

Lexis Advance[®] User Guide

Please note: All screens shown may change slightly as new, features and enhancements are added.

Log in:

www.advance.lexis.com/nz

Learn more:

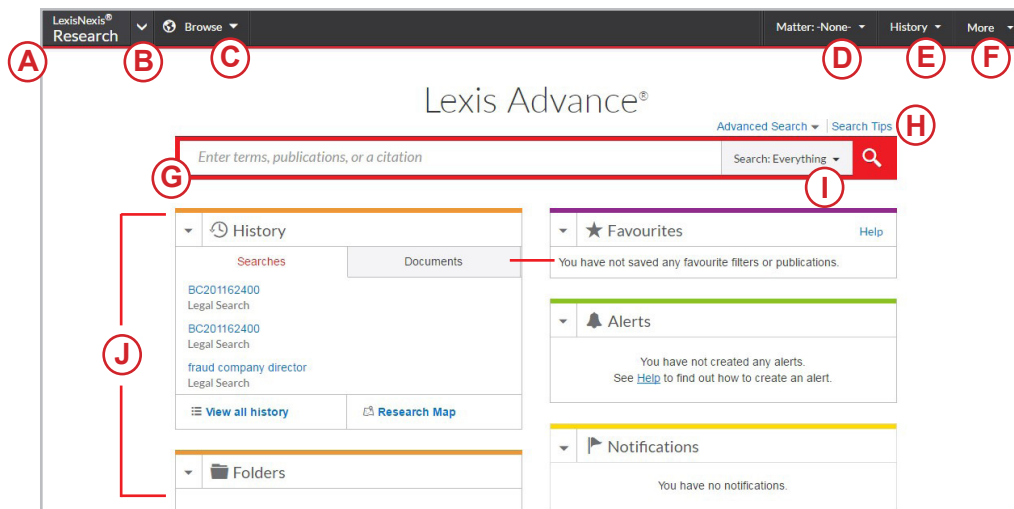
www.knowledge-network.lexisnexis.com.nz/home/

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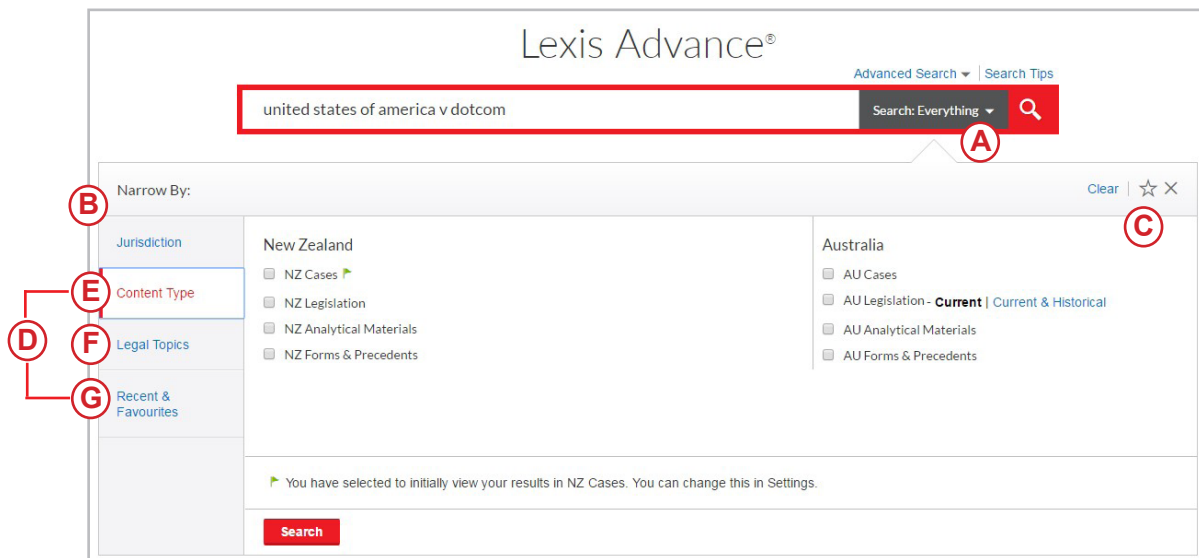
Start Your Search: Red Search Box (Home)

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



- (A) Return to this **home page**. Click the **Lexis Advance logo** on any screen.
- (B) Easily switch to **LexisNexis® Guidance** by clicking the down arrow.
- (C) **Browse** publications, legal topics or CaseBase. Browse the available list or search for specific publications or topics.
- (D) Set, change or edit **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, Feedback, Help, User Guide, Sign-in Profile, **LexisNexis Account Centre** and Sign Out from the **More** drop-down menu. Also gain access to Folders, Alerts and Notifications, or alternatively use the landing page pods shown on this page below the red search box.
- (G) Enter your search terms.
Either:
 - **natural language (free text)** and click Search. No source selection necessary.
 - **terms and connectors search**, eg, *contributory negligence w/s bicycle*, and click Search.
 - **citation**, eg, *[2013] 2 NZLR 139*, and click Search to retrieve the full-text document as well as search results for that citation.
 - **partial or full publication title**, eg, *The Laws of New Zealand*, to find a publication title to add to your search. Or retrieve the publication's documents.
 - **case name**, eg, *United States of America vs Dotcom*, and click Search to retrieve the full text case and CaseBase entry at the top of the results list, as well as search results for other references to that case.
 - **legislation title**, eg, *Companies Act 1993*, and click Search to retrieve results for the Act, Regulation, etc, 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 provision 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.
- (H) **Search Tips** get help with terms and connectors.
- (I) **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.
- (J) Get there quicker! Get fast access to Favourites, Folders, Alerts and legal topic update Notifications (a blue dot indicates that the item has new information). Also get access to Help topics.

Filter: Refine Your Search And Save Browsing Time



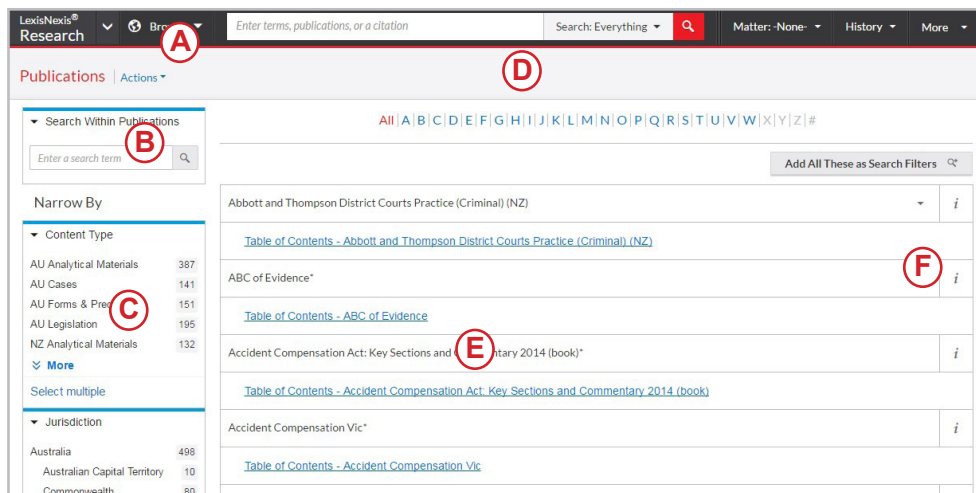
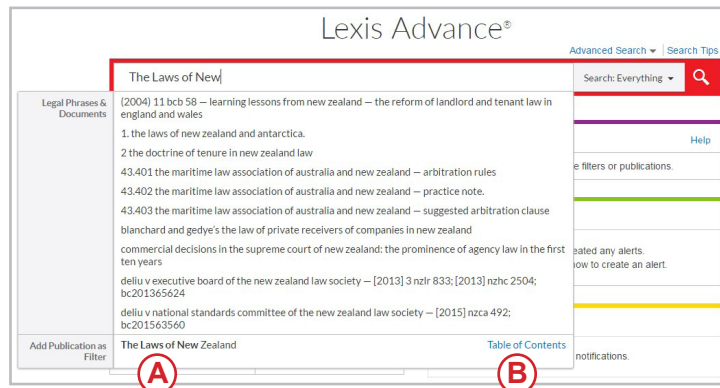
You can filter your search results to limit the number of documents that appear. You can also **save time by filtering before you search** by choosing jurisdictions, content types and/or legal topics. Add favourite publications, combinations of publications, recently used filter combinations or frequently used legal topics to your search. 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 to search only legislative sources and cases. Also choose which content category to display first.
- (F) **Legal Topics** options include more than 40 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 *CaseBase* 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.

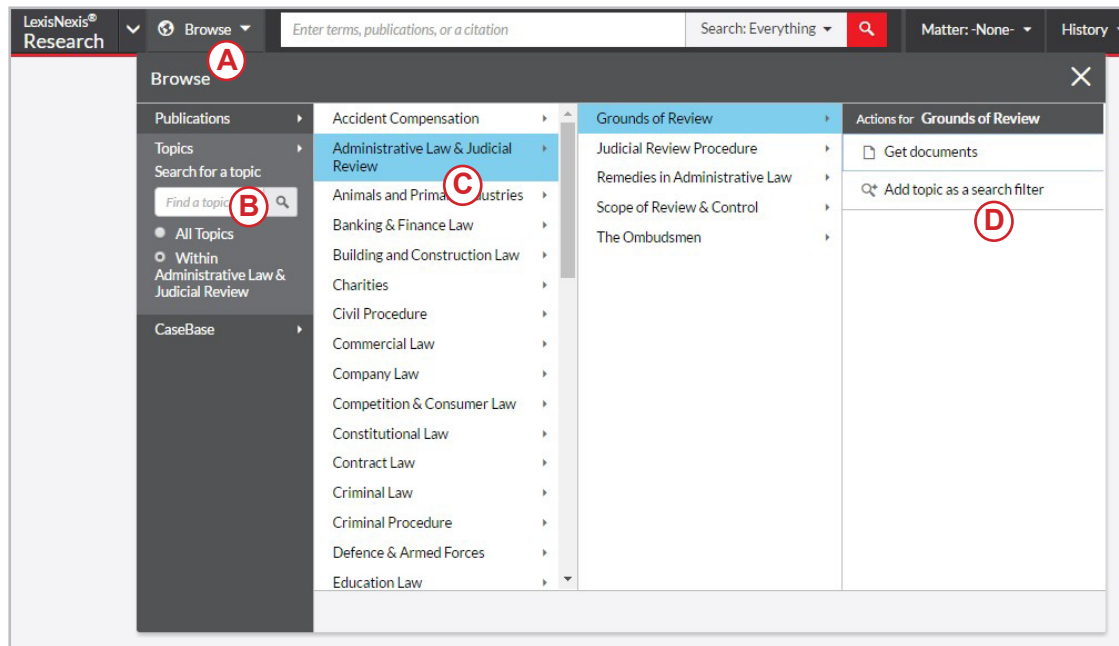
1. If you know the publication name or partial name, enter it in the red search box.
 - (A) Select a publication title to add it to your search.
 - (B) Select a source's Table of Contents (TOC) link to browse the TOC all the way through to document level; search the full TOC or select specific parts 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, eg. NZ Cases and then Commonwealth.
- (D) **Browse publications alphabetically**. Use this bar first to select a letter. Then add content type, jurisdiction and subscription filters.
- (E) **Click a publication link** to browse the table of contents or to add the publication as a pre-search filter.
- (F) 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).

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:

- **Content type**, eg select from legislation, forms and precedents, and more.
- **Date** by sliding the timeline or enter dates. (Not shown).
- **Adding more words to your search.** Enter them in the Search Within Results box.
- **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.

To add filters: Click a filter link; it displays in blue under Narrow By. To remove the filter just click the **X** in the blue box. Select and remove multiple filters.

The screenshot displays the LexisNexis® Research interface. At the top, the search term 'insolvency voidable transactions' is entered. Below the search bar, the results are categorized by content type, with 'NZ Cases' highlighted. A 'Snapshot' button is visible. On the left, a 'Narrow By' section allows filtering by content type, court, timeline, publication, and legal topics. The main results area shows two cases: '1. Timberworld Ltd v Levin' and '2. Sanson v Ebert Construction Ltd'. Each case entry includes a 'CaseBase | Linxplus' link, a date, a case number, and a brief description. Icons for print, download, and email are present next to each case. A 'Sort by' dropdown menu is located at the top right of the results area. The page also includes a 'History' link in the top right corner.

Snapshot View: View the Most Relevant Results on One Screen

Results for: insolvency voidable transactions

Snapshot

Jump To: Snapshot section

1. [2015] 3 NZLR 365 [2015] NZCA 111 BC201561038

the importance of assessing the overall effect of all of the transactions making up the running account which the parties maintained pursuant ...
... See also F Assaf, B Shields and H Kincaid Voidable Transactions in Company Insolvency (LexisNexis, Chatswood (NSW), 2015) at [4.62]. 71 At 505. ...

2. Sanson v Ebert Construction Ltd

CaseBase | Linxplus [2015] NZHC 2402 BC201563255

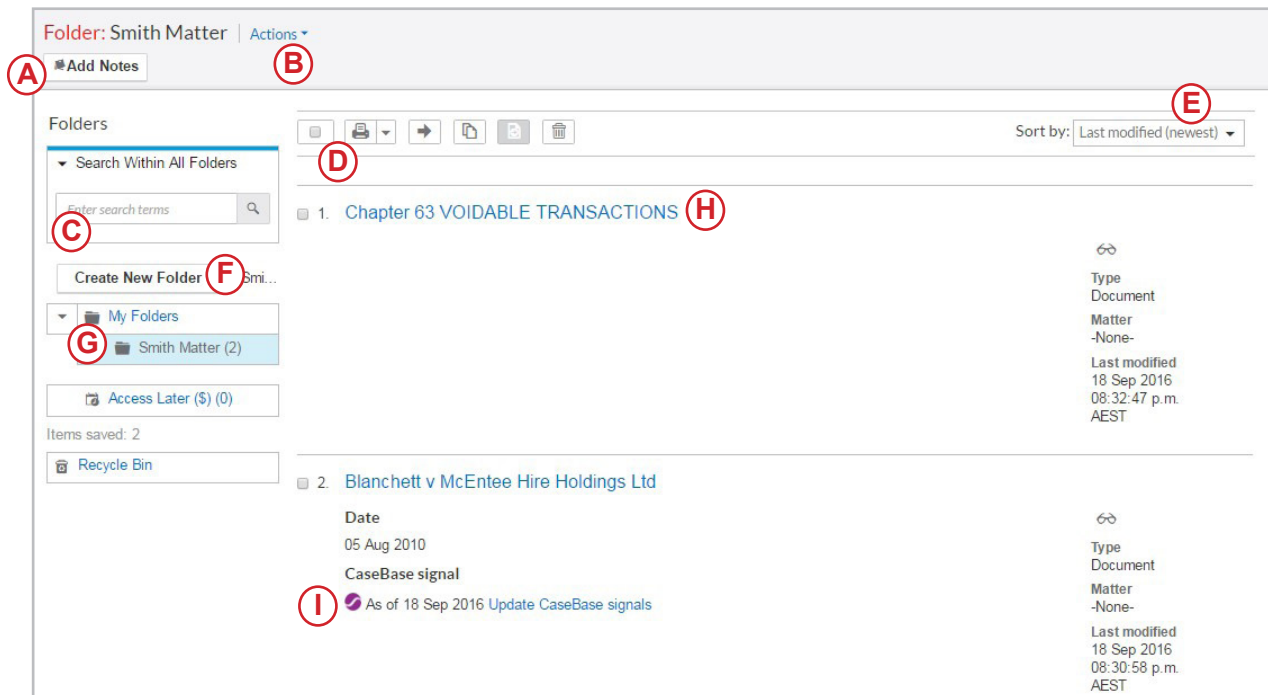
Save time by browsing the most relevant documents retrieved by your search—in one screen—with the **Snapshot View**. Save more time by using the Snapshot View to deliver multiple documents, eg, print or email to colleagues or save multiple documents to Folders.

- (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.

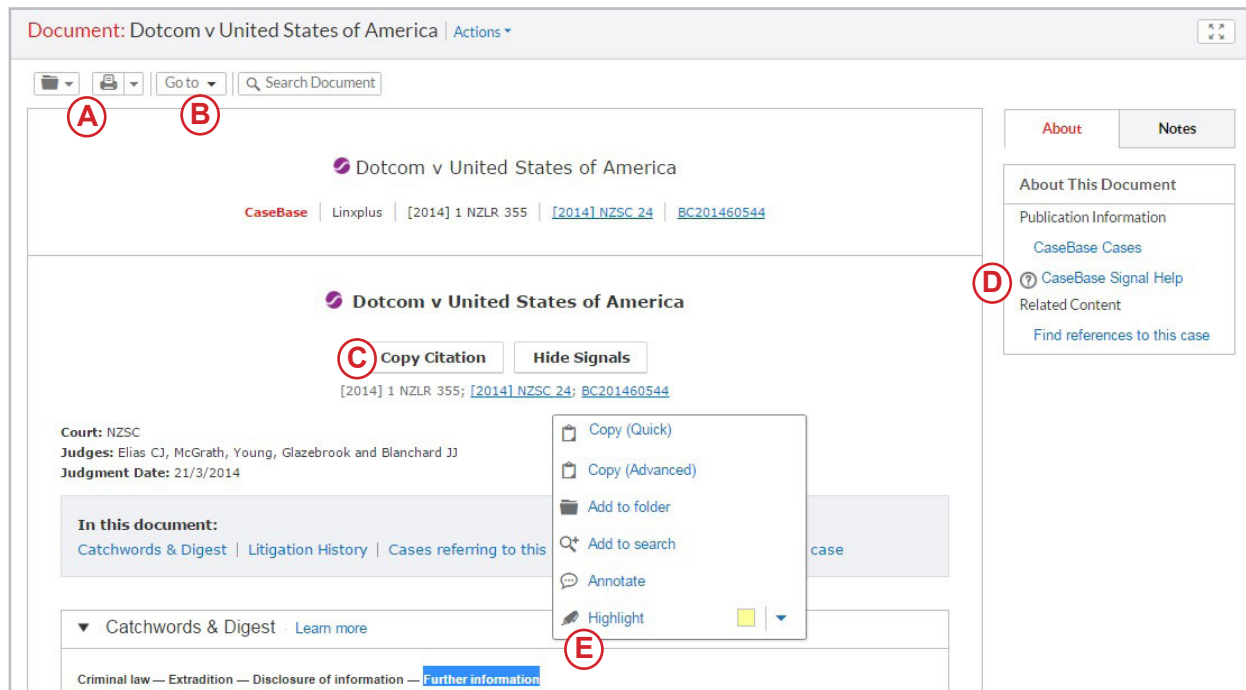
Gain access from the Folder pod on the landing page or click the More pull-down menu at the top of all Lexis Advance screens and choose folders.

Save more than full-text documents. Copy and save selected document text, search results lists, effective searches and research maps from History, web links and PDFs, as well as documents from LexisNexis Guidance. Subscription documents stay in folders until you remove them. If your organisation has the folder sharing option, you can share folder items or entire folders and manage access within your organisation.



- (A) **Add folder notes.** Click and add up to 4000 characters.
- (B) **Move, copy or delete folders.** Click Actions. Also download the folder, rename it or update all *CaseBase* signals.
- (C) **Find vital facts across all folders and notes.** Just enter your search words, eg *front pay*.
- (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 deliver, remove or share or manage options (if part of your subscription).
- (E) **Organise 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.
- (I) **Ensure cases documents are good law.** See immediately when a document was checked via *CaseBase*. Update if needed.

CaseLaw: CaseBase & Full Text



When you view *CaseBase Case Citator*, you also have quick access to a full-text case, our vital case-analysis resource.

- (A) **Save the document** to a folder, print, deliver or share. Also request a printer-friendly version.
- (B) **Jump to** specific **document parts**, eg, catchwords, headnotes, holdings of court, judgments. Move among search terms or reporter pages.
- (C) **Copy the full-case citation** for your work. Include parallel citations and a link to the full-text case.
- (D) Find **Signal Help** to fully explore the meaning behind each of the CaseBase signals
- (E) **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:

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 onscreen as you scroll lengthy, full-text documents such as cases or annotated statutes. 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 bypass 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 *CaseBase* 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 *CaseBase* 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 *CaseBase* 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 of 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.

The screenshot shows the 'Search Alert' form with the following fields and labels:

- Overview** (Label A): The first tab, containing fields for Title, Description, Search terms, and Search type.
- Monitor** (Label B): The second tab.
- Deliver** (Label C): The third tab.
- Share** (Label D): The fourth tab.

The form includes a 'Create Alert' button and a 'Cancel' button at the bottom right.

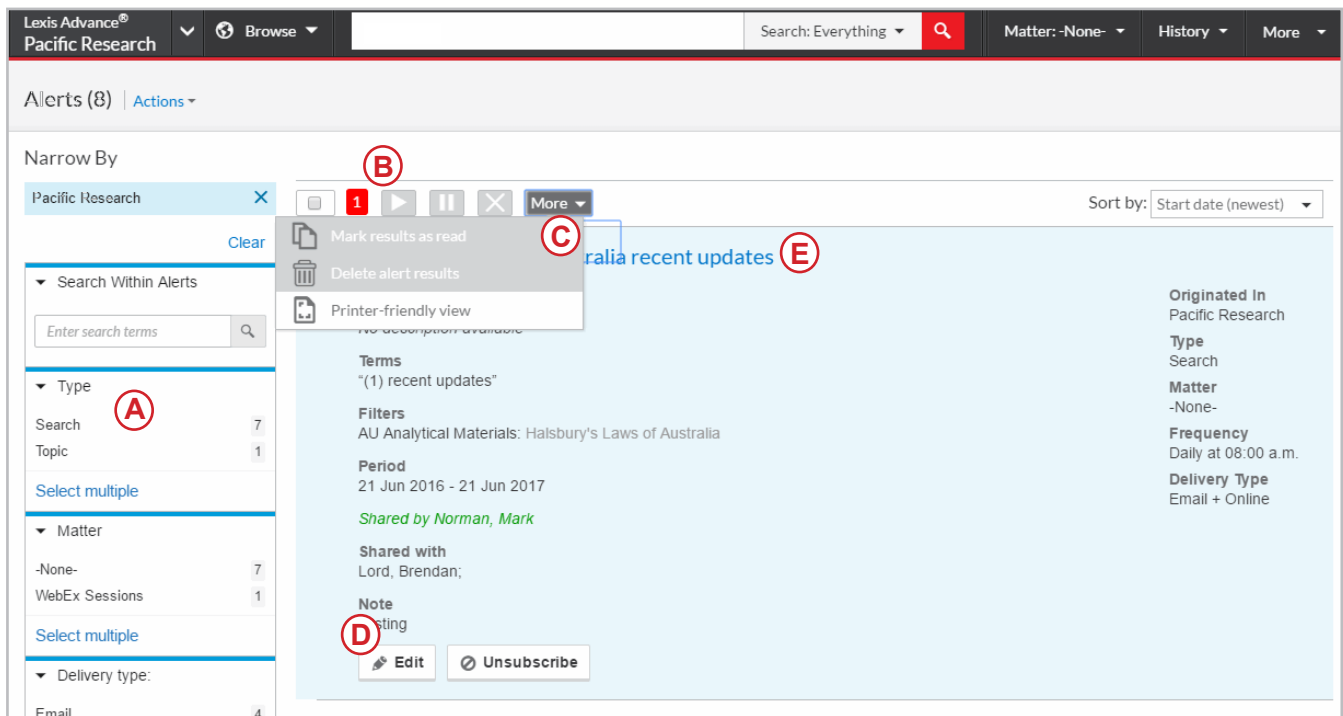
View Alerts results

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.



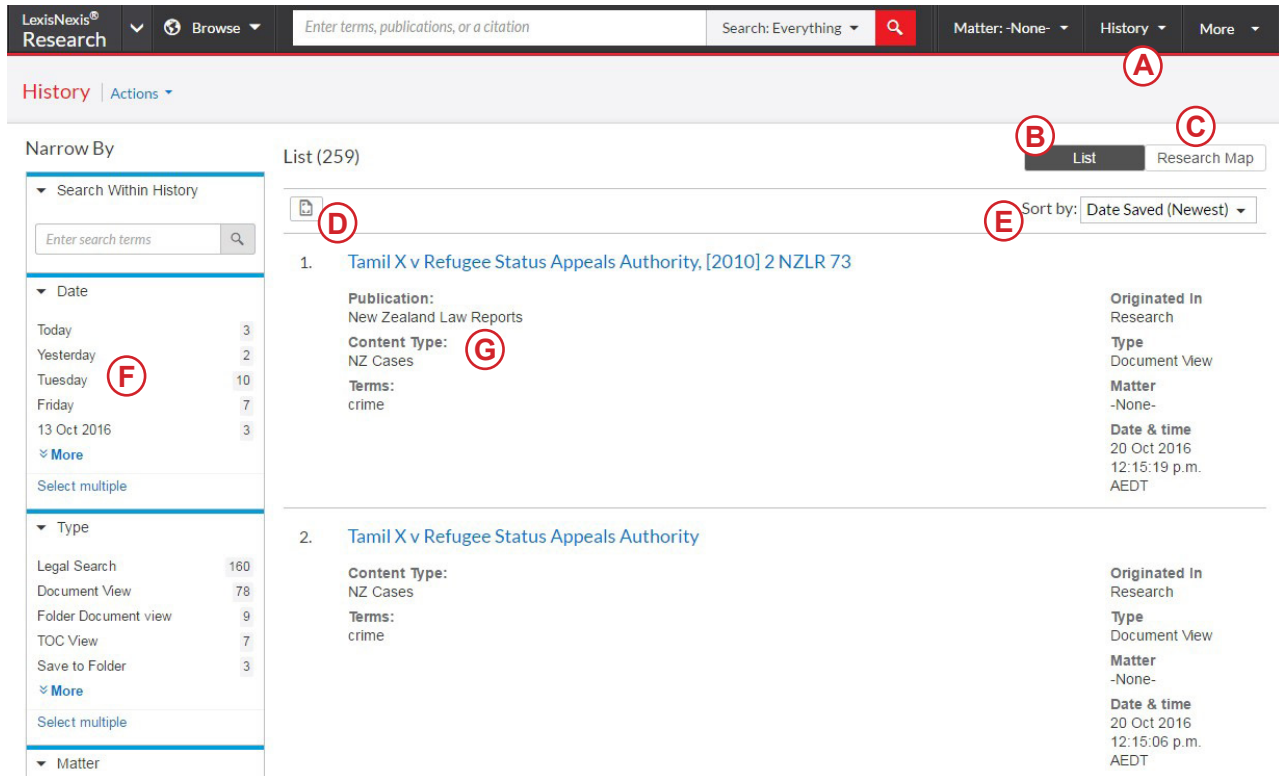
Manage Alerts: edit, delete, pause, etc.

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) Edit or add search terms, content or change delivery frequency (available when e-mail option selected) and other options.
- (E) Move to your search results; select the alert title link. The content bar (not shown) shows which content has updated results. Look for the blue dots.

History: View Searches and much more in the List View



LexisNexis® Research

Enter terms, publications, or a citation

Search: Everything

Matter: -None-

History

More

History | Actions

Narrow By

Search Within History

Enter search terms

Date

Today 3

Yesterday 2

Tuesday 10

Friday 7

13 Oct 2016 3

More

Select multiple

Type

Legal Search 160

Document View 78

Folder Document view 9

TOC View 7

Save to Folder 3

More

Select multiple

Matter

List (259)

List Research Map

Sort by: Date Saved (Newest)

1. Tamil X v Refugee Status Appeals Authority, [2010] 2 NZLR 73

Publication: New Zealand Law Reports

Content Type: NZ Cases

Terms: crime

Originated In Research

Type Document View

Matter -None-

Date & time 20 Oct 2016 12:15:19 p.m. AEDT

2. Tamil X v Refugee Status Appeals Authority

Content Type: NZ Cases

Terms: crime

Originated In Research

Type Document View

Matter -None-

Date & time 20 Oct 2016 12:15:06 p.m. AEDT

View search history for the past 90 days. View searches, documents retrieved, including CaseBase signals, documents delivered (you can quickly resend them), web page views, and even searches from LexisNexis® Guidance. 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), 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 or task type, 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

The screenshot shows the Lexis Advance History page. On the left, the 'Narrow By' sidebar allows filtering by search terms, view by (Last modified date), client (All), date (12 Sep, 2016 - 18 Sep, 2016), and trails (All Trails). The main area displays two research maps. The first map, 'United States of America v Dotcom', shows a search icon connected to a box with 46 results and a '+2' button. The second map, 'insolvency voidable transactions', shows a search icon connected to a box with 0 results and a '+1' button. The interface includes buttons for 'List', 'Research Map', 'Compare Search Results', and 'Find Similar Documents'. Red circles with letters A through H are overlaid on the interface to indicate specific features and actions.

- (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.