



**I. Website & Support Options**

- i. LexisNexis Advance: [www.lexisnexis.com/lawschool](http://www.lexisnexis.com/lawschool)
- ii. Contact me (Lynn Pinnekamp) at: [lynn.pinnekamp@lexisnexis.com](mailto:lynn.pinnekamp@lexisnexis.com)
- iii. Contact the LexisNexis **Reference Attorneys** 24/7 at: **1-800-45-LEXIS**

**II. Lexis Advance in Review**

- i. **Review Lexis Advance layout**
  1. Folders (materials save indefinitely)
    - a. To **create a new folder**, click **“View All Folders”** and then on the left of the page, click **“Create Folder”**
    - b. Sharing: **Share folders** with students/faculty in your school. This is located using the **“Actions”** drop down menu within the folder
    - c. Remember: Anytime you would like to **save a document** to your folders, simply click the folder icon  located at the top of the document
- ii. **History:**
  1. Research history will save for 90 days
  2. Notice Research History is broken out by Searches, Documents and Shepard’s
- iii. **Alerts:**
  1. Stay current on your topic using Lexis Alerts!
  2. Conduct a search or pull a Shepard’s Report on a citation and simply click the bell icon  located that top of the page. This will launch a template that you fill out telling Lexis how often you would like us to re-run this search! If you set up an Alert on a Shepard’s Report, this will launch the template for you to fill out that will notify you every time something cites to your citation.
  3. Alerts that you ask to be delivered “online” will be located on the main Lexis Advance landing page.
- iv. **Review Search Box – One Search Retrieves it All**
  1. Enter terms, party names, citations, etc. in the red search box
  2. Pre vs. Post Search Filters (Note: I prefer post filtering after running the search)
  3. Narrow the search using the left menu options (post filter)
    - a. Note: Narrowing within a cite list is specific to that content area tab
  4. Cite list results are listed by relevance
  5. Save documents to folders using the folder icon at the top of each document
- v. **Search a Specific Source**
  1. Enter the source title in the red search box and select it from the word wheel below. This will allow you to search that one specific source. To clear the source and continue searching all of Lexis Advance, simply use the “Filters” drop down menu and click “Clear”.
  2. Note: you can even be somewhat general to see what sources populate when typing in a specific word (e.g., Tribal)
  3. Note: if you don’t find the source you were seeking, use the “Browse” drop down at the top of the Lexis Advance Research page.

vi. **Explore Content**

1. Simply another way to locate materials on Lexis Advance. This method allows you to select your source and drill down to conduct a search through specific database of materials

vii. **Foldered Content**

1. **Access** folders and content from the Lexis Advance Home Page
2. When within a document in your folder, highlight text with your mouse and when you lift off the mouse, select the option to **“Highlight”** or to **“Annotate”** to add notes to yourself.
3. **Multiple Colored Highlighting:** When highlighting take advantage of the various colors to help more quickly identify specific things within your document

viii. **TIP:** Change the cite list results **default content area** by:

1. Use the **More** drop down menu at the top right of the page and select **“Settings”**. From the left menu options select **“Lexis Advance Research”** and locate the drop down menu under the section titled **“Display search results in this category”** and select your default category.

<b>III. Creating the Perfect Search</b>
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- i. To return the best and most precise results, it is **ALWAYS best to use Terms & Connectors** search strategy. In essence, you are overriding the search algorithm taking place behind the scenes and telling the system exactly what you want

ii. **Terms & Connectors Specifics**

1. **TIP:** Use the **“Tips”** link to the right of the red search box if you need to refresh your memory on how to use Terms & Connectors
2. **Phrases:** To return documents containing a **phrase**, simply use **quotations** around the phrase (e.g., “internet access” )
3. **Root Extender: !** (e.g., bank! will return bank, banking, banked, banks, bankrupt, bankruptcy, etc)
4. **Connectors:**
  - a. **and:** mandates that terms and phrases be included in the returned docs
    - i. **E.g.,** car and accident and damages
    - ii. **Note:** You can type out the word and or use the & symbol
  - b. **or:** helps return results when there are multiple ways of stating the same thing
    - i. **E.g.,** car or truck or vehicle or automobile and accident and damages
      1. **Note:** Only one of the variations is required to be in the returned result, but the result must also contain the words accident and damages
      2. **TIP:** I like to put parentheses around my “or” subsets. It’s a personal preference, but it helps me to visually see what I’m requesting. E.g., (car or truck or automobile or vehicle) and accident and damages
  - c. **/p:** use to connect words and phrases that you want within the same paragraph as one another
    - i. **E.g.,** (car or truck or automobile or vehicle) /p accident and damages

1. **Note:** This search will return one of the variations of the word car and that word must be in the same paragraph as the word accident and also, the word damages must be mentioned in the document somewhere
- d. **/s:** use to connect words and phrases that you want within the same sentence as one another
  - i. **E.g.,** (car or truck or automobile or vehicle) /s accident and damages
    1. **Note:** This search will return one of the variations of the word car and that word must be in the same sentence as the word accident and also, the word damages must be mentioned in the document somewhere
- e. **/#:** use to connect words and phrases that you want within a certain number of words of another
  - i. **E.g.,** (car or truck or automobile or vehicle) /3 accident and damages
    1. **Note:** This search will return one of the variations of the word car and that word must be no more than three words away from the word accident in the document and also, the word damages must be mentioned in the document somewhere as well
- f. **and not:** this will remove any entries that would have otherwise met your search criteria, but because the document also contained a word or phrase you did not want they are no longer in the cite list
  - i. **E.g.,** (car or truck or automobile or vehicle) /3 accident and damages and not atv or “all terrain vehicle”
    1. **TIP:** always include the and not connector as the last connector in the sequence as it will remove all words that follow the term *and not*
- g. **atleast:** requires the results on the cite list contain the word or phrase listed at least a certain number of times (that you determine)
  - i. E.g., **atleast6(weapon) and atleast9(“baseball bat”)**
    1. This tells the search to only show results with the word weapon mentioned at least 6 times or more and those results must also mention the phrase baseball bat at least 9 times or more
    2. **Note:** even though the phrase baseball bat is in parentheses, it still requires quotation marks

#### IV. Searching with Segments

- i. **Segment searching** is another great way to get directly to the content you are seeking. The idea behind it is that you **are directing the platform to search ONLY the portion** of the document **you list**, and nothing else
- ii. To use a segment, simply **type the segment name** and then **enter the necessary text in parentheses following** the segment
  1. E.g., **summary(“water resource management”)**
    - a. This search tells the system to only return results where the phrase “water resource management” is mentioned in the summary section of a






law review or summary of a case where it provides an overview / summary of the entire article. Just a quicker way to determine if that article would even be helpful to your research in that if it was mentioned in the summary, it's likely on point to your research

### iii. What Segments & When

1. Use the following segments when ...
  - a. **Summary** – when you want search only the summary of a law review article or the summary of a case for a word or phrase (Note, phrase must still be in quotes) (e.g., summary(“water resource management”))
  - b. **Name** – when looking to return a docket for a person/company
  - c. **Hlead** – when looking for general News or Legal News articles containing your word or phrase in the headline or lead paragraph of the article. E.g., hlead(crowdfunding) and “New Zealand”
    - i. **Note:** often times the same or very similar articles are published by different news publications. Use the “Group Duplicates” option to remove the articles that are highly similar
  - d. **Title** – this segment is great for a variety of different areas but the most useful is when seeking a word or phrase that is mentioned in the title to a law review article
  - e. **Judge** – great to use when seeking to find cases where a specific judge presided
  - f. **Writtenby** – useful when looking to find cases that were authored by a specific judge
  - g. **Company** – when looking for specific company profile information or legal news references
  - h. **Congress** – when seeking specific bill text, legislative history or congressional record information from a specific congress
- iv. **Note:** once you have entered your search using the segment, you will still need to **navigate to the correct content tab** (E.g., Secondary) to get to the necessary cite list. It will automatically default to whichever tab you have set for your default tab
- v. **Note:** You can combine your restricted segment searches with any other search terms in a string as well. (E.g., summary(ERISA) and “disability benefits”
  1. Note, this search would require that ERISA be mentioned in the summary section of a law review/journal article and that the phrase disability benefits show up in the document somewhere as well

## V. Using *Shepard's* for Research

- i. **How *Shepard's* Helps:**
  1. *Shepard's* will show if your case is good or bad law
  2. *Shepard's* provides the appellate history of the case
  3. *Shepard's* will provide a list of all documents that have ever cited to the *Shepardized* citation
  4. One can *Shepardize* almost any citation
- ii. *Shepardize* a citation by clicking on the *Shepard's* symbol, the “*Shepardize*” box, or by typing in the citation in the search box and clicking “*Shepard's*”
- iii. What do the ***Shepard's* symbols** mean? Use the “**Legend**” link on *Shepard's* or see the box below:

Indicator	Description
	<b>Warning: Negative treatment is indicated</b> The red <i>Shepard's</i> Signal 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).
	<b>Warning: Negative treatment is indicated for statute</b> The red exclamation point <i>Shepard's</i> Signal indicates that citing references in the <i>Shepard's</i> Citations Service contain strong negative treatment of the section (for example, the section may have been found to be unconstitutional or void).
	<b>Questioned: Validity questioned by citing references</b> The orange <i>Shepard's</i> Signal 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.
	<b>Caution: Possible negative treatment indicated</b> The yellow <i>Shepard's</i> Signal 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).
	<b>Positive treatment indicated</b> The green <i>Shepard's</i> Signal 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).

#### iv. Reading a *Shepard's* Report

1. Appellate History
2. Citing Decisions
3. Other Citing Sources
4. Table of Authorities

#### v. Where is the *Shepard's* Treatment Coming From?

1. The *Shepard's* symbol will appear on the tab with the most serious treatment. If something happened in the appellate history that overruled the citation you *Shepardized*, the *Shepard's* symbol would appear on the Appellate History tab. If there is a case that has overruled your case, the red stop sign would appear on the Citing Decisions tab

#### vi. Appellate History

1. Will display both the **prior and subsequent history** of a case
2. Review by using the **list or map view** (Note: map view provides a graphical depiction of how the case made its way through the court system)

#### vii. Citing Decisions

1. Cases are by default **listed by court** (USSC, 1<sup>st</sup> Circuit, 2<sup>nd</sup> Circuit, 3<sup>rd</sup> Circuit, etc)
2. Use the **"Sort By"** feature to arrange by date, depth of discussion, etc
3. Total **number of cases citing to your citation** will be **listed on the tab** itself
4. **Narrow** the citing decisions **using the left menu** navigation and filter to only those cases citing to your citation coming from a specific jurisdiction, providing a specific treatment, or even containing a certain word or phrase
5. View using the **map or grid view** (Note: grid view makes it easy to see exactly how a specific court or jurisdiction treated the case)
6. **Depth of Discussion**
  - a. Helps to identify how much a case is talking about the *Shepardized* citation
    - i. **4 Discussion Bars = analyzed**
    - ii. **3 Discussion Bars = discussed**
    - iii. **2 Discussion Bars = mentioned**
    - iv. **1 Discussion Bar = cited by**

7. Use the “**View Text of Headnotes**” link in the left menu navigation to help refresh your memory of what that headnote discussed
- viii. **Other Citing Sources**
1. This tab provides a listing of various other documents that have cited to the citation in question
  2. Narrow the results list using the left menu navigation
- ix. **Table of Authorities**
1. Lists out all the cases used by the court in the *Shepardized* citation

## VI. **Shepardize a Statute**

- i. To save yourself time when conducting research, always **locate the statute, rule, regulation, or constitutional** section in question. **Once you have identified this, Shepardize the citation** to quickly locate cases citing directly to it
- ii. If you are looking to **Shepardize a specific subsection** of a statute, simply *Shepardize* the entire statute, and then click the link at the top of the page titled “**Shepardize reports by specific court citation**”. This will show you only cases that have cited to your statute for that specific subsection
- iii. **Note:** If there is any pending legislation for the statute/rule/regulation a “**Pending Legislation**” icon will appear in the “Citing Decisions” tab. Click this link to see what is currently being considered

## VII. **Statute Research Tips**

- i. **Table of Contents**
  1. To access the Table of Contents for a group of statutes, simply enter the title you are seeking in the Lexis Advance search bar and the word wheel will populate with the name of the source. To the right click the “Table of Contents” link to drill down through the TOC
- ii. **50 State Survey**
  1. Locate the statutes and regulations on point to a specific topic by simply typing in the open search bar: **50 State Survey** and selecting the “**Table of Contents**” option to drill down to the specific topic area
- iii. **Case Notes**
  1. With a statute on the screen, use the “Jump to” drop down menu and navigate to the “Case Notes”. This will jump you to the important case annotations that interpret various portions of the statute.

## VIII. **Tools to Expand Your Research**

- i. **Topic Summaries**
  1. After finding a great case, expand your research by using the Topic Summary reports. Locate the Topic Summaries in the box to the right of the case.
  2. The **Topic Summaries** will vary depending upon the topics included in the case. Topic summaries **include** information such as:
    - a. Definitions
    - b. Elements
    - c. Burden of Proof
    - d. Standards of Review
    - e. Links to Seminal Cases
    - f. Links to Secondary Sources

ii. **Legal Issue Trail**

1. When viewing a case, expand your research by using the “**Legal Issues Trail**” feature located in the box to the right of the case, then click “**Activate Passages**”
2. Once boxes are created around the issues in the case, simply click in the box of the issue you would like to expand upon to locate (a) cases the **court cited for that issue** and (b) locate other **cases that have cited to the case at hand for this issue**

iii. **Shepardize – Narrow by this Headnote**

1. Allows you to identify cases citing to the case at hand for the specific issue mentioned in the headnote relevant to your issue.

<b>I. Locating International Materials</b>
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- i. To locate international materials, you will want to use Lexis.com (the classic platform).
- ii. Use the Lexis Advance Research drop down menu and select Lexis.com. This will launch the classic platform. On the bottom right of the page locate the “Find Law By Country or Region” and then select your country and what it is you would like to search. Conduct your search using Natural Language or Terms & Connectors.
- iii. Note: Lexis.com will be discontinued at the end of the year and you will be able to locate these sources on Lexis Advance.

<b>II. Agency Materials &amp; Regulations</b>
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- i. Conduct a search using keys words/phrases
- ii. Locate Administrative Codes & Regulations under this exact content area on the left of menu navigation
- iii. Locate Agency specific materials in the content area titled “Administrative Materials”