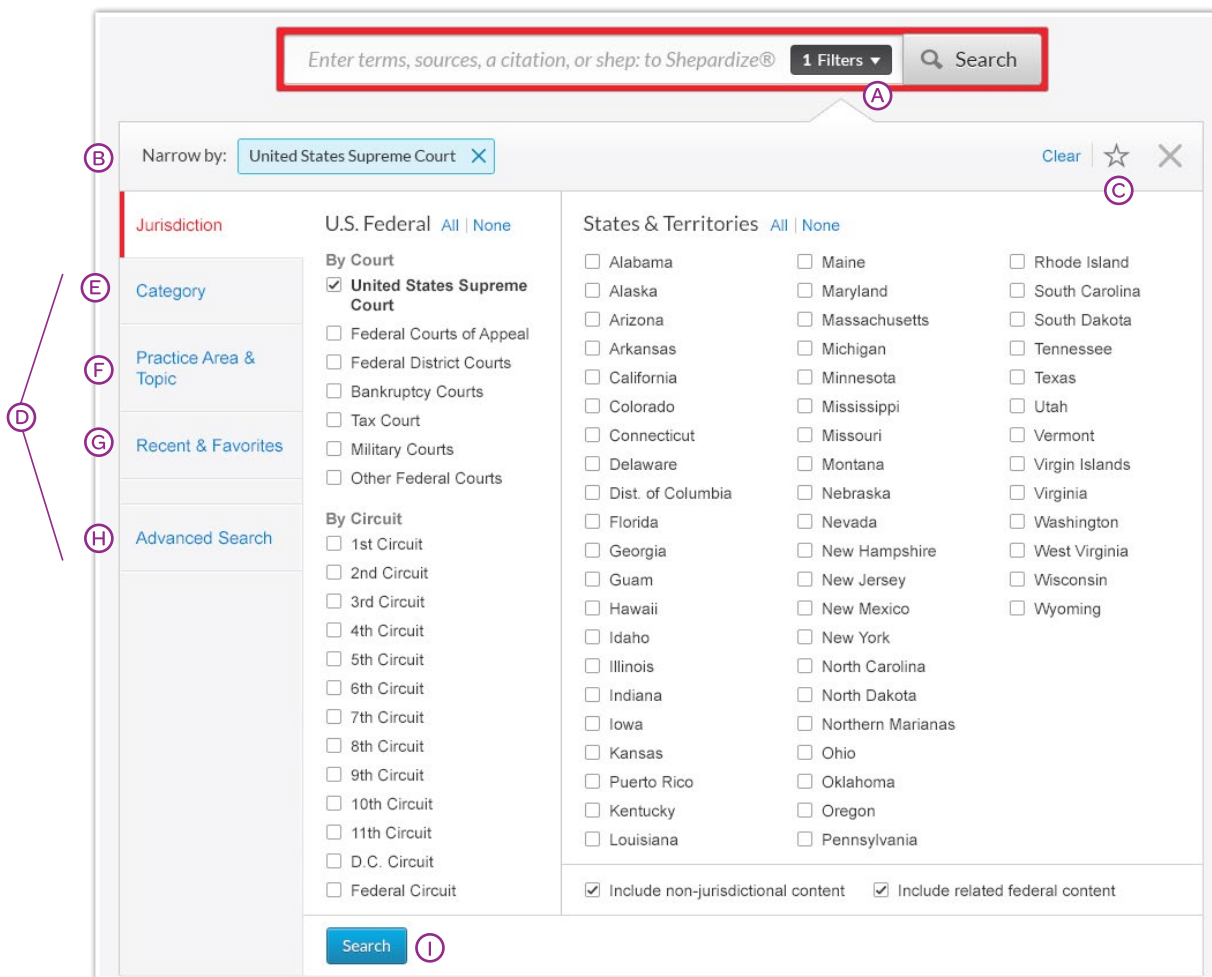
START YOUR SEARCH: RED SEARCH BOX (HOME)



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

- (A) **Return to this home page.** Click the **Lexis Advance logo** 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 or legal topics.** Click **Browse**. Select **Sources** or **Legal Topics**. Drill through the hierarchy or search for specific sources or topics.
- (D) **Change/edit client** matter IDs.
- (E) **Return to recent searches** or documents retrieved. Also connect via the History pod below the red search box.
- (F) **Link to Settings**, Help, Price Guide, *My Lexis™*, Sign Out, etc. Also gain access to Folders, Alerts and Notifications. Or use the landing page pods shown on this page.
- (G) **Enter your search words, find sources and more!**
Enter a:
 - **natural language search** and click **Search**. No source selection necessary.
 - **terms and connector search**, e.g., *americans disabilities /20 alcohol!* and click **Search**
 - **citation**, e.g., *800 f2d 111* and click **Search** to retrieve the full-text document as well as search results for that citation
- **partial or full source title**, e.g., *Collier*, to find a source title to add to your search. Or retrieve the source's documents.
- **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**
As you type, the red search box offers suggested legal phrases, documents or sources.
- (H) **Refine your search upfront and filter** by content, jurisdiction or practice area—or get help with terms & connectors. **Click filters to re-use recent sources, filters or topics.** You can also filter your **search results**.
- (I) **Get there quicker!** Get fast access to favorite sources, Folders, Alerts and legal topic update notifications (A blue dot means that item has new information). Also get access to **Help topics**.

FILTER: REFINE YOUR SEARCH AND SAVE BROWSING TIME

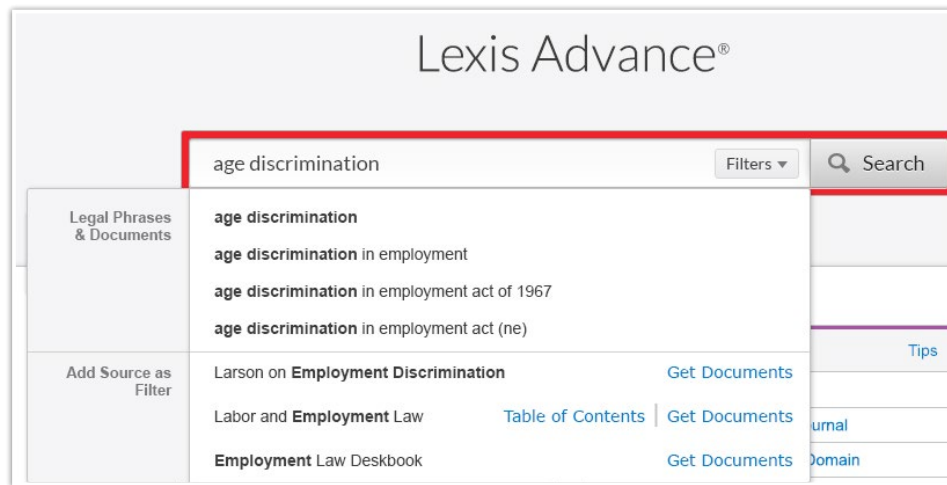


You can filter your [search results](#) to limit the number of documents. But you can also save **time up front and filter before you search**, choosing jurisdictions, content categories and/or practice areas. Add **favorite sources, source combinations, recently used filter combinations or frequently used legal topics** to your search. Finally you can get assistance developing a **terms & connectors** search.

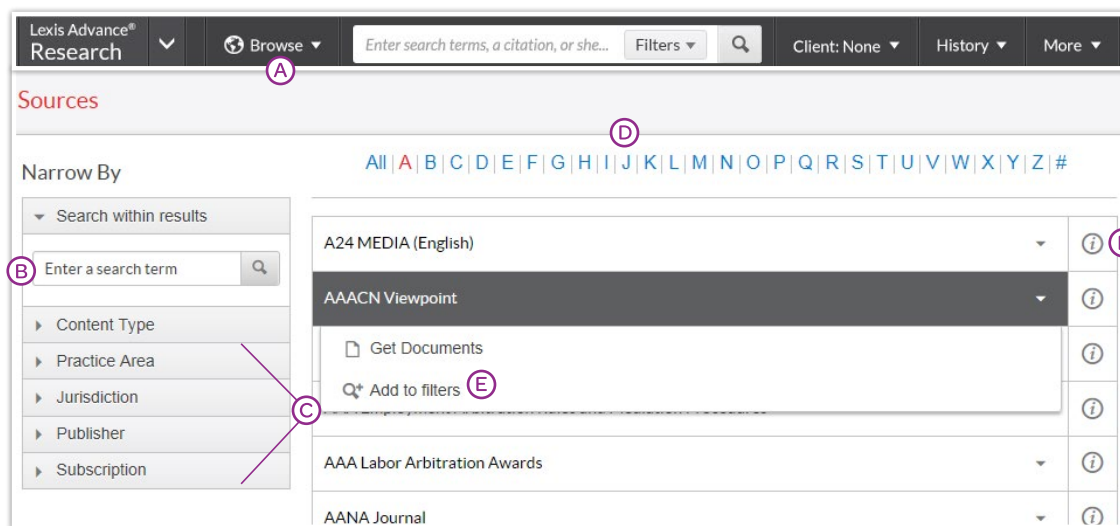
- A** Click the **Filters** pull-down menu to add filters. As you add, the filters box displays the number of filters you've selected.
- B** As you add filters across screens, the **Narrow by** box displays your filter choices. Click the **X** to delete a choice or **Clear** to remove all choices.
- C** Finished selecting filters? You can **save the combination** as a favorite and re-use. Click the **star** to add it to your **Favorites** list.
- D** **Navigate filter choices.** Just select a Filter link.
- E** **Category** options include all content types available, e.g., select to search only legislative sources and cases. Also choose what category to display first.
- F** **Practice Area & Topic** options include more than 40 practice areas.
- G** **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](#).
- H** **Advanced Search** helps you select search commands. Also link to **citation formats** for retrieving full-text documents.
- I** Click **Search** to close the Filter box when you've finished selecting filters.

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 two ways.

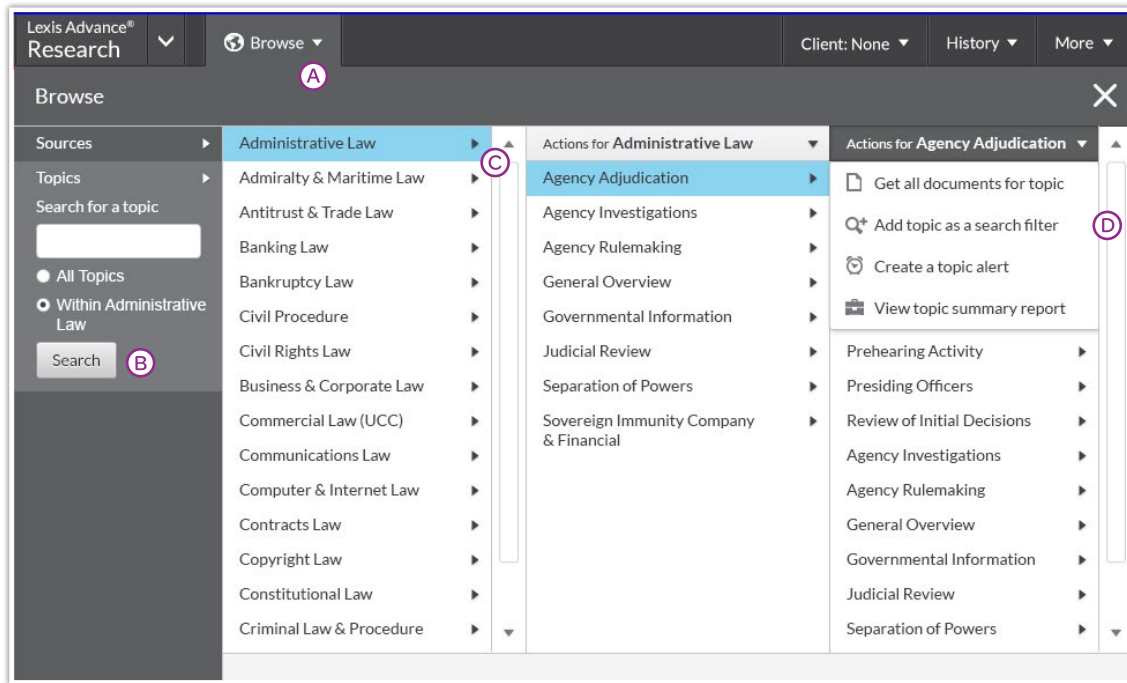


1. If you know the source name or partial name, enter it in the red search box.
 - Select a source title to add it to your search.
 - Select a source's **Table of Contents (TOC)** link to browse the TOC, search the full TOC or **select specific parts of the TOC** to search and/or deliver.
 - Select a source's **Get Documents** link to retrieve all available documents for that source. Then you can set a **Publication Alert** to get source updates.



2. You can also search or browse source listings:
 - (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
 - (F) **Click the information** (i) icon to display the source description with details on content, coverage and update schedule.

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 **Search**.
- C** Or browse levels of the legal topic hierarchy. Click a **Practice Area** link. Select a topic or use the arrows to open or close additional levels.
- D** Use your topic in your research! Once you choose a topic, you can:
 - View Lexis Advance search results on this topic, i.e., relevant cases, legislation, news, dockets, etc.
 - Add it 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.

Legal topics added to your search will be saved in your **Recent & Favorites** list. To make it a Favorite—and add it to your Favorites pod—click the star next to the topic in the Recent & Favorites list.

SEARCH RESULTS: FIND MOST RELEVANT DOCUMENTS FAST

The screenshot shows the Lexis Advance Research interface for a search on 'age discrimination'. The search results are displayed in a list format, with three results visible. The interface includes a search bar at the top, a navigation menu on the left, and a main content area with search results. Callouts A through J point to various features: A (Alarm clock icon for alerts), B (Actions menu), C (Snapshot button), D (Add to Folder icon), E (Print, download, or email icons), F (Sort by dropdown menu), G (Glasses icon for viewed documents), H (Discrimination text in the first result), I (History button), and J (Search within results box).

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 **alarm clock** icon next to your search. Your options screens let you choose content types, **edit search terms** and even **select the delivery time** of your updates.
 - B** Select **Actions** to add a search to a Folder or expand your search.
 - C** **See the top relevant results** for each content category. Click **Snapshot**.
 - 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 document titles you need, then click the appropriate icon. Click **More** to create a printable page of your results.
 - F** **Sort documents**. Default is by relevance. Use this pull-down box to re-sort by date and/or jurisdiction, etc.
 - G** **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.
 - H** **Determine relevance**. See your search terms in context to help determine which documents are on point.
 - I** **Return to prior research tasks**. Click **History** and select a prior search or document.
 - J** **Refine your search—no charge!** 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/law firm, judge, etc. Each content 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 in blue under Narrow by**. Remove the filter; just click the **X** in the blue box. Select and remove multiple filters.
- 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.

SNAPSHOT VIEW: VIEW THE MOST RELEVANT RESULTS ON ONE SCREEN

The screenshot shows the Lexis Advance Research interface. At the top, the search term 'age discrimination' is entered in the search bar. Below the search bar, the results are displayed in a 'Snapshot' view. On the left, a navigation menu is visible with categories like 'Cases', 'Statutes & Legislation', etc. The main content area shows three case results under the 'Cases' heading. Each result includes a checkbox, a relevance indicator (triangle, circle, or dot), the case name, a brief summary, and metadata like jurisdiction, court, and date. A 'View All Cases' link is at the bottom of the cases section. Below the cases, there is a 'Statutes and Legislation' section with one result, '29 USCS § 623'. At the bottom right, there is a 'View More Categories' button.

Save time by browsing the most relevant documents retrieved by your search—in 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 or save multiple documents to Folders.

- 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 **print**, **email** or **download** icons or the **Folder** icon. **And save even more time as you deliver.** Quick delivery options let you **bypass dialog boxes**. Download delivery plug-ins for **Google™ Chrome™** and **Apple® Safari®**.
- C** Click a document link to move to the full-text document.
- D** Click **View More Categories** at the bottom of the Snapshot screen to expand the Snapshot view.

FOLDERS: SAVE DOCUMENTS, SELECT TEXT, SEARCHES, ETC.

Gain access from the **Folder** 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 and Research Maps from History, Web links, Topic Summary Reports, PDFs, etc., as well as documents from other LexisNexis® products like LexisNexis® Verdict & Settlement Analyzer. **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 Folder 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.
- C** **Find vital facts across all Folders** and notes. Just enter your search words, e.g., *front pay*.
- D** **Use Folder listings/documents.** Check the **box(es)** next to the listing(s). Select a **delivery icon**, e.g., print. Select the **More** pull-down menu and **copy** the listing, **move** it to another folder, **remove** it from the folder, **manage sharing** options (if part of your subscription), etc.
- 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 in My Folders, 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** **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. Also **View All Notes** for the Folder.
- I** **Ensure documents are good law.** See immediately when a document was checked via *Shepard's*. Update if needed.
- J** **Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them.
- K** **Manage shared Folders and items** and view items shared with you by colleagues.

CASES: GET MORE THAN FULL TEXT

The screenshot displays the Lexis Advance Research interface for the case *Peatros v. Bank of America*, 22 Cal. 4th 147. The interface includes a search bar at the top with the query 'age discrimination' and 2 filters. Below the search bar, the document title and citation are shown. A toolbar (A) offers options to 'Add to', 'Print', 'Share', and 'More'. Navigation controls (B) include 'Jump to', 'Results List', 'Previous Document', and 'Next Document'. The main content area shows the case citation (D), court information, and a list of reporters (F). A context menu (L) is open over a highlighted passage, showing options like 'Copy', 'Add to folder', 'Add to search', 'Annotate', and 'Highlight'. On the right, the 'Shepard's' report (E) shows the case's status, and the 'About this document' section (H) includes links to the 'Original Source Image', 'Related Documents', 'Topic Summaries', and 'Legal Issue Trail' (J).

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 Tail™ and Topic Summary reports.

- (A) **Save the document** to a Folder, print, deliver or share. Click **More** to request a printer-friendly version.
- (B) **Jump to** specific document parts, e.g., opinion or headnotes. Move among **search terms** or **reporter pages**.
- (C) **Move among results documents**. Click **Next Document** or **Previous Document**. Click **Results List** to move to your results set.
- (D) **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.
- (E) **Check the *Shepard's* status immediately!** See possible issues and move directly to the [Shepard's report](#).
- (F) **Change pagination**. Select a reporter.
- (G) **Get more detail** on judges, attorneys, expert witnesses and companies mentioned. Click the underlined name. Get the option to **search across Lexis Advance** for more information, such as the entity's other cases.
- (H) **Open the original source PDF** and other available case documents.
- (I) **Come 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 **Topic Summary** Briefcase icons LexisNexis® headnotes. Click and link to Topic Summary Reports.
- (J) **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.
- (K) **Link to full-text documents cited**. Just click the link.
- (L) **Highlight—and use—vital text**. When you highlight text, an options box displays. You can copy the text and paste it to your work; annotate and/or save the text to a Folder; search with the selected text; or highlight important passages. Then save the highlighted document to a Folder.

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**
- Other Citing Sources such as treatises, or
- 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, delivery 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 as well.

H Filter citing references to get to vital cases faster. Refine by specific treatment, 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. 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*[™]. The **Depth of Treatment** 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 citing cases' 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.

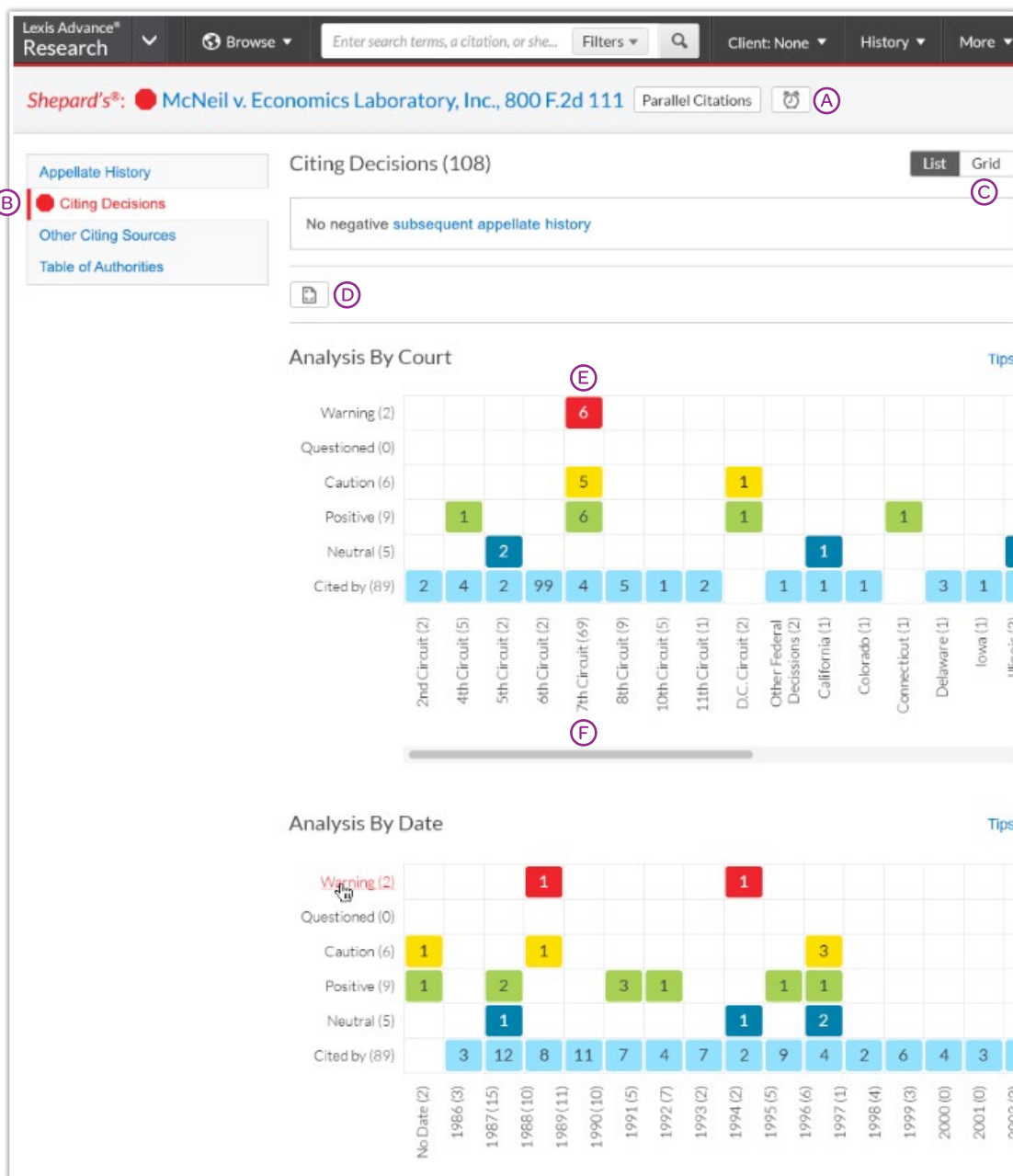
SHEPARD'S® GRAPHICAL: MAP THE APPELLATE HISTORY

The screenshot shows the Lexis Advance Research interface. At the top, there's a search bar with 'age discrimination' and a search icon. Below that, the case name 'Priebe v. Nelson, 39 Cal. 4th 1112' is displayed. The main area is titled 'Appellate History (6)' and has two tabs: 'List' and 'Map'. A message states 'No subsequent appellate history. Prior history available.' Below this, there are navigation icons for 'Print', 'Legend', and 'Display Options'. A graphical map shows the case's path through the 'STATE HIGH COURT' and 'STATE INTERMEDIATE COURT OF APPEALS' from 2004 to 2006. A pop-up window titled 'Appeal after remanded at:' shows citation information and actions like 'Open Document' and 'Show in List'. Various icons and labels are circled with letters A through G.

Get a better understanding of your case's "life cycle" as it travelled 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 star labels the citation you *Shepardized*.
- E** Remove map notations, e.g., indirect history and re-display 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**.
 - (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 (69)**, to view those cases in the List view.
- Understand grid components.** Click **Legend** at the bottom of the screen. (Not shown)

HISTORY: VIEW SEARCHES AND MUCH MORE IN THE LIST VIEW

The screenshot shows the Lexis Advance Research History page. At the top, there is a navigation bar with 'Lexis Advance Research', a search bar, and buttons for 'Browse', 'Filters', 'Client: None', 'History', and 'More'. The 'History' button is circled in red and labeled 'A'. Below the navigation bar, the page title is 'History'. On the left, there is a 'Narrow by' section with three filters: 'Search within history', 'Date', and 'Type'. The 'Date' filter is expanded, showing a list of dates from 'Today' to '12/09/2013' with corresponding counts. The 'Type' filter is also expanded, showing 'Legal Search' (114) and 'Document View' (94). The 'Client' filter is set to '-None-' (208). The main content area is titled 'List (208)' and has a 'List' button and a 'Research Map' button. The 'List' button is circled in red and labeled 'C'. Below the title, there is a search bar and a 'Sort by' dropdown menu set to 'Date Saved (Newest)'. The search bar is circled in red and labeled 'D'. The 'Sort by' dropdown is circled in red and labeled 'E'. The list contains three items: 1. 'age discrimination and front pay' (circled in red and labeled 'H'), 2. 'Cal Civ Code § 3342', and 3. 'Outer Continental Shelf Lands Act'. Each item has associated metadata such as filters, search type, and date & time. The 'Legal Phrase Equivalents Excluded' filter for the first item is circled in red and labeled 'G'.

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** (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.
- 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.** Click the search title.

HISTORY: USE THE MAP TO EXPAND YOUR RESEARCH

The screenshot shows the Lexis Advance Research History interface. At the top, there's a search bar and navigation tabs. The main area is titled 'History' and 'Research Map'. A sidebar on the left allows filtering by date, client, and trails. The central map shows a network of search trails. A central panel for 'Cases 1298 Results' provides actions like 'Rerun search', 'Select search to compare search results', and 'Save search to folder'. Buttons for 'Add to', 'More', 'Compare Search Results', and 'Find Similar Documents' are visible. A 'Reset map to default state' button is also present.

- A** Get a step-by-step graphical depiction of your prior research. Click **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 printer-friendly view and print. Click **More** for options.
- 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 view** to clear filters.
- H** Re-run or save your work. Click a map icon and choose to **re-run** your search or **save a search to a Folder**.

DOCUMENT COSTS

Documents outside your subscription are clearly marked and **cannot be accessed unless you take active steps** to purchase them. Many out-of-subscription sources can be added to your searches without extra cost. There are no search charges or hourly charges in Lexis Advance subscriptions.

Screens shown here are examples; they do not reflect current Lexis Advance prices.

Selecting out-of-subscription sources

From **Browse Sources** screens:

AAA Employment Arbitration Rules and Mediation Procedures	▼	ⓘ
AAA Labor Arbitration Awards*	▼	ⓘ
AAACN Viewpoint	▼	ⓘ
AAAI Journal**	▼	ⓘ

Select a source with one asterisk: Search this source at no charge, but you will incur document-access charges if you select documents from the results screen. Sources with two asterisks (and a grayed-out source name) cannot be added to your search.

Out-of-plan documents in search results

All out-of-subscription documents are marked. Plus you can see the cost and your search words in context to help you make a purchase decision. Documents available at a special price include a **Save!** icon. (Not shown.)

<input type="checkbox"/> 2. A Cambridge Univ. Press v. Becker, 863 F. Supp. 2d 1190	
Injunction granted at. Costs and fees proceeding at Cambridge Univ. Press v. Becker, 2012 U.S. Dist. LEXIS 123154 (N.D. Ga., Aug. 10, 2012)	Jurisdiction US Federal
	Court Supreme Court
<input type="checkbox"/> Get it now! for \$96	Date Mar 27, 1991

You can only access the document via the **Get it now!** link. (The document title is not linked.) You can also save the document to a **Folder** and purchase it later. There is no charge to hold an out-of-plan document in a Folder. Click the checkbox then the Folder icon and make your Folder selection.

Linking to out-of-plan documents

If you click an embedded link, i.e., attempt to link from a full-text subscription document to an out-of-plan document, you are notified and can cancel the task, or save or purchase the document:

Additional Charges Will Apply
This material is not included in your flat-rate plan for this ID.

List price: \$120	<input style="background-color: #4CAF50; color: white; padding: 2px 5px; border: none; border-radius: 3px;" type="button" value="Save!"/>
Your Price: \$96	

Client ID: -None-

Reminders on documents you purchase

Once purchased, non-subscription documents can be used for 90 days—or for one year if the document is saved to a Folder. **Lexis Advance shows you the expiration date on the:**

- **full-text document** in the “About this document” box
- **search results** listings showing that document
- **History** lists displaying that document
- **Folder** listings for that document. Updates to that Folder document during the year you use the document are included in the purchase price.

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www.lexisnexis.com/advancesupport

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



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Using search commands and connectors at Lexis Advance®

Lexis Advance® lets you use advanced search commands.

If you're comfortable using search commands and connectors—! **and** * to truncate words and **W/n, OR, AND**, etc., to connect search words and phrases—you can use these special commands to develop Lexis Advance searches. Here's what you need to know:

Lexis Advance® automatically interprets search commands

Just enter your words and commands in the Lexis Advance red search box, e.g., ENTER: *drone and commercial W/10 deliver!*. **Commands are not case-sensitive**, i.e., enter AND, And or and.

Broaden W/n connectors

While a Lexis Advance search ignores certain “noise words” added to your search, it **counts all words** in results documents **for the purpose of determining proximity**. So broaden your W/n connector. In other words, consider W/10 instead of W/5. For W/p and W/s, consider W/50 or W/15 respectively.

Search Lexis® Web separately

Only the AND connector works. The other commands do not operate in Web documents.

Let the red search box help you!

Click the filters pull-down menu in the red search box and select Advance Search. Choose search connectors and decide whether to include or exclude search words. Make your selections and add them to your search.

When more than one connector is used ...

Lexis Advance acts on the connectors in this order:

- OR
- Proximity connectors (W/n, /p, near/n, etc.): from left to right
- AND
- AND NOT, NOT W/n

For example, you ENTER: *bankrupt! /25 discharg! AND student OR college OR education! /5 loan*.

First, Lexis Advance creates a unit of *student OR college OR education!*. Next *bankrupt! /25 discharg!* is joined, and Lexis Advance ties *loan* to the unit of *student OR college OR education!*. Finally AND operates last, joining the created two units. Thus: *(bankrupt! /25 discharg!) AND ((student OR college OR education!) /5 loan)*.

Common legal phrases

The Lexis Advance service automatically recognizes many common legal phrases, e.g., *limited liability partnership, summary judgment, and search and seizure*. However, if you want to be sure any phrase you're searching is recognized, enclose it in quotation marks, i.e., ENTER: *"right to work."*

Here's an overview of Lexis Advance commands and connectors and how they work:

Command/ Connector	Overview
!	<p>Child! finds <i>child, children, childless, childish, etc.</i></p> <p>Used after word endings only. The word requires a minimum of three characters for the wildcard to be applied. Find the word root plus an unlimited number of additional characters.</p> <p>Note: Lexis Advance automatically finds common plural words, i.e., ending in s, es and ies.</p>
*	<p>When used as a suffix: Bank* is the same as Bank! The ! and * are equivalents. They will both replace 0 or more characters.</p> <p>Search results for <i>d*g</i> include <i>dog, Demming</i> and <i>digging</i>. <i>Do*g</i> will find <i>dog, doing</i> and <i>doug</i>.</p>
OR	<p>physician OR doctor</p> <p>Lexis Advance finds documents with either word or both words.</p>
AND	<p>bank*** AND deregulat!</p> <p>Lexis Advance finds documents with BOTH words only. Words can be ANYWHERE in the same document, not necessarily close in context.</p>
W/n or near/n	<p>disparate W/10 impact or disparate near/10 impact (Use a number with W/n or near/n)</p>
W/p or /p	<p>Converts to W/50</p>
W/s or /s	<p>Converts to W/15</p>
W/seg or /seg	<p>Converts to W/100</p>
AND NOT	<p>rico AND NOT puerto</p> <p>Lexis Advance finds documents with "rico." Documents with any mention of "puerto"—anywhere in the document—will not be retrieved.</p>
NOT W/n	<p>You must use a number with NOT W/n.</p>
NOT /n	<p>rico NOT W/2 puerto will find documents where "puerto" is mentioned, but not within two words of "rico." The NOT W/n connector is less restrictive than AND NOT; unless you're certain specific words must be totally excluded from your results, use NOT W/n instead of AND NOT.</p>
ATLEASTn	<p>You must use a number and search words in parentheses with ATLEASTn.</p> <p>ENTER: atleast5(obama AND putin AND oil) and a Lexis Advance search will find documents with at least five mentions of each search word. You can use the OR and AND connectors with ATLEASTn. You can use the OR, AND and proximity connectors like W/n with ATLEASTn.</p>

Get more tips for using Lexis Advance efficiently at the [Lexis Advance Support site](#).

Talk to a LexisNexis® Customer Support representative—live support virtually 24/7—at [800-543-6862](tel:800-543-6862).

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