



## 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., Environmental)
  3. Note: if you do not find the source you were seeking, use the “Browse” drop down at the top of the Lexis Advance Research page.

vi. **Explore Content**

1. 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 (e.g., Environmental Law)

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 first”** 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(“endangered species act”)**
    - 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 the summary of a case for a word or phrase (Note, phrase must still be in quotes) (e.g., summary(“**endangered species act**”))
  - 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 equity
    - 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. **Dissent** – this segment allows for you to search just dissents for specific words/phrases (e.g., dissent(ERISA))
  - e. **Concur** – this segment allows for you to search just concurrences for specific words/phrases (e.g., concur(Indian))
  - f. **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
  - g. **Judge** – great to use when seeking to find cases where a specific judge presided
  - h. **Writtenby** – useful when looking to find cases that were authored by a specific judge
  - i. **Company** – when looking for specific company profile information or legal news references
  - j. **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 <i>strong negative treatment of the section</i> (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
- x. Reason for Shepard’s Signal
  - 1. Displays the citing passage that had the strongest influence on the *Shepard’s* Signal treatment

**Ledbetter v. Goodyear Tire & Rubber Co., 550 U.S. 618**

Copy Citation

Supreme Court of the United States

November 27, 2006, Argued ; May 29, 2007, Decided

No. 05-1074

Reporter  
 550 U.S. 618 \* | 127 S. Ct. 2162 \*\* | 167 L. Ed. 2d 982 \*\*\* | 2007 U.S. LEXIS 6295 \*\*\*\* | 75 U.S.L.W. 4359 | 100 Fair Empl. Prac. Cas. (BNA) 1025 | 89 Empl. Prac. Dec. (CCH) P42,827 | 20 Fla. L. Weekly Fed. S 295

LILLY M. LEDBETTER, Petitioner v. THE GOODYEAR TIRE & RUBBER COMPANY, INC.

Prior History: [\*\*\*\*] ON WRIT OF CERTIORARI TO THE UNITED STATES COURT OF APPEALS FOR THE ELEVENTH CIRCUIT. [Ledbetter v. Goodyear Tire & Rubber Co., Inc., 421 F.3d 1169, 2005 U.S. App. LEXIS 18026 \(11th Cir. Ala., 2005\)](#)

Disposition: The judgment of the Eleventh Circuit was affirmed.

Shepard's®

Reason for Shepard's Signal™? [View the top citing reference](#)

No subsequent appellate history. Prior history available.

Citing Decisions (824)

- Warning (83)
- Questioned (1)
- Caution (45)
- Positive (151)
- Neutral (39)
- Cited By (567)

Other Citing Sources (1661)

[Shepardize® this document](#)

About This Document

Document: Ledbetter v. Goodyear Tire & Rubber Co., 550 U.S. 618 | Actions

Reason for Shepard's Signal™

The following reference has been editorially selected as having the strongest influence on the overall Shepard's Signal™ indicator of this case.

Citing Decision: Warning (1 of 83) - Top passage ([View all 83](#))

Headnotes cited: [HN3](#)

Superseded by statute as stated in:

[Davis v. Bombardier Transp. Holdings \(USA\), Inc. 794 F.3d 266, 2015 U.S. App. LEXIS 12624, 16 Accom. Disabilities Dec. \(CCH\) P16-161, 31 Am. Disabilities Cas. \(BNA\) 1446](#)

In early 2009, Congress passed the Ledbetter Act to overrule the Supreme Court's decision in [Ledbetter v. Goodyear Tire & Rubber Co., 550 U.S. 618, 127 S. Ct. 2162, 167 L. Ed. 2d 982 \(2007\)](#). ... In passing the Ledbetter Act, Congress overruled the Court's narrow interpretation of when compensation-based claims accrue. See [Schwartz, 665 F.3d at 449](#). ... The Ledbetter Act's congressional findings section states: "The limitation imposed by the Court on the filing of discriminatory compensation claims ignores the reality of wage discrimination and is at odds with the robust application of the civil rights laws that Congress intended."

Disposition: The judgment of the Eleventh Circuit was affirmed.

Core Terms

discriminatory, charging, paycheck, salary, disparities, decisions, seniority, employees, sex, Rights, cases, days, discriminatory intent, discrete act, filing of charges, unlawful employment practice, employment practice, termination, effects, male, discriminatory act, discrete

Reason for Shepard's Signal™? [View the top citing reference](#)

No subsequent appellate history. Prior history available.

Citing Decisions (824)

- Warning (83)
- Questioned (1)
- Caution (45)
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About This Document

Related Content

[Find references to this case](#)

**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 (42 USC 4331)

- 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. Finding an Act on Lexis Advance (Codified Statutes)

1. Use the red search box and locate the **Popular Names Table** (this source will show up in the word wheel below the red search box after typing out the source name). Click on to the source title.
2. Use the plus signs to **drill down and locate the name of the act**
3. The **very first line will include blue links** and the first one will be a reference to the Public Law. In that same line, **locate the reference to the USCS** and that will be the first place the act has been codified. Notice the sections that follow are other areas the act has been codified in as well.

### ii. 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. If there is a table of contents associated with the source it will automatically populate.

### iii. 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 source title from the word wheel.

### iv. Case Notes

1. With a statute on the screen, use the "Go 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. **Topic Summaries** provide you with an overview on various topics. 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
2. You can often find Topic Summaries in the "About This Document" section to the right of the case when viewing on Lexis Advance.
3. However, you can also search through all **Topic Summaries** by entering the source title Topic Summaries into the red search box and selecting the source from the word wheel drop down menu. Next, search through this source by entering in your general topic (e.g., breach of contract)

## 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.

## I. Locating International Materials

- i. To locate international materials, use Explore Content. The “International” tab contains primary international materials.
- ii. To locate secondary international materials, click “Practice Area or Industry” and then select “International Law”.

## II. Agency Materials & Regulations

- i. Conduct a search using key 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**”

## III. Using Ravel, Context & Lex Machina

### i. Ravel

1. Quickly locate the 75 most influential cases on your cite list
2. Enter words/phrases into the red search box and run the search. Select the Cases category (if not already defaulted to the Cases cite list).
3. Next, locate the icon in the upper right corner that resembles a molecule. This is Ravel View. This feature will surface the top 75 most influential cases from your cite list.
4. Use the Filters option to narrow the list of 75 to just those cases from a specific jurisdiction, time frame, using additional words/phrases, etc.

### ii. Context

1. Looking to tailor a motion using the language a specific judge often uses? Easy! Simply open Context (using the product switcher in the upper left corner of the page). Select “Judge” and enter the name of judge you will be appearing before.
  - a. Click into the “Analytics” section to see the likelihood of a motion being granted or denied
  - b. Click the “Citation Patterns” option to see the cases the judge cites to most frequently and the language from those cases.

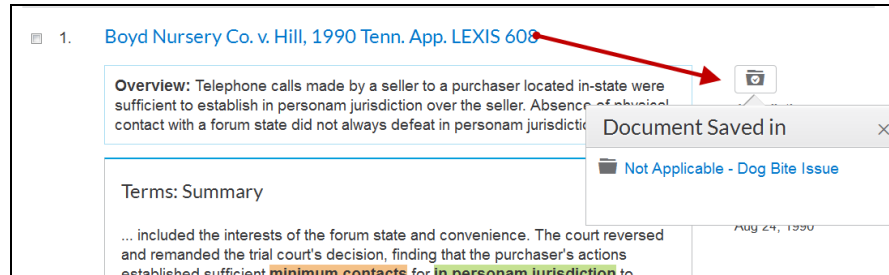
## IV. A Couple Tips I Learned Working in Firms

### i. Not Applicable Folder

1. Have you ever conducted a search and clicked into a document just to realize you’ve already read it and it wasn’t helpful the first time?!?!? Try this! Create a folder titled “Not Applicable – XYZ Research Project” and when you come across things that are not helpful, drop them into this folder. This way the next time you run a search, you’ll see the document has already been foldered and if you click on the folder it

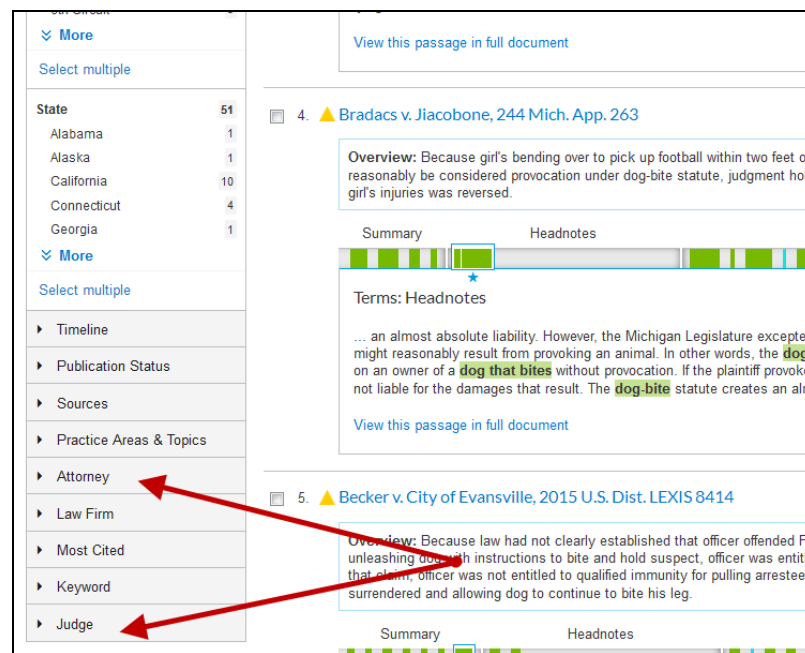


will tell you where! You just saved time from re-reading something that wasn't helpful to your project!



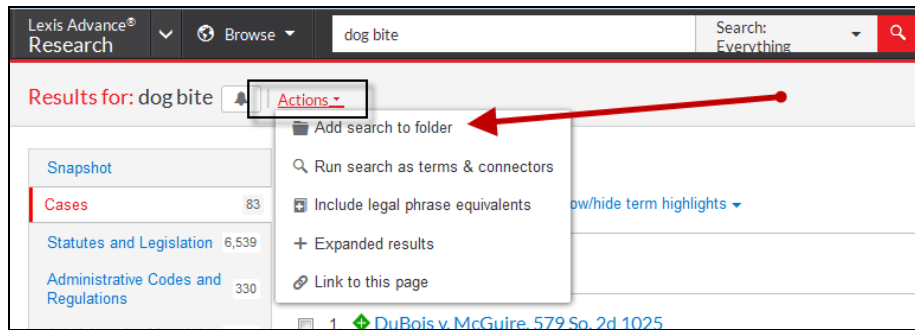
## ii. Case Law Filters

1. When conducting research for your supervising attorney, stand out! You can do this by writing the general memo/overview on point to the research project. But then take it a step further!
2. In the “Cases” content folder, use the filter titled Judge or Attorney and locate cases where the judge YOU will be presenting to has be involved in previous cases. Use this information to add a bonus paragraph at the end of the memo to give your supervising attorney a heads up as to how this judge typically rules on XYZ issue. The same is true for the “Attorney” filter. If you find cases where the attorney has presented on similar issues, include a paragraph on things they typically like to argue to help prepare your supervising attorney with what they can expect.



## iii. Saving a Search to a Folder with Filter

1. When you access your research history, only the initial search itself is saved, it does not include any filters you applied.
2. If you'd like to save the entire search, create a folder and save the search to your folder. This will save WITH the filters!
3. To save a search use the “Actions” drop down menu above the cite list results. Click “Add Search to Folder” from the drop down and this will save your filters as well as the search itself.



#### iv. Results List / View References

1. When entering a document by citation in the red search box, it will instantly display that document. But what if you wanted a list of cases, or secondary sources, etc that CITED TO your citation. What do you do?? Easy! Click the drop down area next to the section titled About This Document (located in the right margin of the page), then click Find references to this case.



#### v. Lexis Results – No Limits

1. When conducting a search on Lexis, this retrieves EVERY result relevant to your search. That said, you could conduct a very broad search (e.g., discrimination) and retrieve every document on our system mentioning that word. There are no limits. This is not the case with other service providers.
2. This is helpful to know because you can feel confident that when you conduct a broad search (such as the example above) you can then navigate to case law and filter by your jurisdiction and know that every case, no matter what state it's from, will be given to you because to Lexis ... everything is relevant.