Lexis Advance® India

User Guide

Log in:
www.advance.lexis.com/in

For more enquiry on Lexis Advance, please contact our Customer Support at 1800xxxxx or email at help.in@lexisnexis.com

For training request or technical support, please email to Customer Engagement at training.in@lexisnexis.com

LexisNexis®

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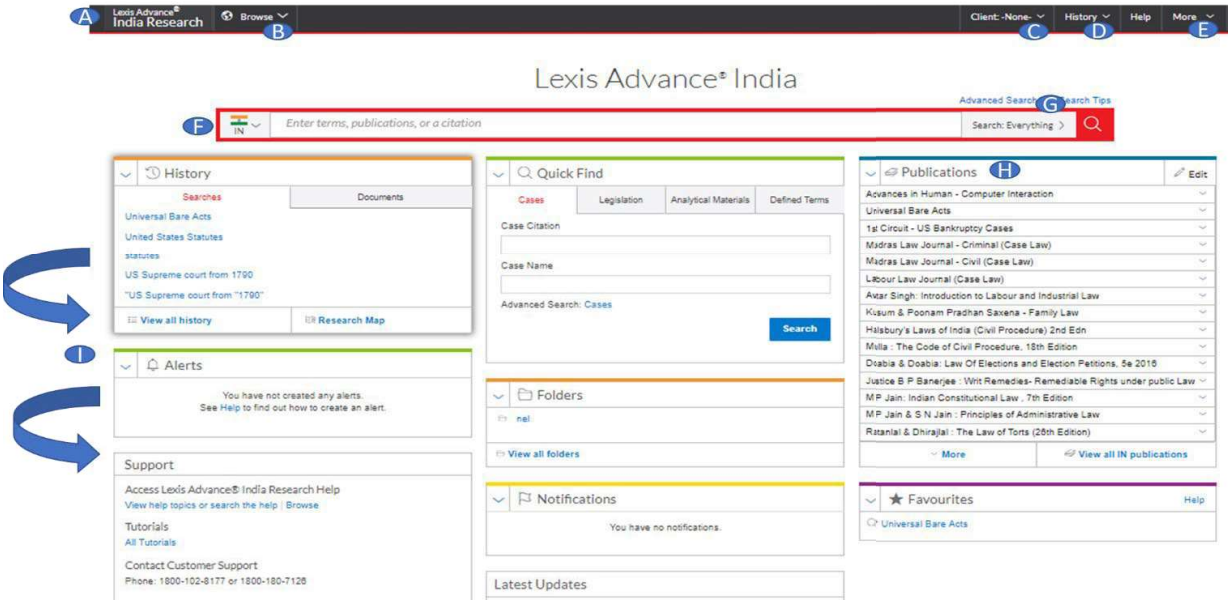
Start Your Search: Red Search Box (Home Page)

When you login to Lexis Advance India, the home page will display the following:



(A) Return to this home page. Click the Lexis Advance India Research logo on any screen.

(B) Browse publications, legal topics. Browse the available list or search for specific publications or topics.

(C) Set, change or edit client IDs - allowing you to create multiple matters IDs for respective research use case.

(D) Return to recent searches or documents retrieved. Also connect via the History pod below the red search box.

(E) Link to Settings, Feedback, Help, User Guides, Sign-in Profile, Sign Out from the More drop-down menu. Also find access to Folders, Alerts and Notifications, or alternatively use the landing page pods shown on this page below the red search box.

(F) Enter your search terms.

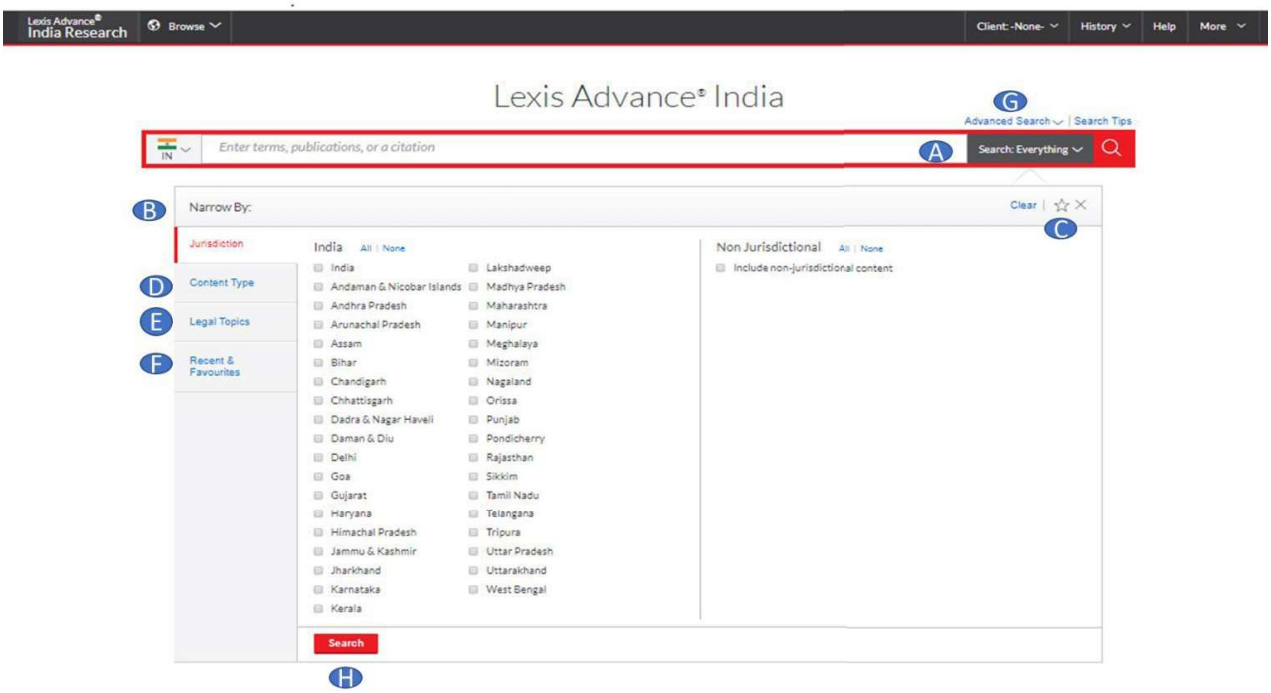
Either:

- natural language (free text) and click Search. No source selection necessary.
- terms and connectors search, eg, *Medical negligence w/s India*, and click Search.
- citation, eg, *LNIND 1967 SC 49*, and click Search to retrieve the full-text document as well as search results for that citation.
- partial or full publication title, eg, *Halsbury's Laws of India*, to find a publication title to add to your search. Or retrieve the publication's documents.
- case name, eg *kesavananda bharati*, and click Search to retrieve the full text case as well as search results for other references to that case.
- legislation title, eg *Companies Act 2013* and click Search to retrieve results for the Act at the top of the results list, as well as search results for annotated versions and other references. If you enter the legislation title plus section number, this will also be boosted to the top of the results list.
- As you type, the red search box offers suggested legal phrases, documents or publications.

(G) Search Tips get help with terms and connectors.

(H) Refine your search upfront and filter by content type, jurisdiction or legal topic. Click Favourites to re-use recent publications, filters or topics. You can also filter your search results from the results page.

Filter: Refine Your Search and Save Browsing Time



You can filter your search results to limit the number of documents that appear. You can also save time by filtering before you search by choosing jurisdictions, content types and or legal topics. Add favorite publications, combinations of publications recently used filter combinations or frequently used legal topics to you research. Finally, you can get assistance developing terms and connectors through search tips.

(A) Click the Search Everything pull- down menu to add filters. As you add, the Search Everything box will display the 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 favourite and re-use. Click the star to add it to your Favourites list.

(D) Navigate filter choices. Just select a Filter link.

(E) Content Type options include all content types available, eg, select t.oAlso choose which content category to display first.

(F) Legal Topics options include 17 top level legal topics.

(G) Recent & Favourites options include up to 50 recent and favourite publications / combinations of publications, recent and favourite filter combinations, and recent and favourite legal topics selected from Browse Topics.

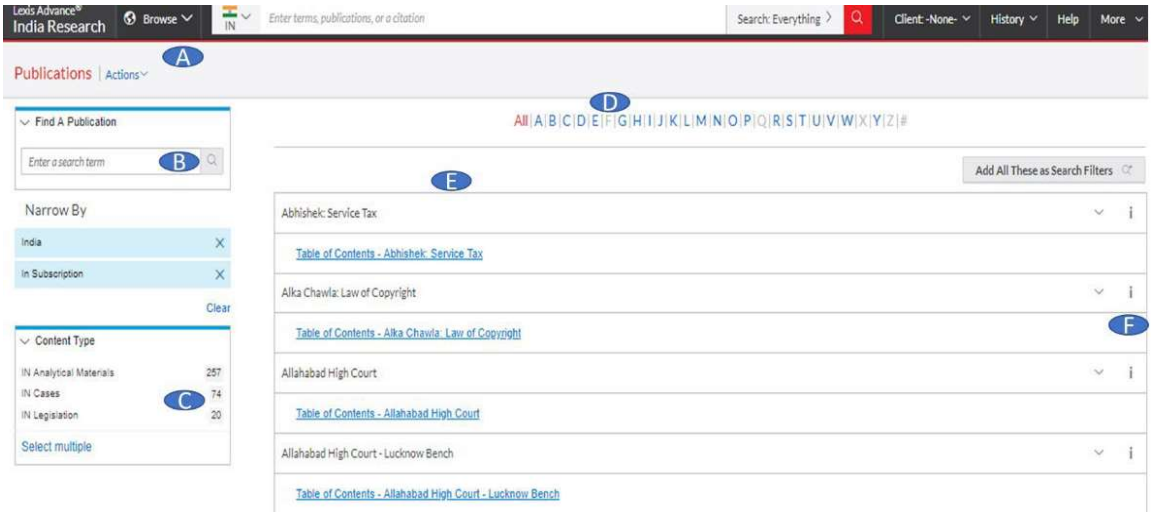
(H) Advanced Search helps you select search commands, wild cards, and terms and connectors. Also link to citation formats for retrieving the judgment and *Case citator* document for a case citation.

(I) Click Search to close the Filter box when you've finished selecting filters.

Browse Publications: Find Specific Publications to Search and Browse

You don't need to select publications before you search Lexis Advance. However, if you want to search specific publications, you can find them in two ways.

1. If you know the publication name or partial name, enter it in the red search box.
   - Select a publication title to add it to your search.
   - Select a source's Table of Contents (TOC)link to browse the TOC all the way through to document level; search the full TOC or select specific parts of the TOC to search and/or deliver.
2. You can also search or browse the publication listing in the following ways:



(A) Click Browse then select Publication. Browse by jurisdiction or content type. Or click All Publications to search and browse alphabetically by title.

(B) Enter a title or partial title. Suggestions are provided as you type. Click the grey magnifying glass to search.

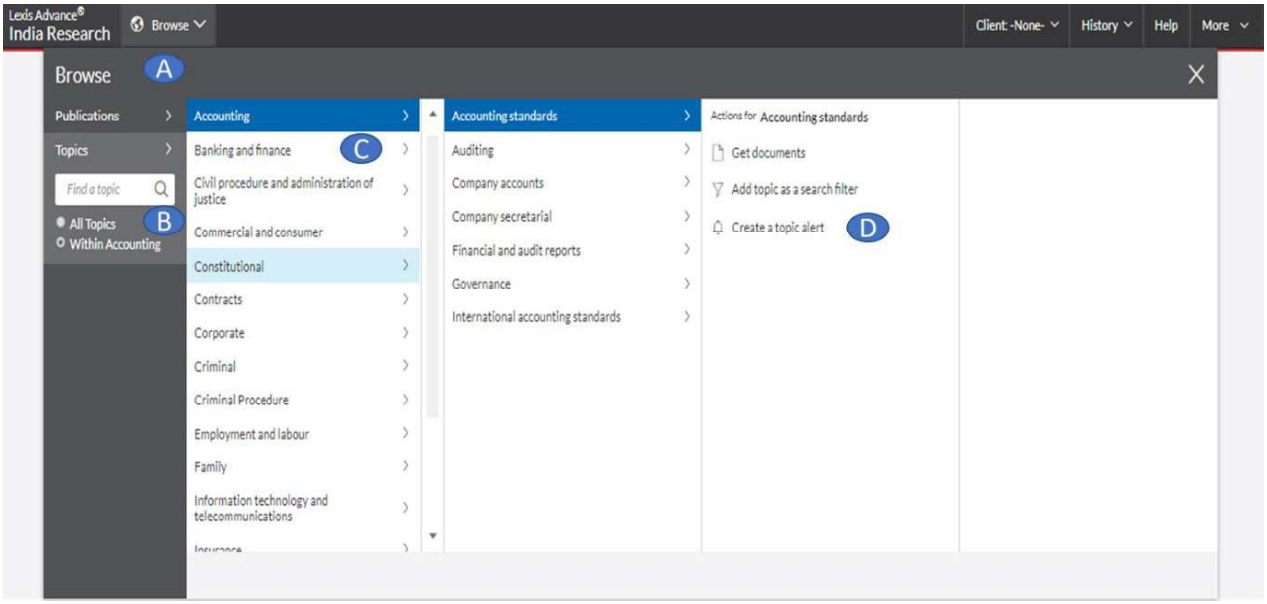
(C) Filter publications by content types, jurisdictions and subscription. Find what you need quickly by selecting filters

(D) Browse publications alphabetically. Use this bar first to select a letter. Then add content type, jurisdiction and subscription filters. Click a publication link to browse the table of contents or to add the publication as a pre-search filter.

(E) Click the information icon to display the publication 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.



(A) Search for specific topics or browse through the Lexis Advance legal topic hierarchy. Click Browse and then select Topics.

(B) You can search for specific topics. Enter your search words and click Search

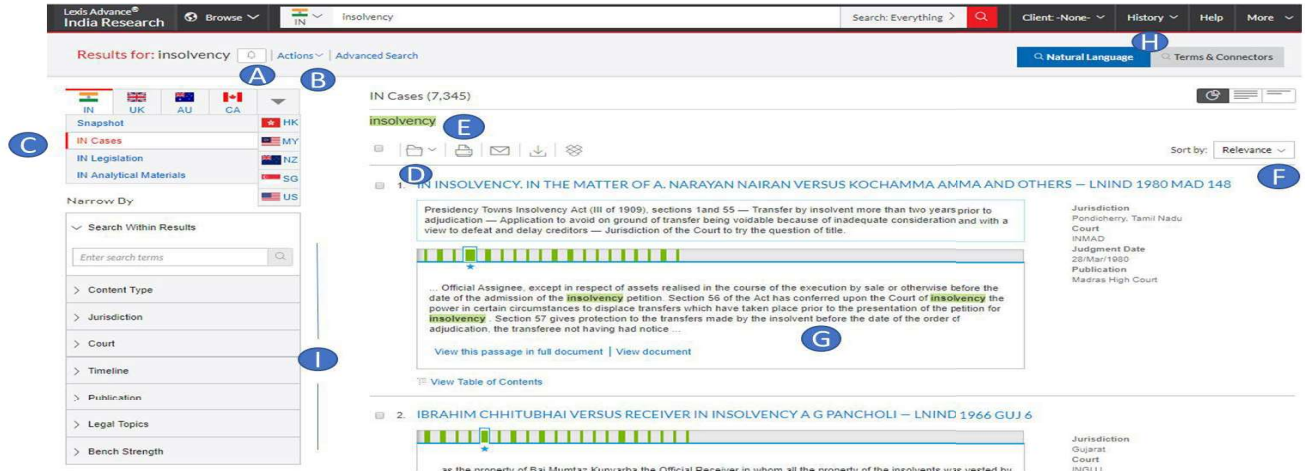
(C) Browse levels of the legal topic hierarchy. Click a Topic link. Select a topic or use the arrows to open or close additional levels.

(D) Use your topic in your research. Once you choose a topic, you can:

- View Lexis Advance search results on this topic, such as relevant cases, legislation, commentary and journals.
- Add it to a search (and add your own search terms).
- Create an Alert on the topic. Your Topic Alert will be added to your landing page Alerts pod.
- To make it a Favourite—and add it to your Favourites pod—click the Star icon next to the topic in the Recent and Favourites list.

Search Results: Find Most Relevant Documents Fast

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.

(B) Select Actions to add a search to a folder or expand your search.

(C) See the top three 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 the document titles you need and then click the appropriate icon. Also create a print-friendly page of your results.

(F) Sort documents. Default is by relevance. Use this pull-down box to re-sort by date, court, jurisdiction, etc.

(G) Determine relevance. See your search terms in context to help determine which documents are on point.

(H) Return to prior research tasks. Click History and select a prior search or document.

(I) Refine your search. For a smaller, more focused results set Filter by:

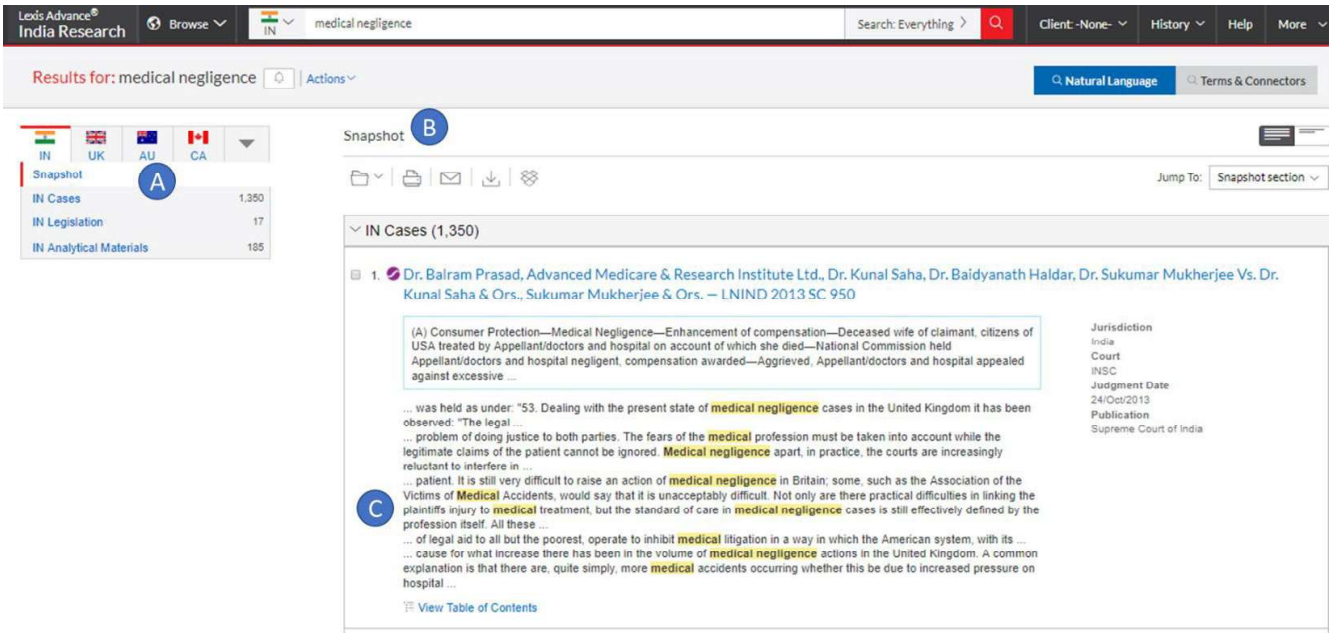
(J) Content type, eg select from legislation, forms and precedents, and more.

(K) Date by sliding the timeline or enter dates. (Not shown).

(L) Adding more words to your search. Enter them in the Search Within Results box.

(M) Content-specific options, such as refining cases by court. Each content type offers different filter options, so you can only filter one content type at a time

Snapshot View: View the Most Relevant Results on One Screen



Save time by browsing the most relevant documents retrieved by your search—in one screen—with the Snapshot View. Save more time by using the Snapshot View to deliver multiple documents, eg, 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 types in your search are open to display automatically.

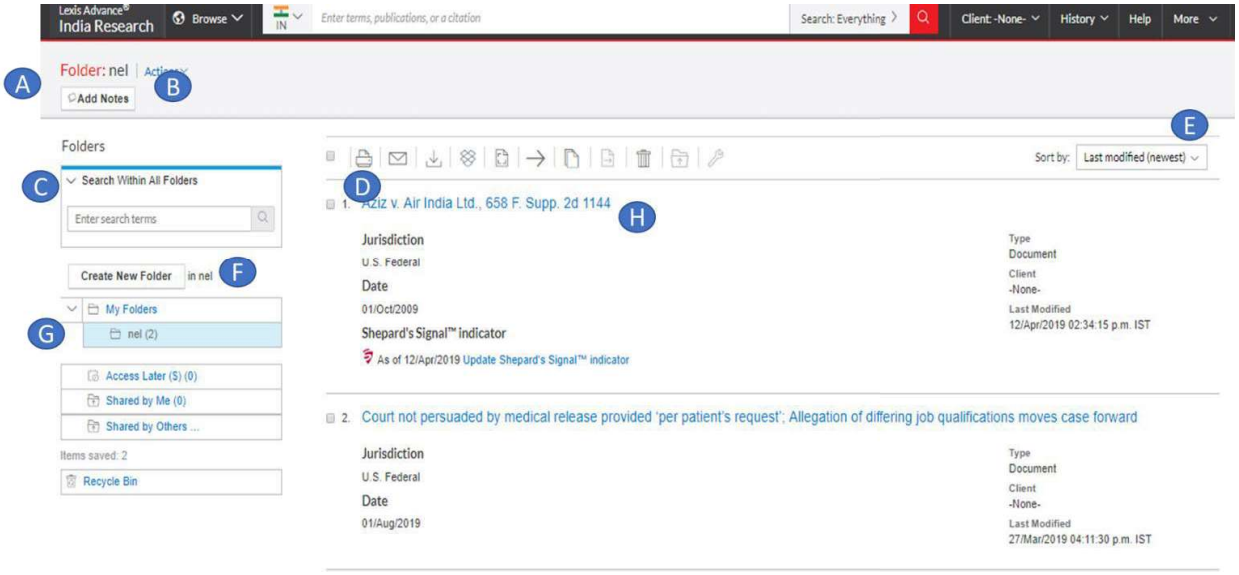
(B) Deliver or save documents across content types. Browse and check the boxes of the document you want and click the print, email or download icons or the Folder icon.

(C) Click a document link to open the full-text document.

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 all Lexis Advance screens and choose folders.

Save more than full-text documents, Copy and save selected document text, search results list, effective searches and research maps from History, weblinks and PDFs, 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 within your organization.



(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.

(C) Find vital facts across all folders and notes. Just enter your search words

(D) Use folder listings/documents. Check the box(es) next to the listing(s)/document(s) or check the Select All Box to use all listings/documents. Then you can choose to deliver, remove or share or manage options (if part of your subscription).

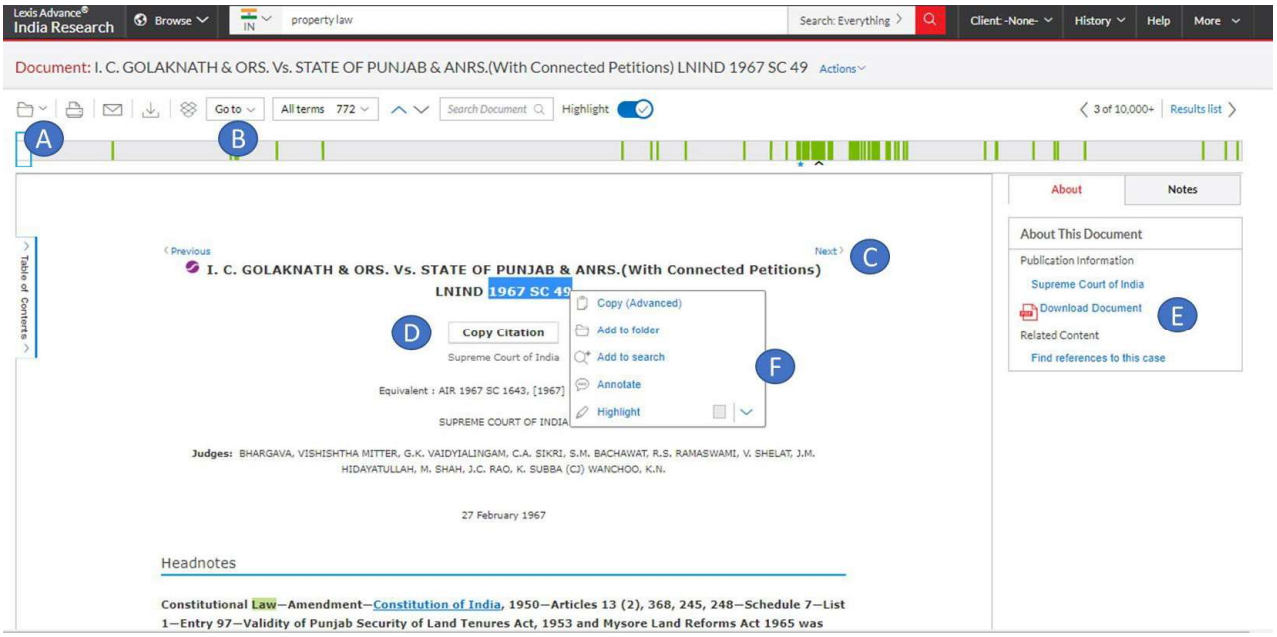
(E) Organize folder documents. Re-sort by date modified, newest documents, matter ID, relevance and more.

(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 publications 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.

Cases: Get more than Full Text



When you view a full-text case, you also have quick access to *Case Citator*.

(A) Save the document to a folder, print, deliver or share. Also request a printer-friendly version.

(B) Jump to specific document parts, eg, headnotes, holdings of court, judgments. 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.

(E) Open the court-ready PDF and other available case documents.

(F) 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 marked-up document to a folder.

Deliver: Print, Download and Email

Use the same, easy-to-remember delivery icons in the same screen locations across Lexis Advance. Look for these icons at the top of your results lists, TOC (Table of Contents) pages and full-text documents. (Actual configuration may vary slightly to fit the task. For example, full-text documents won't include the red number or Select All boxes.)

Delivery is simple and flexible with Lexis Advance because you can deliver one or more documents at once.

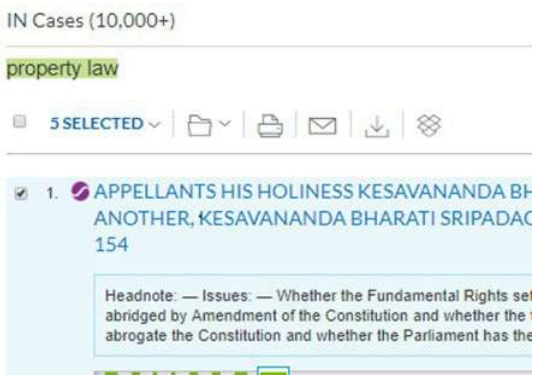
To deliver: Select All

One document: As you view the full text, select a delivery icon. Choose delivery options.

Multiple documents: Select the check box(es) next to the document(s) in a results list, even moving among content types. Select multiple documents from a TOC display.

The red box with the delivery icons keeps count for you. Then select a delivery icon and choose delivery options. No need to open documents to deliver.

Lengthy documents fast. Delivery icons "float" and stay on screen as you scroll lengthy, full-text documents such as cases or legislations Deliver quickly, without scrolling back to the top of the screen.



More than documents. Print your results list and lists of your Folder documents or Alert searches. Even deliver your Research History Map. You can also use the Printer-Friendly View icon, shown above, and your own device print functions to print.

Plus choose from many delivery options from the drop-down menu-and save a step later.

After you select a delivery icon, you choose delivery options. Or save a step and by pass options by selecting your default options. If you select Choose Settings, an option menu displays offering basic, formatting and content- specific options:

Print Options

Basic: Select a printer attached to your device. (Install the print/download utility software on initial selection.) You can also include your formatting choices on your cover page.

Formatting: Select fonts, search terms in bold, exclude cover page and other options. Even view highlights and annotations you add to the document.

Content-specific: For example, hide or include *Case citator* tables and signals.

Download Options

Basic: Send as PDF, Docx or WordPerfect® (.WP). You can group and/or compress files. Select file name and destination.

Formatting: Select fonts, search terms in bold, create a cover page and other options. Even include highlights and annotations you add to the document.

Content-specific: For example, hide or include *Case Citator* tables and signals.

Email Options

Basic: Send as PDF, Docx, or WP and/or compress files. Add recipient addresses, subject and message.

Formatting: Select fonts, search terms in bold, etc, plus cover page and other options. Even include highlights and annotations you add to the document.

Content-specific: For example, hide or include *Case Citator* tables and signals.

Get Updates Automatically: Create an Alert

To set up an Alert, look for the Alert "alarm clock" icon. You'll find it at the top of most screens when you're conducting tasks that may require updates. For example, it's located conveniently at the top of your Search results screen.

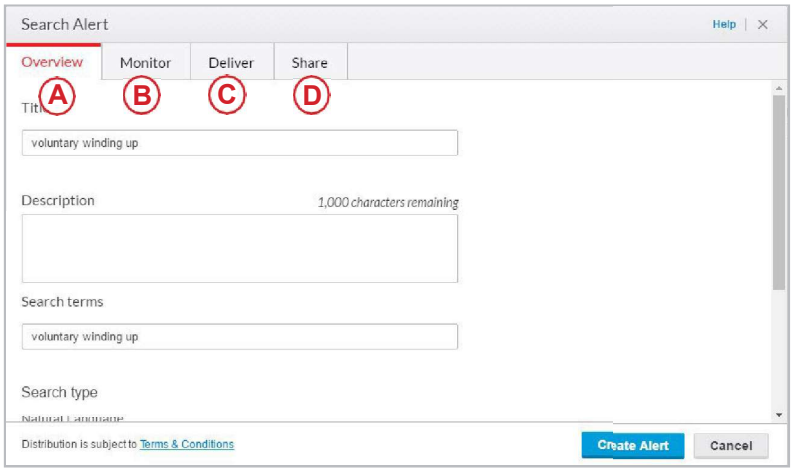
Select the Alert icon and then choose your update options

Move through the options screens in seconds, selecting just what you need.

(A) Overview options: Select an Alert title, review/edit search terms, add a description and select a client matter (optional).

(B) Monitor options: Your options mirror your search, eg, if you searched case law, legislation and web content, you can include any or all that content in one alert update.

(C) Deliver options: Select start and end dates, online or email/online delivery, etc. Plus select the update frequency. Choose the delivery day and time. Or select as updates are available to get alerts as they are released.



(D) Share options: Add email addresses so colleagues also receive alert updates.

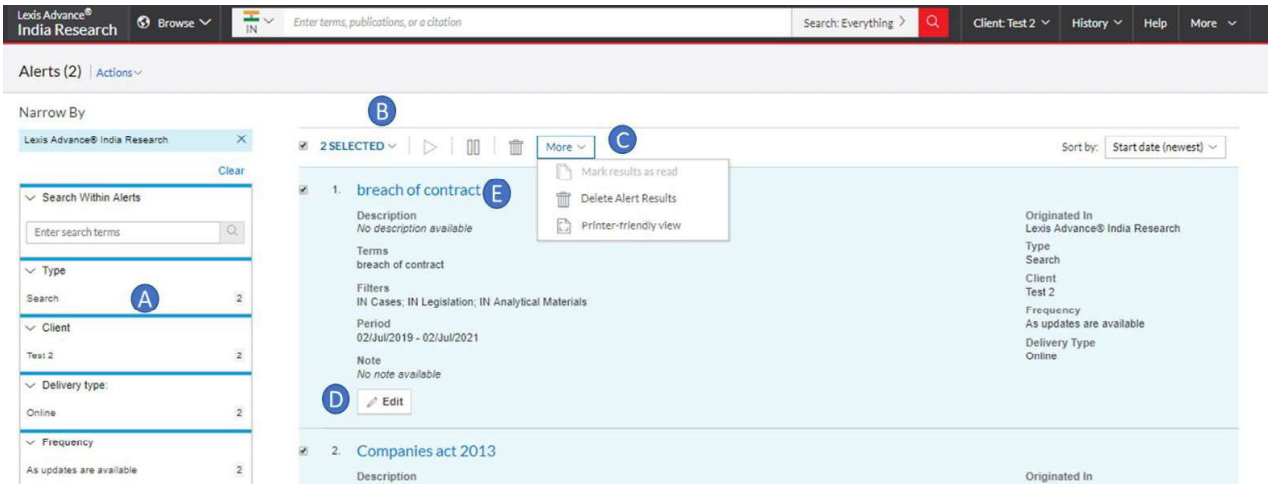
View Alerts results

Email updates come to your inbox. View search terms to determine relevance. Select documents, review and use internal document links to navigate to other relevant documents.

Plus, you can view all your Alerts and check for updates from the Lexis Advance home page. Check the Alerts pod. The blue dot notifies you that update results are available for that item. To view an alert, select its link from the Alerts pod. Or select View all alerts (or Alerts from the More pull-down menu) to move to your Alerts management screen.

Manage Alerts: edit, delete, pause, etc.

On the Alerts management screen, you can:



(A) Filter Alerts, including by search term, type, matter, delivery type and / or frequency.

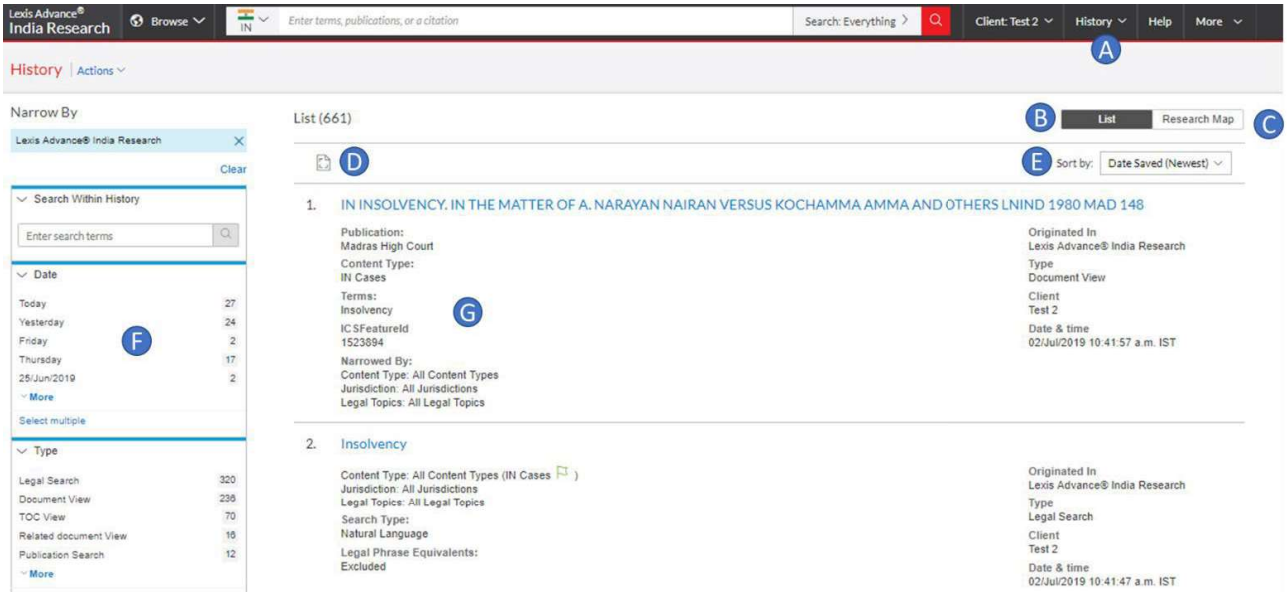
(B) Use the icons to:
- Select multiple alerts for edits - as you select, the red box counts for you
- Start alert updates again after pausing
- Pause the alert updates
- Delete the alert updates

(C) From the More drop-down option browse and delete all results quickly. Or keep the results and mark as read.

(D) Editor add search terms, content or change delivery frequency (available when email option selected) and other options.

(E) Move to your search results; select the alert title link.

History: View Searches and much more in the List View



View search history for the past 90 days. View searches, documents retrieved, including Case citator signals, YoucanviewyoursearchhistoryinaListvieworasagraphicalresearchmap.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.

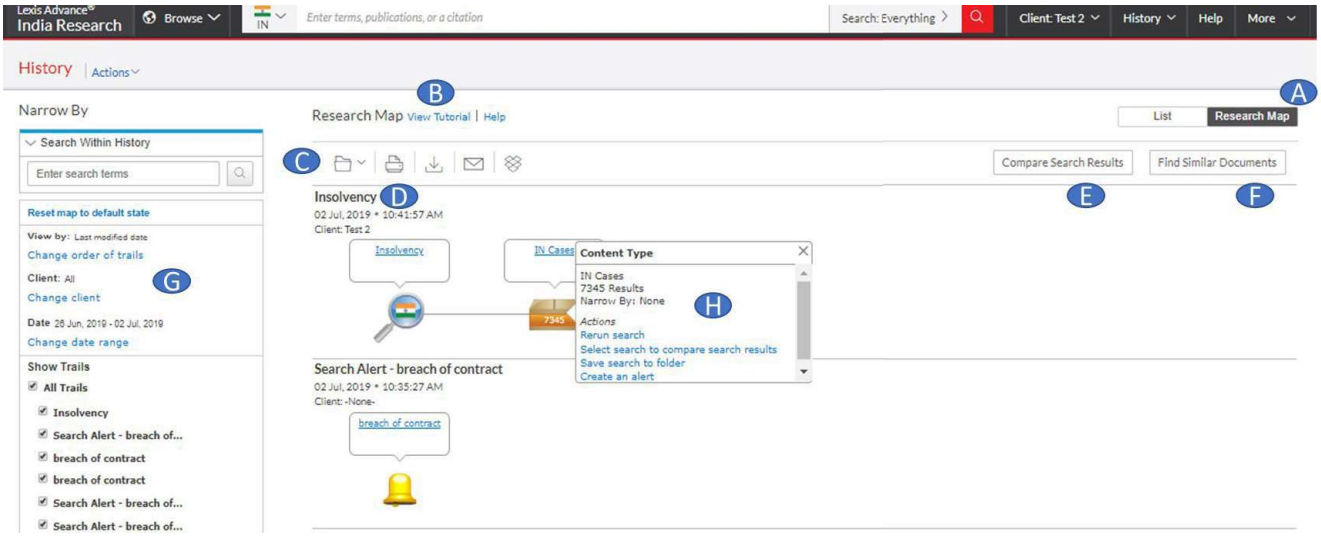
(D) Print your history. Get a printer-friendly list of searches. Then click the Print button.

(E) Sort your history by date (oldest or newest first), matter ID (highest or lowest first), search type or search title (alphabetical or reverse alpha order).

(F) Filter history to display by date or date range, matter ID, eg, alerts created, email sent, web searches and legal searches. 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 content types, search type, eg, natural language, search terms, task type, and more.

History: Use the Research Map to Expand your Research



(A) Get a step-by-step graphical depiction of your prior research. Click Research 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 Research Map to one of your folders.

(D) Share your Research Map via email or download. Request a print.

(E) Compare two to three search results to find common documents and 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 matter, date, etc. Search for words included in your map. You can also exclude specific searches, eg, trails, on your map or change the trail order. Click Reset Map to default state to clear filters.

(H) Re-run or save your work. Click a map icon and choose to re-run your search, save a search to a folder or create an alert.