



THE NEW NEXIS[®] SERVICE

A GUIDE FOR INFORMATION PROFESSIONALS



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INTRODUCTION

WHAT IS LEXISNEXIS®?

LexisNexis has been the preferred choice for trusted information research for over 30 years. With the click of a mouse, LexisNexis customers can access over 5 billion documents from 34,000 sources comprising a wide array of authoritative news and business information, legal documents and public records. We help businesses, industries and government agencies collect, manage, and use information more productively.

WHAT IS THE NEW NEXIS® SERVICE?

The new Nexis service is an enhanced and updated version of *nexis.com*®. Furthermore...

NEXIS IS EASY

Web-like navigation; easy, automatic source selection; and Natural Language searching are just some of the features that make the new Nexis service so user friendly. With improved features like a tabular interface and a 'bread crumb trail' across the top of the page so you never get lost, Nexis is easy to navigate, even for the non-information professional.

NEXIS IS FAST

Intuitive browse features; 'hit-to-hit' navigation; saved history and recent searches are some of the features that get you to the right results fast. From the ability to narrow a search on the results page to improved delivery options, you can now pinpoint the information you need more quickly and efficiently incorporate that information into your work product.

NEXIS IS UNMATCHED

With precise source selection, one-step search refinement, and results group classification, the unmatched content of the LexisNexis services is brought to the surface and is easier to search than ever. You don't have to know all of the sources to find the results you need.

WHY USE THE NEW NEXIS SERVICE?

Because only Nexis enables you to get the facts you need to make the informed decisions that drive winning results.

ABOUT THIS USER GUIDE

This User Guide is intended primarily for use by librarians, deep researchers, and other information professionals. It is designed to provide not only an overview of search tools available on Nexis, but also to delve deeper into subjects of concern to the professional searcher, such as source selection, document indexing, search strategy development, search logic processing, and efficient results review.

It is expected that the user of this Guide has at least a basic understanding of online information retrieval. This Guide is not intended to answer every research question that may arise, but rather to give you the tools you need to find your own answers in the new Nexis service. There are always people at LexisNexis that can assist you by offering 24/7 Customer Support, or via telephonic and/or on-site training presentations. With this team of trusted experts as your information partner, you'll be a Nexis whiz in no time! Now let's get started.

Note:

Screen images found in this document may have been slightly modified in order to maintain the highest resolution possible while fitting within page margins.

GETTING STARTED

SIGNING-IN

Signing-in accesses the main Nexis service and other products you are authorized to use, such as Company Dossier and SmartLinx™. Also on this page, you may choose to use a secure connection throughout your research session, request an Email reminder of your password if you've forgotten it, and opt to bypass the sign-in page on subsequent research sessions. You may also see graphics and links to other information not pictured below.

Sign In to the Nexis® Service.

ID Enter your LexisNexis® ID.

Password Enter your LexisNexis® password.

Sign In After providing your ID and password, click this button to begin your Nexis® session.

ID

Password **Sign In**

[Sign-In Tips](#) | [Forgot Your Password?](#) | [System Requirements](#)

[Remember My Sign-In Information](#)

[Use a Secure Connection \(SSL\) for Entire Session](#)

Use of this service is subject to [Terms and Conditions](#). Please review them.

Forgot Your Password?

Click this link to receive an Email with access to your password information. (Note: For security reasons, you may be prompted occasionally to change your password).

Remember My Sign-In Information

To save your sign-in information, click this checkbox. On subsequent sessions, you will bypass the Sign-In page. If you use more than one browser, remember to save your sign-in information on each one.

To turn off the 'Remember My Sign-in Information' option, *sign-out* the Nexis® Service and click the link that reads '[Click here if you no longer want to save your sign-in information.](#)'

Note: This function is not recommended for use on public workstations.

Use a Secure Connection (SSL)

Secured Sockets Layer is the standard encryption protocol used to provide a secure connection. With SSL in place, information is encrypted before it is transmitted between your computer and LexisNexis®, blocking any attempt to observe this information by another party.

Your LexisNexis® sign-in information is always sent over a secure connection using Secure Sockets Layer (SSL). To transmit your *entire* session with a secure connection, click the 'Use a Secure Connection for Entire Session' checkbox.

Note: SSL encryption may result in slightly slow system performance over a dial-up connection.

SIGNING-OUT

You can sign-out and close your session with the Nexis service in either of two ways.

1. Click the in the upper right corner of the screen to close your browser and the Nexis session; Or,
2. Click [Sign Out](#) on the top navigation bar. You'll be disconnected from the Nexis service and the Sign-In screen will be displayed. You can then sign back in if you wish, go to a different Web location, or leave the Sign-In screen displayed for the next user.

CHANGING YOUR START PAGE

You may customize which screen you would like to display first when you sign-in to the Nexis service. You may do so from any Search, History, or Alert page. For example, if your research consists primarily of company report searches, you may want to have the Company Search form displayed as your 'start page.'

There are two ways to designate a form as your start page:

1. Display a Search, History, or Alert page then click the ['Make this My Start Page'](#) link in the upper right of the form; Or
2. Click [Preferences](#) in the top navigation bar and choose your desired default from the 'My Start Page' drop-down list.

You may always return to your start page by clicking the [Start](#) link from the navigation bar at the top-right of any page.

CHANGING YOUR PROJECT ID

On any Search form, you may enter a Project ID or name to associate with your Nexis research. This ID is used for identification and billing purposes. This is beneficial for keeping track of internal project costs or for billing the cost of research to a customer.

Before you've entered an ID, this space will read 'Project: [None](#)'; once you've entered a Project ID this space will reflect the project currently selected, such as 'Project: [User Guide](#),' or 'Project: [08-999-5683](#),' etc.

Simply click on the name of the current project to change it. The name you enter will be used for any future research until you change it again. The Project ID used for any previous searches will not change.

Note: The administrator of the LexisNexis account within your organization may dictate to LexisNexis whether or not the Project ID field is mandatory.

From the Preferences page, General Settings tab, you may also specify whether or not the Nexis service should maintain your Project ID across sessions.

CHANGING PREFERENCES

You can set a variety of Nexis service options by clicking the [Preferences](#) link on the top navigation bar, and then selecting either the 'General' or the 'Search and Results' tab.

Some of the options you can set on the General tab include:

- Your default start page
- How Project IDs are managed across sessions
- Language and time zones settings

Some of the options you can set on the 'Search and Results' tab include:

- Default View format for your search results
- Turn on/off automatic spell checker
- The number of documents displayed at one time in your search results
- Default full-document display format

For detailed information on the options and how to change them, click the help icon () on the Preferences page.

REGISTERING AN ID AND PASSWORD (IP-AUTHENTICATED USERS ONLY)

If you are an IP-authenticated user, you must register an ID and password to use personalization features such as Preferences and Saved Searches. In the top navigation bar, click the Customize/Register ID link. Enter the information and click Submit.

Note: Your ID must be a valid Email address. This Email address is also used for the 'Forgot Your Password?' feature, to send you an Email reminder with access to your password.

SEARCH TOOLS

OVERVIEW OF RESEARCH TOOLS

The screenshot shows the Nexis search interface. At the top left is the Nexis logo. To the right are navigation links: Start | Project: User Guide | Preferences | Sign Out | Contact Us | Help. Below the logo is a navigation bar with tabs: Search (A), Sources (E), and History & Alerts (F). Underneath is a secondary navigation bar with tabs: General, News, Company, Industry, Public Records, People, Country Profiles, and Legal. A red arrow (D) points to the 'Legal' tab. Below this is a search form with two tabs: Power Search (B) and Easy Search (C). The form includes a text input field for search terms, a search button, and a 'Search Within' section with checkboxes for News, People, Company, Countries, Industry, and Legal. A 'Specify Date' dropdown is set to 'All available dates'. At the bottom of the form are links for 'Save This Search' and 'Clear Form'. On the right side, there is a 'Related Links' section (G) with sub-sections: 'History & Alerts' (with links for Saved Searches, Recent Searches, Recent Documents, Alerts), 'Links' (with links for Business Portal, Government Portal, Searchable Directory of Online Sources, Knowledge Base, LexisNexis™ Risk Solutions, Courtlink), and 'View Tutorials' (with links for Overview, Selecting Sources, Working with Results, Scheduling Alerts).

A The **Search tab** is the jumping off point for all new searches regardless of what type of search you wish to conduct.

B The **General Power Search form** provides broad flexibility that you won't find on other Search forms. You may browse and select specific sources which might not be available on other forms, search sections within a document, find terms and companies within the indexing lookup tool, choose between Natural Language and Terms and Connectors searching, etc. It is also helpful when you have a general query, are searching in an unfamiliar area, or are searching across multiple content types.

C The **General Easy Search™ form** provides a very easy way to search when you're not completely familiar with searching methods or with which sources to use. You may enter any terms or phrases, with or without Connectors, and based on what you've entered the Easy Search™ feature will determine the best searching method (Terms and Connectors or Natural Language).

D The **Guided Search forms** point you in the right direction when you know the type of information you are looking for. Looking for an article from the New York Times? Try the News form. Looking for financials on a Company? Try the Company form, and so on. The Search form selected will automatically point you to the sources that are most relevant to your selection. Enter your terms in a fill-in-the-blank format. Select your own date range and specific source titles and go. By choosing a specific category of information, as opposed to using a general form, you're already halfway to the answers you need.

E The **Sources Tab** provides access from any page to the Source Directory. You may browse the Source Directory by source category, or simply type in the name of the source you want to search using the 'find' feature. From here you may combine sources and name and create favorites for use in Power Search.

F The **History & Alerts tab** provides a single location in which to manage all of your past research activities, including recent searches, recently viewed documents, saved searches, and scheduled Alerts.

G The **Related Links** section will highlight other resources that may provide additional relevant information based on the current page you are viewing. It is also an area where you may quickly access answers to 'How do I...?' questions.

CONSISTENT FEATURES ACROSS SEARCH FORMS

Whether you select one of the General Search forms (Easy Search or Power Search), or one of the Guided Search forms (News, Company, Industry, etc.), you can expect to find certain common elements. Consistent features are illustrated below using the People form. The specific nature of how these features will appear may vary form-to-form, but the basic elements remain the same.

The screenshot shows the 'People' search form. At the top, there are tabs for 'Search', 'Sources', and 'History & Alerts'. Below these are navigation links: 'General', 'News', 'Company', 'Industry', 'Public Records', 'People', 'Country Profiles', and 'Legal'. The main form area is titled 'Biographical' and contains several input fields: 'Last Name', 'First Name', and 'Additional Terms'. The 'Additional Terms' field has radio buttons for 'Terms and Connectors' (selected) and 'Natural Language'. Below this is a text box with a note: 'Use connectors to show relationship of terms, e.g. artist W/10 award [View Connectors...](#)'. There are also dropdown menus for 'Select Sources' (set to 'Biographies Plus News') and 'Specify Date' (set to 'All available dates'). On the right side, there is a 'Related Links' section with three sub-sections: 'Related Searches' (with a link to 'Person Locator'), 'History & Alerts' (with links to 'Saved Searches' and 'Recent Searches'), and 'How do I...?' (with links to 'Search for attorneys and law firms?', 'Search for physicians?', 'Search for executives or celebrities?', and 'Search for government officials or politicians?'). At the bottom right of the form are links for 'Save This Search' and 'Clear Form'. A 'Search' button is located at the top right of the form area. Callout letters A through J are placed around the form to highlight specific features.

A Make This My Start Page
Look for the 'Make This My Start Page' link in the upper right hand corner of any Search form. Click this link to start subsequent research sessions from this page.

C Enter Search Terms
All Search forms will have a place to enter search terms. The specific options for entering terms will vary, but the form will guide you to enter the appropriate information.


E Specify Date
A Specify Date drop-down will appear on Search forms where date restriction is applicable. You may narrow your search to documents published on a specific day or within the date range you specify.

G Save This Search
After entering your search terms, click this link to save the search for reuse in the future or to set up the search as an Alert.

I Related Searches
Many Search forms will display a section to the right of the form that lists other related searches that you may wish to perform.

B Help Icon ?
You may access in-depth information about any Search form by clicking the question mark icon (?) in the upper right corner of any form. The assistance you receive will be specific to the form that you have selected.

D Select Sources
Most Search forms will offer you sources to choose from. These sources typically appear in a drop-down or as category checkboxes. These sources will be related to the particular Search form that you've selected.

F  Search To begin the search, click the Search button on any Search form.

H Clear Form
Click this link to clear all of your entries from the form and start again with the default settings.

J How do I...?
'How do I' questions appear to the right of each Search form in the 'Related Links' section. These questions address commonly requested information needed by users and are specific to the particular Search form selected.

SEARCH TAB - GENERAL SEARCH FORMS

General Search forms allow you to combine sources across different content categories including News, Company, Industry, People, Countries, and Legal. When you want to cast your net wide by searching a variety of sources all at once a general search using either the Easy Search form or the Power Search form is the best place to begin.

GENERAL EASY SEARCH FORM

Use the Easy Search form if you're not familiar with advanced searching methods or you're not sure which sources to use. This form automatically creates a Natural Language or Terms and Connectors search based on your input.

The screenshot shows the 'Search' tab interface with sub-tabs for 'Sources' and 'History & Alerts'. The 'Search' sub-tab is active, showing a navigation bar with categories: General, News, Company, Industry, Public Records, People, Country Profiles, and Legal. Below this, the 'Easy Search' sub-tab is selected. The form includes a search input field (A), a 'Search Within' section (B) with checkboxes for News (checked), People, Company, Countries, Industry, and Legal, and a 'Specify Date' dropdown (C) set to 'All available dates'. A 'Search' button is located to the right of the input field. At the bottom right, there are links for 'Save This Search' and 'Clear Form'.

- A Enter Search Terms**
Enter terms to search. You may enter a question, a statement, or simply a list of words describing the concepts desired. Use quotation marks to look for exact phrases. The Easy Search feature performs a full-text search (not field restricted) using Natural Language Technology to make searching easy.

How does Natural Language Searching work?

This type of search uses associative retrieval technology to determine the statistical relevance of documents in relation to the terms in a search description. The Natural Language algorithm analyzes the words in the search description. It then:

- Eliminates common words (noise words) and reserved words (AND, OR, AFT, etc.)
- Identifies phrases
- Identifies unique words, based on their frequency in the database(s) being searched
- Assigns an importance weight to each search word or phrase based on how often it appears in the file and in the documents. The fewer the occurrences of a word, the greater the importance
- Ranks the retrieved documents based on the number of search terms in the document and the term importance

The Natural Language feature works best when you:

- Need to research general or conceptual issues, rather than very specific topics
- Don't know much about an issue except for a few basic terms
- Are researching a complex issue and can't construct an effective search using Terms and Connectors
- Don't feel comfortable writing search requests using Terms and Connectors
- Want to supplement a Terms and Connectors search to ensure thorough results

Note: Easy Search will also recognize and process certain Connectors (W/N, W/P, W/S, etc.) if you use them. If you do not enter Connectors between your terms the Easy Search feature will process your terms as a Natural Language search.

Narrow Search Terms (not pictured)

(Appears only if you are editing a search.) If you entered any narrow search terms in your results, you may edit them in this field.

B Search Within

Select the major categories of sources within which you would like to search. Click [Select All](#) to choose all the categories; click [Clear All](#) to remove any previous selections. Sources are briefly described below for more detail click the **i** next to any source name.

<p><input checked="" type="checkbox"/> i News</p> <p><input checked="" type="checkbox"/> i Company</p> <p><input checked="" type="checkbox"/> i Industry</p>	<p>Searches all news sources and goes back 2 years.</p> <p>Combines key sources of profiles and reports on the world's <i>major</i> public and private companies.</p> <p>Combines all sources of industry and market reports, except Investext@.</p>	<p><input checked="" type="checkbox"/> i People</p> <p><input checked="" type="checkbox"/> i Countries</p> <p><input checked="" type="checkbox"/> i Legal</p>	<p>Contains biographical reference sources, such as Who's Who, and directories on people.</p> <p>Includes forecasts, profiles, and risk reports for various countries.</p> <p>Searches Federal & State case law, plus law reviews and American Law Reports.</p>
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C Specify Date

You may narrow your search to documents published on a specific day or within the date range you specify.

Select a custom date restriction (described below) from the drop-down list.

All Available Dates	Removes all date restrictions from your search
Today	Restricts your search to only results from the current day
Date is...	Searches a specific day
Date is before...	Searches all documents published on or before a specific date
Date is after...	Searches all documents published on or after a specific date
Date is between...	Searches all documents published within a date range
Previous week	Searches all documents published within the past week
Previous month	Searches all documents published within the past month
Previous 3 months	Searches all documents published within the past three months
Previous 6 months	Searches all documents published within the past six months
Previous year	Searches all documents published within the past year
Previous 2 years	Searches all documents published within the past two years
Previous 5 years	Searches all documents published within the past five years
Previous...	Searches all documents published in the previous N days, weeks, months or years, where N is a number that you specify

Note: Some source categories cannot be searched by date.

GENERAL POWER SEARCH FORM

Use the Power Search form to search for documents in a variety of news, business, public records or legal sources. The Power Search form offers the most flexibility in terms of source selection and search construction. Select and search broad categories of information, or handpick individual publications; create complex searches, or rely on Natural Language technology.

A Enter Search Terms Terms and Connectors Natural Language

hlead(lexisnexis or lexis nexis) and new nexis

[AND ONLINE INFORMATION VENDORS](#)

[OR INTERNET CONTENT PROVIDERS](#)

[OR ONLINE LEGAL RESEARCH](#)

Relevancy: Major terms only

Use connectors to show relationship of terms, e.g. cat **OR** feline, john **W/2** smith [View Connectors...](#)

[Add precision keywords \(SmartIndexing\) to your search...](#)

B Select Sources

or News Industry Countries

Company People Legal

C Search within Document Sections

[+] [Show](#)

D Specify Date Oct 22 2005 To Apr 22 2006

[Save This Search](#) | [Clear Form](#)

- A** Enter Search Terms
- B** Select Sources
- C** Search within Document Sections (optional)
- D** Specify Date

DETAILS ABOUT EACH OF THESE FEATURES APPEAR ON THE TWO PAGES THAT FOLLOW.

A ENTER SEARCH TERMS

- 1 Select **Terms and Connectors** to search using Connectors (AND, OR, AND NOT, etc.), wildcards (! or *), and/or Precision Commands (ATLEASTN, CAPS, plural, etc.). If you choose this option but don't enter Connectors between your search terms, the system will search for your terms as an exact phrase. For more information on creating effective searches using Terms and Connectors please consult the Search Techniques, Strategies, and Processing Rules section, beginning on page 18.

1 Terms and Connectors 2 Natural Language

hlead(lexisnexis or lexis nexis) and new nexis Search

AND ONLINE INFORMATION VENDORS

OR INTERNET CONTENT PROVIDERS

OR ONLINE LEGAL RESEARCH

Relevancy: Major terms only

Use connectors to show relationship of terms, e.g. cat OR feline, john W/2 smith [View Connectors...](#)

3 [Add precision keywords \(SmartIndexing\) to your search...](#)

- 2 Select **Natural Language** to enter a question, a sentence or a few descriptive terms. Quotation marks may be used to indicate an exact phrase. Connectors, wildcards, and Precision Commands will be ignored if entered when Natural Language is selected in Power Search. If you select Natural Language, you may also enter terms in the Required Terms field, which only appears when Natural Language is selected. The system will not return a document unless it contains the terms you enter in this field. For more information on how Natural Language Search works see page 9.
- 3 [Add precision keywords \(indexed terms\) to your search...](#)

Click this link to add index terms to your search via the Index Term Lookup Tool.

Index terms help you focus your search on a specific topic or broaden your search to span an entire subject. This is an additional option when creating a search; indexing terms are not required. In the screenshot above, the second search box is filled with terms added from the Indexing Tool (**AND ONLINE INFORMATION VENDORS**, etc.).

For a detailed discussion on the use of Indexing, see the LexisNexis SmartIndexing Technology section beginning on page 31.

Narrow Search Terms (not pictured)

(Appears only if you are editing a search.) If you narrowed your search terms in your results, you may modify them in this field.

B SELECT SOURCES

1 *News, All (English, Full Text) 3 [Find More Sources...](#)

2 News Industry Countries
 Company People Legal

Search within Document Sections
[\[+\] Show](#)

Within the Power Search form you have three options for choosing sources to search:

- 1 You may select a Favorite Source or a Recently Used Source from the Select Sources Drop-down box.
- 2 Or, you may check-off the major categories of sources (News, Company, People, etc.) within which you would like to search. See previous section (page 10) for more details about the source categories.
- 3 Alternatively, click the [Find More Sources...](#) link or the **Sources Tab** (above the form) to access the complete Source Directory. You may use the Source Directory to Browse sources by category (News, Business, Legal, etc.), or you may Find sources by entering keywords to be found in the publication name.

The Source Directory also offers you the flexibility to combine sources, to give custom names to your own groupings of publications, and to save sources as favorites. For more information about choosing sources from the Source Directory see page 48.

C SEARCH WITHIN DOCUMENT SECTIONS

Click the [\[+\] Show](#) or [\[-\] Hide](#) links to show or hide the Document Section search options.

Search within Document Sections
[\[-\] Hide](#)
Select a section and enter terms.

1 Connector And Or

2 Section

3 Terms [Add to Search](#) **4**

Document Sections are specific, pre-defined fields of a document in which you may target your search. For example, you may search for keywords only within the headline section, or for a person's name only within the byline section. You may construct a search entirely out of Document Sections or combine a Document Section search with your other full-text search terms.

Follow the steps below to search within a Document Section:

- 1** Select whether to use the AND or OR Connector when your section restriction is added to your search.
- 2** Select a Document Section from the Section drop-down list. Only the sections available in the source you selected are shown.

If you selected a group source (e.g. Major Newspapers), all the sections available in any of the Individual Sources are shown. If you choose to combine sources across content categories (e.g. News and Legal), the sections that appear will be common to *all* of the types of documents you have selected, in some cases this will mean that no sections, or very few, will be listed.

- 3** Enter search terms that you'd like to appear in the section you selected.
- 4** Click the [Add to Search](#) link to add your section criteria to the Enter Search Terms field. The syntax of your section search will be automatically formulated.

Note: If you already know the name of the Document Section you want to use, and the proper format for entry, you may manually type these terms in the Enter Search Terms field if you'd prefer. See page 29 for more information on manually searching with Document Sections.

Repeat these steps to add as many Document Section criteria as you wish.

D SPECIFY DATE

You may narrow your search to documents published on a specific day or within the date range you specify. Select a custom date restriction from the Specify Date drop-down list. See previous section for more details about date restrictions, page 10.

SEARCH TAB - GUIDED SEARCH FORMS

Note: The forms available to you are determined by your LexisNexis subscription agreement.

Guided Search forms point you in the right direction when you know the type of information you are looking for. Looking for an article from The Washington Post? Try the News form. Looking for a profile or financial report on a company? Try the Company Profiles form, and so on.

The search form selected will automatically provide you with a list of sources that are most relevant to your selection. For instance, the People form will offer sources including Baseline Celebrity Bios, Who's Who Biographies, and The Executive Directories.

Just enter your terms in a fill-in-the-blank format, select a date range and specific source titles, and go. By choosing a Guided Search form, as opposed to using a General Search form, you're already halfway to the specific results you need.



OVERVIEW OF GUIDED SEARCH FORM CATEGORIES

News Search

The News form includes a wide variety of sources covering the breadth of general news, business, international, financial and industry information.

Search key Group Sources such as News, All; US Newspapers & Wires; Magazines; and Transcripts. Or search individual titles like The New York Times and the Financial Times.

Company Search

Search for detailed financial and business information, on both public and privately held companies in the U.S. and internationally.

Includes information about corporate management, executive compensation, company function, company history, competitors, products, facility locations, parent / subsidiary structure, and much more.

Industry Search

Use the Industry forms section when researching market share, market trends, or predictions for particular markets or products.

The Industry section includes sources covering advertising, marketing, market research, public relations, sales and consumer attitudes. Search by a specific industry to find targeted results.

Public Records Search

Search within public records to better understand the background of a company or a person.

Research a subject in civil and criminal filings, criminal history records, bankruptcies, liens, and judgments. Determine ownership of a property or the property holdings of person or company. Check to see if a company is in good standing in the state in which it operates.

People Search

Search for specific information on a person, including biographies, executive directories and Who's Who information.

Country Profiles Search

Search for specific information on a country, including country reports and profiles, risk reports and economic and political news.

Legal Search

Search within legal information such as cases, law reviews, statutes and regulations.

GENERAL SEARCH FORMS VS. GUIDED SEARCH FORMS

While there are too many individual Guided Search forms to review all of them in this User Guide, there are several consistent elements that various Search forms have in common as noted on page 8. We have already reviewed the two General Search forms, so you have a pretty good idea of how some features, like selecting sources or choosing a date, can work for you.

There are a few key differences between the **General Search forms** and the **Guided Search forms**:


- General forms allow you to search across multiple content *categories* at the same time, so you can cast your net wide; while Guided forms concentrate on a particular content area, such as News, Company Reports, or Public Records, facilitating more targeted results.
Note: When using a Guided form, don't forget to check for **Related Searches** on the right side of the page. Searching other forms related to the one you've started from may introduce you to sources you were unaware of and help you to develop a more complete answer to your information question.
- General forms ask you to "Enter Search Terms" with no particulars specified; while most Guided forms direct you to enter specific pieces of information, such as a company name, an SIC code, a person's last name, a case name, etc.
- General forms search for your terms anywhere they may appear in the documents searched unless you specify that a particular Document Section should be used. Many Guided forms restrict your terms to specific Document Sections automatically, allowing you to get to the most relevant documents faster.

**SEARCH
ADVISOR
SAYS:**

When a field within a Guided form asks for a specific piece of information, such as an address, make sure that you limit yourself to only the information requested because a field-specific search will likely be conducted behind-the-scenes. If you enter information other than what is asked for you will not retrieve the desired results since that information may not appear in the field searched.

Be on the lookout for an 'Additional Terms' box, which will allow you to search full-text within the source selected. This box will appear on many Guided forms, and in most cases you may enter 'Additional Terms' without filling-in any other field, if so desired.

Guided Search forms keep source selection simple by offering you the most relevant sources in one of three ways:

1. **Source drop-down box** with publications relating to the form that you've chosen. This is the most common way that you will see sources presented within Guided Search forms. This option only permits one source to be selected per search, but the source that is listed at the top *usually* includes all individual titles listed beneath it, automatically. Click the Information Icon () beside any source to check what publications are included in your selection.
2. **No source selection option.** On several Guided Search forms the source is pre-selected for you. For instance, if your subscription includes Market data you will see the RDS Tablebase Search form within the Industry sub-section. When this form is chosen, RDS Tablebase is already listed as your source.
3. **Source select box** including various sources that you can check off (). This method allows you to check off multiple sources to search at the same time.

Now that you know what to expect with Guided Search forms, let's take a closer look at the **News form**, which is one of the most sophisticated of the Guided forms, and which most Nexis users will have access to under their subscription.

NEWS SEARCH FORM

The News form allows you to easily build News searches using Connectors, Document Sections, and index terms.

A Enter Search Terms

Enter up to five rows of search terms, Document Sections, and Connectors.

Note: If only three rows are displayed, you may click [More...](#) to expand to five. If you'd like to reduce the number of rows from five to three, click [Less...](#)

- 1 Type a search term or phrase in the first text box. You may use wildcard characters (*) and truncation (!). See page 22 for more information about these characters.
- 2 Specify where the term should appear using the first drop-down list:

Anywhere in the document - Anywhere in the text

In Headline - In the title of the news article

In Headline & Lead Paragraphs - In the headline and/or lead paragraph

In Headline, Lead Paragraphs & Indexing - In the headline, lead paragraphs, and/or within index terms of a document

In Indexing, Any Reference - Within the index terms of a document and any reference to the terms entered

In Company Indexing - Within the company name field of a document

In Publication Field - Within the publication section of a document

In Byline Field - In the byline or author field of an article

At Least 3 Occurrences - Finds articles where the word/phrase appears 3+ times *in the same record*

At Least 5 Occurrences - Finds articles where the word/phrase appears 5+ times *in the same record*

3 Select a Connector from the second drop-down list to define how the term in *this row* will relate to the term in the *second row*:

And - Terms entered across rows must appear in the article together

Or - At least one of the Terms entered across rows must appear in the article

Within 5 – Terms entered across rows must appear within five words of each other

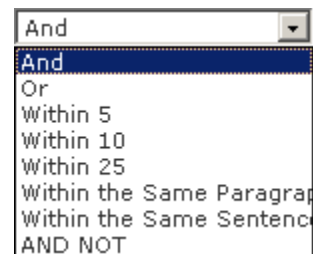
Within 10 - Terms entered across rows must appear within ten words of each other

Within 25 - Terms entered across rows must appear within twenty-five words of each other

Within the Same Paragraph-Terms entered across rows must appear within the same paragraph

Within the Same Sentence - Terms entered across rows must appear within the same sentence

AND NOT – Terms following AND NOT must NOT appear in the article. (Note: This option only appears in the second to last row displayed.)




4 Repeat the first three steps until you have finished entering your terms.

Narrow Search Terms

(Appears only if you are editing a search.) If you entered any narrow search terms in your results, you may edit them in this field.

Edit Search with Document Terms

(Appears only when editing a search.) If you have previously selected major or minor mentioned Index terms in Results Document View, those terms will appear in this box. You may change the Connectors ([AND](#), [OR](#), [AND NOT](#)) by clicking the links, or to delete a term from your search, click the "Remove" () icon.

B Add Index Terms

Select any combination of index terms to add to your search from the Industry, Subject, or Region lists.

- Select up to ten (10) items from any or all checkbox lists.
- Check the **Exclude from Search** box beneath a list to exclude any results that match the index terms you selected in the list.
- Click the [\[-\] Hide](#) link to collapse this section or the [\[+\] Show](#) link to display it.
- If you select some index terms and then choose to hide this section, the index terms you selected will not be used in your search.

For more information about incorporating SmartIndexing into your search using the News form see page 33.

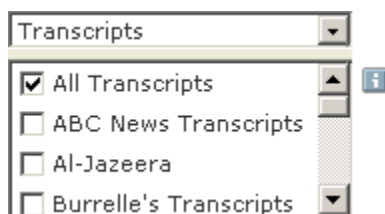
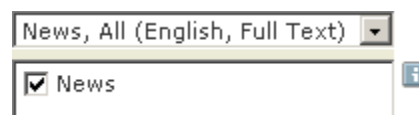
C Select Sources

First, select a source category from the drop-down list. **Then**, select one or more sources from the checklist (if available).

Group Sources

If the source contains too many publications to be individually displayed, you will see a single entry with the group name already checked off.

For instance, the **News, All (English, Full Text)** collection includes over 14,000 sources, so it would be impractical to display them all individually.




Individual Sources

If a Group Source contains a reasonable number of individual titles they will be listed under the group name.

The Group Source will typically include all of the sources listed beneath it. In the example to the left, **All Transcripts** includes the individual transcripts listed below.

You may search the entire collection by keeping the Group Source checked, or you may select particular titles using the checkboxes provided.

Source Information Icon

To learn more about the contents of a source, click the  icon. The document that appears generally explains such things as: coverage/span, available Document Sections, information on data updates, source overview, publisher information, etc.

D Specify Date

You may narrow your search to documents published on a specific day or within the date range you specify. Select a custom date restriction from the Specify Date drop-down list. For more details about date restrictions see page 10.

CHOOSING A SEARCH TECHNIQUE

The Nexis service includes access to three basic search options: Natural Language Searching; Guided Searching; and Searching with Terms and Connectors.

Natural Language Searching allows you to keep things simple. You may enter a question, a statement, or simply a list of words describing the concepts desired. This option most closely resembles searching the open Internet with a general search engine. Though this method is perfect for those with no searching experience, it also works well for power searchers when searching a subject or a content category that's unfamiliar. To understand how this feature functions see the 'How does Natural Language Searching work?' box on page 9.

Guided Searching via the content-specific Search forms captures the precision of advanced search features, like Connectors, Precision Commands, and Document Sections in fill-in-the-blank search templates. Each Guided Search form offers easy-to-use search fields and a pick list of commonly used sources to make research faster.

Terms and Connectors Searching is the most advanced and precise method of searching. When you are well-versed in using Connectors, Precision Commands, Document Sections, and SmartIndexing you will be the most efficient kind of searcher. Terms and Connector Searching is preferred by professional researchers because it allows them to find exactly the answers they need, the way that they need them, fast.

Because the Terms & Connector search method is so sophisticated it warrants thorough discussion. The following pages will walk you through all you need to know. We'll cover the following topics specific to Terms and Connectors Searching:

- Developing a Search with Terms and Connectors
- Defining Words & Phrases
- Using Connectors & Proximity Operators
- Refining with Precision Commands
- Order of Operators
- Searching with Document Sections
- Nesting Search Terms

Note:

Throughout this Guide search commands and connectors, will appear in all uppercase, such as AND, OR, AND NOT, etc. This is for emphasis only; *you do not need to enter your Commands and Connectors in all capital letters when searching*. Similarly, words and phrases that are intended to be found in documents (keywords) will appear in all lowercase, even proper names. This convention had been used in order to distinguish keywords from search processing logic. The system by default is *not* case sensitive.

DEVELOPING A SEARCH WITH TERMS AND CONNECTORS

The first step in a successful search is planning the strategy you will use when you sign-in to Nexis. This means thinking about the keywords and search terms you will use, and the databases that you will select to find the answers you need.

To create a search request with the Nexis service, start with words and phrases that reflect ideas essential to your research. Then include Connectors and other special characters to link the terms and phrases, and to search for word variations. You may also decide to incorporate Precision Commands, indexed terms, and Document Sections to create a more specific search.

To create the best search strategy, follow these basic steps:

1. Identify the topic. Most topics include two to four concepts.

Determine the general subject that you want to research. For example, information about efforts in the fast food industry to use recyclable packaging.

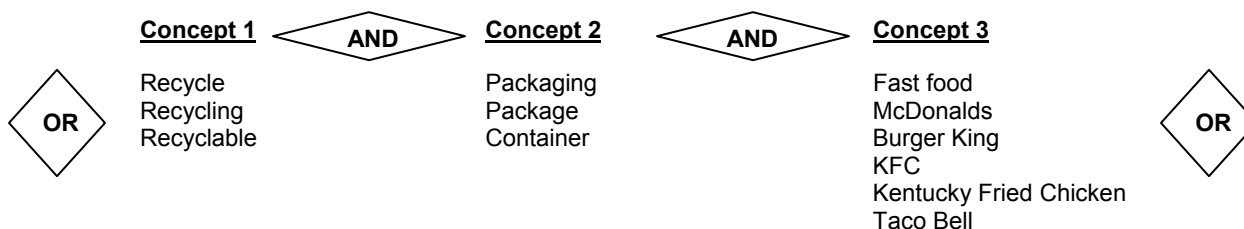
2. Select your Source.

For a topic like recycling in the fast food industry, you might want to begin your search in a news source. The Group Source called 'News, All (English, Full-text)' contains thousands of full-text business, financial, trade, and news publications. For a deeper discussion of source selection, see the 'Selecting Sources' section beginning on page 42.

3. Choose your search terms.

Choose search terms that are specific or closely related to the topic of interest. Ask yourself: 'What words must a document contain in order to be relevant?' For each concept within your topic, think of alternative words, synonyms, and abbreviations that are relevant. Try to avoid terms that are too general.

It might be helpful to map out your strategy using concept blocks:



4. Use truncation and/or wildcards to include word variations.

The truncation (!) character lets you easily combine or eliminate search terms, making your search simpler.

! Finds a root word plus all the terms made by adding letters to the end of the root.

For example, recycl! finds 'recycle,' 'recycling' and 'recyclable.'

5. Link the search terms using Connectors.

Connectors such as OR, AND, W/N, and so on define relationships between your search terms. For example:

recycl! W/10 packag! OR container AND fast food OR mcdonalds OR burger king OR kfc OR kentucky fried chicken OR taco bell

This search would find documents where 'recycle' (or its variants) appears within 10 words of either 'package' (or its variants) or 'container.' In addition, one or more of the following terms must also appear in the same document: 'fast food,' 'McDonalds,' 'Burger King,' 'KFC,' 'Kentucky Fried Chicken,' or 'Taco Bell.'

Note: You may choose to group your concepts using parentheses to help you understand how your search will be processed. Parentheses are not necessary in this example because OR is the first Connector processed by the LexisNexis® system. For more information the Priority of Operators see page 27.

6. Specify date restrictions.

Use date restrictions to narrow your search to documents published on a specific day or within a date range you specify.

DEFINING WORDS & PHRASES

Now that we've reviewed the basic steps of developing a search, let's take a closer look at how terms are processed.

Words

Words are the basic units of a search. A 'word' is a single character or group of characters, alphabetic or numeric, with a space, or a character recognized as a space (such as punctuation), on either side.

Examples:

- McPherson One searchable word
- Mc Pherson Two searchable words
- John D. Rockefeller Three searchable words, with the period operating as a space

These following symbols are generally treated like spaces:

& | \$ | / | + | ' | ? | : | . | , | ' | (|) | -

However, there are a few exceptions concerning the treatment of some of these symbols:

The ampersand (&) – is only treated as a space if there is a character immediately preceding and following it, such as AT&T. However, when one blank space precedes and follows the ampersand (like AT & T) it processes like the Boolean AND Connector (see page 21).

Parentheses - besides acting as a space when searching for a term like 401(K), parentheses also may alter the processing sequence used for Commands and Connectors. Parentheses are also used when searching by Document Section.

Periods, commas, and colons - treated like a space except when part of a word, like 1,000, 5:00, 7.6, .5, I.B.M., I.R.S.

Apostrophes - treated like a space except when part of a word, like O'Brien.

Phrases

Two or more adjacent words are considered a phrase. No quotes are needed to specify a phrase when using the Terms and Connectors search method. Words typed next to each other will automatically be found immediately next to each other in the documents retrieved. The exception can be 'noise words' that may appear in between words in a phrase.

Noise Words

Certain very common words cannot be searched. The list is too extensive to give here, but think of noise words generally as structural words that are used repeatedly in most writing -- the, at, of, his, my, when, is, are and so on. If you are in doubt and are doing a Terms and Connectors search, omit the questionable word and use the W/N Connector instead.

Reserved Words

Reserved words are those which the Nexis service reserves for use as part of search logic and will be processed as such when entered:

and | and not | or | equ | gtr | lss | bef | aft | but not | > | < | =

Singular and Plural Words and Possessive Words

In Terms and Connectors searching, you may use any form of a noun -- singular, plural or possessive. Nexis will automatically pick up the other word forms as long as the word has a regular plural.

Examples:

- book also finds books, book's or books'
- pony also finds ponies, pony's or ponies'

However, the system will not find all word forms for nouns that have irregular plurals. Use universal characters to get all forms of these words, or the OR Connector to include variations.

Examples:

- Wom*n finds woman or women
- Child OR children finds either term

Sometimes, however, the use of singular or plural forms of words will dramatically impact the results of your Terms and Connectors search. There are commands you can use to specifically request only the singular or only the plural form of a word. These specialized commands are discussed on pages 25 and 26.

Capitalization

The system is not case sensitive by default. However, there are commands that can force case sensitivity. These specialized commands are reviewed on pages 24 and 25.

USING CONNECTORS & PROXIMITY OPERATORS

An essential aspect of Terms and Connectors searching is how you define the logical relationships among the terms being searched. Words that link concepts in a search request are called Connectors. Three kinds of logical relationships are defined on Nexis: OR, AND, and AND NOT. These Connectors are also known as Boolean Operators.

In addition to the basic Connectors, Nexis includes several Proximity Operators that specify the relative nearness of search terms to each other. When using Proximity Operators, AND logic is implied: both terms must be present in a given record. In addition, the terms must occur in the same field, or be within a certain proximity of one another.

THE SUPERSTARS

Connector	Function
OR	Links synonyms, alternative forms of expression, acronyms, and so on. Finds either or both search words or phrases in the same document
	OR logic <i>increases</i> the number of records retrieved.
Examples	Documents Retrieved
ibm OR i.b.m. OR international business machines OR big blue takeover OR take over	Finds any of the variations of the company name entered
example OR illustra! OR instance OR sample OR prototype	Finds the term <i>takeover</i> as one word or two words
al qaeda OR al-qa'ida OR al-qa'ida OR al qaida	Finds any of the synonyms listed
	Finds the spelling variations of the organization name

Connector	Function
AND	Links words or phrases that must both appear anywhere in the same document, no matter how close or far apart. The AND does not specify word order.
	AND logic <i>decreases</i> the number of records retrieved since it requires that all search terms be present for retrieval. Each time you add an AND to a search, you are restricting the number of records retrieved.
	Note: The ampersand (&) works like AND when one blank space precedes and follows it.
Examples	Documents Retrieved
doctor AND malpractice	Finds both <i>doctor</i> and <i>malpractice</i> anywhere in the same document
atkins diet AND heart AND protein AND exercise	Requires all words and phrases to appear in the same document
teen! AND dinner table AND overscheduled OR over-scheduled	Finds <i>teen</i> (and its variants) along with the phrase <i>dinner table</i> . In addition, the term <i>overscheduled</i> must appear as either one or two words in the same document

Connector	Function
W/N	Referred to as the 'within' Connector because the words on either side of it must be found <i>within</i> a certain number of words of each other in the same document. The letter 'N' stands for a number of intervening words between 1 and 255. The W/N does not specify word order.
Examples	Documents Retrieved
iraq W/50 war OR conflict	Finds <i>Iraq</i> within fifty or fewer words of either <i>war</i> or <i>conflict</i> , regardless of which word appears first
market W/7 share AND telecom!	Finds <i>market</i> within seven or fewer words of <i>share</i> , in either order. In addition, variants of the word <i>telecommunications</i> must appear in the same document.
george W/3 bush	Finds <i>George</i> within three words of <i>Bush</i> , used to link first and last names, allowing for middle names or initials (which may or may not be used), and last-name-first references.
	Note: For an in-depth look at searching people's names see Appendix A .

THE SUPERSTARS (CONTINUED)

Connector	Function
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AND NOT

The AND NOT Connector is useful for excluding search terms that are known in advance to be irrelevant to the search topic. Use AND NOT carefully, since you may unintentionally eliminate on-point records. For example, the strategy 'energy AND NOT nuclear' would eliminate an article entitled 'Alternatives to Nuclear Energy.'

AND NOT *decreases* the number of records retrieved. Always use this Connector at the end of your search since any terms to the right of it will be eliminated.

Examples	Documents Retrieved
----------	---------------------

michael W/2 jordan AND NOT basketball

Finds records that mention *Michael Jordan*, but not *basketball*

visa AND NOT immigration OR travel visa

Finds the word *Visa*, but neither *immigration* nor the phrase *travel visa* may appear anywhere in the same document

enron AND sarbanes oxley AND NOT worldcom

Enron and *Sarbanes Oxley* must appear in the same document, but *Worldcom* cannot appear in that record

Wildcard	Function
----------	----------



Use the exclamation point to replace an infinite number of letters following the root of a word. You can use only one exclamation point in a word, and it must be at the end of the word root.

Note: Terms that work best with the '!' are those that are unique in their truncated form. For example, if you search for fir! (thinking that you want to find 'fired,' 'firing,' or 'fires'), your results will also include 'first,' 'firm,' and so on. Using the OR Connector between particular variations is more efficient in such cases.

Examples	Documents Retrieved
----------	---------------------

Litigat!

Finds variations of the word litigate, including litigator, litigated, litigation, litigating, and any other words beginning with l-i-t-i-g-a-t.

Acqui!

Finds variations of the word acquire, including acquired, acquiring, acquisition, and any other words beginning with a-c-q-u-i.

Wildcard	Function
----------	----------



Use the asterisk to replace a character in a word. You may use up to 7 asterisks in the same word. You may place them anywhere *except* in the first position.

If multiple asterisks are placed at the end of a word you are allowing up to the number of characters to appear as the number of asterisks entered, but the positions held by asterisks at the end of the word do not have to be filled. *Asterisks used in the middle of a word must be filled.*

Examples	Documents Retrieved
----------	---------------------

Bernst**n

Finds both the ei and ie spelling of the name, in other words, 'Bernstein' or 'Bernstien.'

Wom*n

Finds woman or women

Bank***

Finds any word beginning with b-a-n-k and which has no more than three letters following the root. This example will find bank, banker, and banking, but will not pick up bankrupt or bankruptcy. To find all endings, with no character limitation, use the exclamation point instead.

Property-address (2** Main Street)

This search would locate buildings on Main Street that had building numbers beginning with '2' with up to two additional digits following. Spaces held by the asterisks do not need to be filled when used at the end of a word. This would find 2, 20, 28, 200, 219, 235, 276, 299, etc.

Zip (94*** OR 95***)

This search would restrict your results to zip codes in northern California because this is the only area with zip codes that begin with either 94 or 95.

THE SUPPORTING PLAYERS

Connector	Function
PRE/N	Requires both words to appear in the document, the first word must <i>precede</i> the second by 'N' words. The letter 'N' stands for a number from 1 to 255. Use this Connector when a different word order would change the meaning of the search.
Example	Documents Retrieved
southwest pre/2 air or airlines	Finds either Southwest Air or Southwest Airlines, but not 'United Airline flies to the southwest'

Connector	Function
W/S	Requires both search words or phrases to appear in the same sentence.
Example	Documents Retrieved
Doctor W/s malpractice	Finds <i>doctor</i> in the same sentence as <i>malpractice</i> .

Connector	Function
W/P	Requires both search words or phrases to appear in the same paragraph.
Example	Documents Retrieved
Doctor W/p malpractice	Finds <i>doctor</i> in the same paragraph as <i>malpractice</i> .

Connector	Function
W/SEG	Requires both search words or phrases to appear in the same Document Section, formerly called segments.
Example	Documents Retrieved
Doctor W/SEG malpractice	Finds <i>doctor</i> in the same Document Section as <i>malpractice</i> . Common Document Sections include headline and headline/lead paragraph.

Connector	Function
NOT W/N	The first search word or phrase is required to appear in the document and the second word or phrase may also be there; however, if the second word/phrase is there, it cannot be within N words of the first word/phrase; N represents any number between 1 and 255
NOT W/S	Both words or phrases may appear in the same document; however, they cannot be in the same sentence.
NOT W/P	Both words or phrases may appear in the same document; however, they cannot be in the same paragraph.
NOT W/SEG	Both words or phrases may appear in the same document; however, they cannot be in the same Document Section.

Note: Numeric proximity Connectors (W/N, PRE/N) cannot be combined directly with W/S or W/P. If you do combine a numeric proximity Connector with W/S or W/P, an error message will appear. For example, *retire! W/S benefit PRE/2 plan!* -would result in an error message. You may avoid this conflict by using W/25 to approximate a sentence, and W/50 to approximate a paragraph.

REFINING WITH PRECISION COMMANDS

The Precision Commands are designed to fine tune your search request, offering greater specificity in the results you obtain. Precision Commands forces the Nexis service to read your terms in a particular way, often overriding the default settings built into the search system.

Many times these commands are used when *editing* or *narrowing* a search, since it's often only after an initial review of results that it is apparent that a Precision Command is needed. However, they may certainly be employed from the start if you anticipate their benefit.

Syntax Note: A Precision Command is only applied to the terms that immediately follow it in parentheses. You may type a space after the command and before the open parenthesis if you'd like, or you may leave this space out.

CAPITALIZATION – FORCING CASE SENSITIVITY

As mentioned in the Defining Words & Phrases section, the Nexis service is **not** case sensitive by default. However, there are three commands that force case sensitivity. Because capitalization can play striking role in your search results, these commands are especially powerful.

Notice in the examples below that even when a capitalization command is used that the term in parentheses is still entered in lowercase. In fact, it doesn't matter what case you type your keyword(s) since the system is reading the command itself in order to determine proper capitalization; it is not actually noting capital or lowercase letters that you may have typed.

Command	Function
ALLCAPS	Designates that <i>all letters</i> of your search word(s) must be capitalized and is especially helpful when searching acronyms which <i>in their lowercase form can spell common words</i> .
Example	Documents Retrieved
ALLCAPS (jaws)	Finds the acronym for a screen reader whose full name is 'Job Access with Speech,' but eliminates references to the part of the mouth that holds the teeth, and the movie "Jaws."
ALLCAPS (era)	Finds the acronym which stands for the Equal Rights Amendment rather than the common word 'era' referring to a time period.
ALLCAPS (it)	Finds the acronym IT which stands for Information Technology. In this instance, if the ALLCAPS command wasn't used, the word would be completely ignored since 'it' (the lowercase form of IT) is a noise word.

Note: It is recommended that you cover all of your bases by searching for acronyms with and without periods, plus the spelled-out version of the term. For instance: **ALLCAPS (era) OR e.r.a. OR equal rights amendment**.

A FEW WORDS ABOUT ACRONYMS:

It is a common misconception that the ALLCAPS command is required when searching *any* acronym, but this is not the case. When used unnecessarily you slow down the processing of your search with no benefit.

- Some acronyms in their lowercase forms actually spell common words. For example, the ERA stands for the Equal Rights Amendment, but in its lowercase form this letter combination spells the word 'era,' as in a time period. *This would be a good time to use the ALLCAPS command.* If the ALLCAPS command was not used in this example you would get results on both the ERA and the word 'era' because the system by default is not case sensitive, this would produce extraneous results.
- Some acronyms can be pronounced as words, but do not have meaning beyond what the acronym stands for, even in a lowercase form. An example would be NASA, which is pronounced as a word, but which always refers to the National Aeronautics and Space Administration. In other words, this letter combination, regardless of case, always refers to the same thing. In this instance, the ALLCAPS command is *not* needed, since the letters N-A-S-A, by themselves, are unique and will always retrieve the desired result.
- Similarly, acronyms that are pronounced one letter at a time, such as the NYPD, do not require the use of the ALLCAPS command *unless* the letter combination happens to *spell out a common word* in its lowercase form.
- Finally, you do not need to use the ALLCAPS command when searching for acronyms with periods between the letters. If you were searching for the term Social Insurance Number, you would want to use ALLCAPS when entering SIN (so as not to pick up the word 'sin'), but you would not need to use ALLCAPS when entering S.I.N. because the separation of each letter by a period eliminates the possibility of the common word being retrieved (because the common word 'sin' does not have spaces between each letter).

CAPITALIZATION – FORCING CASE SENSITIVITY (CONTINUED)

Command	Function
CAPS	Requires that <i>at least one letter</i> must be capitalized and is particularly useful when searching proper nouns, which in their lowercase form can equate to common words.
Example	Documents Retrieved
CAPS (visa)	Finds the company named Visa, not the word 'visa' as in student visas, tourist visas, work visas, etc.
CAPS (apple)	Finds the company named Apple, or at least capitalized versions of the word Apple. Ignores references to the fruit.
CAPS (era)	Finds references to the laundry detergent Era, rather than the common word 'era' meaning a time period. Note: This would also pick up the ERA (Equal Rights Amendment) because the CAPS command simply requires <i>at least</i> one letter to be capitalized. So, if looking for the laundry detergent the CAPS command would be appropriate. When looking for the ERA, the ALLCAPS command would be more precise.
Note: You do not need to use the CAPS command with all proper names, just proper names that can be confused with common words in their lowercase form. For example, while the CAPS command is helpful when looking for the computer company Apple, there's no need to use the CAPS command when searching Microsoft. The reason is that the word Microsoft always refers to the computer company...even if the 'M' appeared in lowercase...whereas the word Apple in its lowercase form would refer to a piece of fruit.	

Command	Function
NOCAPS	Denotes that <i>no letters</i> in your search terms can be capitalized, so it ignores acronyms and proper names.
Example	Documents Retrieved
NOCAPS (visa)	Finds references to student visas, tourist visas, work visas, etc., but ignores references to the company Visa, or any other capitalized version of the term.
NOCAPS (era)	If you were looking for the word 'era,' as in a time period, you would be wise to use the NOCAPS command. This will eliminate references to the Equal Rights Amendment and to Era laundry detergent.
Caution: Remember that words will be capitalized at the start of sentences even if they are not proper names or acronyms. For instance, if you searched NOCAPS (visa), you would miss the sentence beginning: Visas are issued to foreign nationals...	

WORD FORMS – SPECIFYING SINGULARS & PLURALS

As mentioned in the Defining Words & Phrases section, the Nexis service will automatically find the singular, plural, or possessive of any noun that you search. The exception is nouns that have irregular plurals, which are not automatically located.

This default is generally beneficial. It allows your search to process faster, and requires you to do less typing. For instance, you *do not* need to type a wildcard (! or *) at the end of every word just to retrieve the plural form of the word.

However, sometimes the system will pick up the plural version of a word when you only want the singular; or the singular version of a word when you only want the plural. In some instances this situation can produce a large number of undesirable documents.

The singular and plural commands allow you to override the system default that finds both word forms automatically. By using these commands you are able to limit your results to a particular word form.

Command	Function
---------	----------

SINGULAR

Finds only the singular or singular possessive form of your search word.

Example	Documents Retrieved
dan or daniel W/2 sing (connor)	Finds documents mentioning Dan or Daniel Connor, but excludes Dan or Daniel Connors with an 's' on the end.
internet W/5 singular (security)	Finds documents that mention issues relating to <i>internet security</i> , as in online security, password protection, encryption, etc. Excludes documents relating to <i>internet securities</i> , as in the trading of stocks over the internet or stocks related to public Internet companies.
CAPS(sing(discover))	Finds the credit card company Discover. While the CAPS command alone assists with locating the proper name, capitalized versions of the word are found in the unwanted plural format, such as when the plural word 'Discovers' appears in a headline or the start of a sentence. By adding the singular command, you add a second degree of specificity.

Note: 'Sing' is an abbreviated way of entering the singular command; sing and singular are interchangeable.

Command	Function
---------	----------

PLURAL

Finds only the plural or plural possessive form of your search word.

Example	Documents Retrieved
steve* W/2 plur (jobs)	Finds documents mentioning Steve or Steven Jobs of Apple Computer. By using the plural version of Jobs, you eliminate phrases like, 'save Steve the extra job of landscaping' and 'If Steve had got his job...'. The CAPS command would have also been useful in this example.
internet W/5 plural (securities)	Finds documents relating to <i>internet securities</i> , as in the trading of stocks over the internet or the stocks of publicly traded Internet companies, like Google. Excludes documents that mention issues relating to <i>internet security</i> , as in online security, password protection, encryption, etc.

Note: 'Plur' is an abbreviated way of entering the plural command; plur and plural are interchangeable.

FREQUENCY SEARCHING – SPECIFYING MULTIPLE MENTIONS OF TERMS

When you enter a term into the Nexis service it will automatically return any document that mentions that term even one time, which allows you to be very comprehensive. Sometimes, however, you may want to find just documents that really feature a term, rather than documents that simply mention a term in passing.

Frequency searching enables you to set the minimum number of times that a search word or phrase must appear within each document in your answer set. In other words, it can help you retrieve only the most relevant documents.

Command	Function
---------	----------

ATLEASTN

Retrieves only those documents that mention your search term at least a certain number of times (N) in the same record. You may use any number between 1 and 255.

Example	Documents Retrieved
ATLEAST10 (microsoft) and executive moves	Finds documents that mention Microsoft at least 10 times in any document retrieved. In addition, the phrase 'executive moves' must be mentioned at least once.
ATL7 (malpractice and medical or surgical)	Requires that malpractice must be mentioned at least 7 times in any document retrieved. In addition, either medical or surgical must also be mentioned at least 7 times.
George W/2 bush and ATLEAST25 (bush)	Finds documents that mention George Bush. In addition, 'Bush' must appear at least 25 times in any document retrieved.

Note: When searching for feature stories on a person apply the frequency command to their last name only since they will not be mentioned by their complete name throughout the document.

Note: 'ATLN' is an abbreviated way of entering the ATLEASTN command; ATLN and ATLEASTN are interchangeable.

ORDER OF OPERATORS

Commands and Connectors have an order of priority. They process in the following order:

- | | |
|---|---------------|
| 1. Word form commands (ALLCAPS, CAPS, PLURAL, SINGULAR, NOCAPS) | 8. NOT W/S |
| 2. Frequency command (ATLEASTN) | 9. W/P |
| 3. OR | 10. NOT W/P |
| 4. W/N | 11. W/SEG |
| 5. PRE/N | 12. NOT W/SEG |
| 6. NOT W/N | 13. AND |
| 7. W/S | 14. AND NOT |

In addition, if two or more of the same Connector are used in a search, they operate left to right.

Example:

Takeover OR take over OR buyout OR buy out OR
merg! OR acqui! AND automobile OR car

The six OR Connectors have priority. Because more than one OR Connector is present, they are processed left to right, with the first OR having the highest priority. After all OR's are operated on, then the AND will be processed.

If two or more of the Connectors that use a number (W/N, PRE/N, NOT W/N) appear in a search, the smaller numbers are operated on first. If the numbers are the same, left-to-right progression applies.

Example:

Market W/5 share AND Donald W/2 trump AND casino
W/5 atlantic city

Because '2' is the smallest number, the W/2 Connector operates first. Then the two W/5 Connectors operate left to right. Finally, the AND Connectors are processed, also left to right.

USING PARENTHESES TO ALTER THE ORDER OF TERM PROCESSING

Sometimes the hierarchy of the Commands and Connectors impacts your search in a negative way and totally changes your search from what you intended. In these instances, use parentheses to rectify the situation. *Parentheses allow you to override the order in which your terms would otherwise be processed.*

Connectors used inside parentheses operate before Connectors used outside parentheses. Connectors inside parentheses follow the standard order as described above.

Example:

Mary W/2 smith OR jane W/2 jones OR William W/2 matthews

The system will first look for smith OR jane and then jones OR William. This is not the intention of the search, which is to find articles on all three individuals independently.

VERSUS

(mary W/2 smith) OR (jane W/2 jones) OR (William W/2
matthews)

The use of parentheses makes the search operate as intended. The parentheses force the names to 'stay together' as independent search units.

SEARCH ADVISOR SAYS:

Many people prefer to use parentheses in their searches so they don't have to fully master the order of operators. Parentheses also help the searcher organize their own thoughts into logical search concepts. So feel free to use parentheses even if they are not technically required.

SEARCHING WITH DOCUMENT SECTIONS

WHAT IS A DOCUMENT SECTION?

Each document in the LexisNexis services is divided into naturally occurring parts, or sections. These sections are searchable and can help you achieve targeted search results.

Note: Document Sections were formerly referred to as *segments* and may still be labeled as such in some places.

WHEN SHOULD YOU USE A DOCUMENT SECTION?


When the topic you are searching is general or widely covered, use sections to narrow your research to the most relevant information. Using sections as part of your search request will limit your results to those documents that have your search terms in a specific part of the documents, such as the headline, byline, or case name. In the Nexis service, some common reasons to use sections include:

- to find news articles written by a particular journalist
- to find news articles where a term appears in the headline or lead paragraph
- to find all companies in a specified industry located in a particular zip code, city, or state
- to find court cases where a person appears as a defendant
- to find pieces of legislation that focuses on a particular topic, such as immigration

HOW CAN YOU IDENTIFY WHAT DOCUMENT SECTIONS ARE AVAILABLE FOR ANY PARTICULAR SEARCH?

Document Sections differ depending on the type of *source* you are searching. For example, you would find a HEADLINE section in a news article, but not in a court case. Similarly, you would find a DEFENDANT field in a U.S. District Court filing, but not in a news article.

You can identify the searchable Document Sections for any particular source in one of three ways:

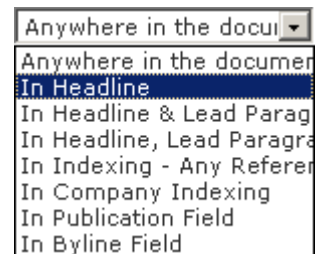
1. By checking the **Source Information** for any publication. The Source Information can be accessed by clicking the Information Icon () next to any source name. You will need to scroll down within the description until you get to the portion labeled 'SEGMENT-DESCRIP.' This part will provide a list of searchable Document Sections for the specific source you are viewing.

Note: When you view a description for a Group Source, such as U.S. Company Reports, the SEGMENT-DESCRIP portion may be excluded. This is because the Document Sections available may vary from source-to-source within for the individual publications that make up the group. If the sections available for searching are inconsistent across Individual Sources contained within a group then the SEGMENT-DESCRIP portion will be excluded from the Source Information record. Use caution not to select a section that is not available in all documents if you intend to find documents from every Individual Source within a Group Source or a customized grouping.

2. By utilizing the '**Search within Document Sections**' tool on the General-Power Search form and on most Legal Search forms. See page 13 for instructions for using this tool.

3. By selecting a Document Section from the **drop-down box** in the News Search form, see right. (A similar drop-down is available on the Industry-RDS Tablebase Search form).

Note: Many of the Guided Search forms incorporate Document Sections behind-the-scenes in order to provide to the most relevant results while keeping to a fill-in-the-blank format. Though the sections aren't always explicitly identified on the Search form itself, you can generally assume that if the form asks you to enter a very specific piece of information, such as a company name, a ticker symbol, an address, or a social security number, that a section-restricted search will be performed.



SEARCH ADVISOR SAYS:

Check out **Appendix B, C, D, and E** for lists of Common Document Sections searchable in News Sources, Financial Sources, Statutes, and Case Law, respectively.

It should be noted that information may not always be available for a particular section. For example, newspapers do not include a byline with every article. In most cases, these empty segments are not displayed.

HOW DO YOU FORMAT YOUR SECTION-SPECIFIC SEARCH?

If you are using the 'Search within Document Sections' tool on the General-Power Search form, or the Legal Search forms, the proper formatting will be automatically entered when you click the [add to search](#) link. See page 13 for more details on using this tool.

Similarly, you do not need to worry about formatting when you select a Document Section from the appropriate drop-down box on the News Search form or the Industry-RDS Tablebase Search form because formatting is inserted behind-the-scenes based on your selection.

SEARCH ADVISOR SAYS: If you already know the name of the Document Section you want to search, you may type it manually into any search box that permits full-text searching; essentially any search box not already section-restricted behind-the-scenes.

Full-text searching is permitted in the following places:

- General-Power Search (as long as Natural Language is not selected);
- General-Easy Search; and
- Any Guided Search form field where a specific piece of data is *not* being requested. These fields are usually labeled 'Additional Terms' or simply 'Enter Search Terms.' Remember that if a field in a Guided Search form asks you for a specific piece of information (company name, last name, ticker, etc.) that it is already performing a section-restricted search behind-the-scenes. If you try to manually enter a section-restricted search in one of these fields you will either get an error message, or just poor results.

FORMATTING A SECTION-RESTRICTED SEARCH FOR MANUAL ENTRY

Some Document Sections are *word searchable* and others are *arithmetically searchable*.

Word searchable format: segment name (search terms)

Syntax Note: Type the segment name, then, enclosed in parentheses, type the words you want to find in that segment. The section-restriction will only be applied to the terms in parentheses, not to any other keywords that may be part of your search string. You may type a space after the section name and before the open parenthesis if you'd like, or you may leave this space out.

Source:	Sample Search:	Documents Retrieved:
News, All (English, Full-text)	hlead (pesticides and fruit or veg!)	Locates news articles that mention 'pesticides' and either fruit or vegetable (or its variants) in either the headline and/or lead paragraph.
Duns Market Identifiers Plus	pri-sic (3699) and zip (94*** or 95***) and minority owned	Produces a list of electrical equipment and supply companies that operate in Northern California that are minority-owned. 'Minority-owned' can appear anywhere in the document since no section is specified.
Congressional Full-text Bills - Current Congress	synopsis (immigration and border security)	Finds bills and resolutions introduced in the current Congress that primarily deal with the subjects of immigration and border security. Both terms must appear in the synopsis section for documents to be retrieved.

Arithmetically searchable operators:	=	is	meaning equal to or is
	>	aft	meaning greater than or after
	<	bef	meaning less than or before

Syntax Note: '=' and 'is' are equivalents; '>' and 'aft' are equivalents; '<' and 'bef' are equivalents. All equivalents may be used interchangeably. You may type a space on either side of the arithmetic symbol or you may leave these spaces out.

Source:	Sample Search:	Documents Retrieved:
CA Deed Transfers	sale-price > 10,000,000 and property-address (san francisco)	Finds all properties located in San Francisco that sold for more than \$10 million.
U.S. Utility Patents	filed-date=2005 and assignee (microsoft)	Locates utility patents filed by Microsoft in the year 2005
OneSource® CorpTech® Company Profiles	Employees>100 and revenues>50,000,000 and revenues<100,000,000	Produces a list of companies with more than 100 employees and revenues between \$50 and \$100 million.

Note: Lists like these are often useful to download in a spreadsheet format. For a list of company/financial sources that offer this capability see **Appendix G**.

NESTING SEARCH TERMS

To apply multiple Precision Commands and/or Document Sections to the same term at the same time, you may “nest” your terms using parentheses. Various scenarios are depicted below:

Document Section + Precision Search Tool

- `headline(allcaps(era))`

Multiple Precision Search Tools

- `atleast5(nocaps(singular(aid)))`

Document Section + Multiple Precision Search Tools

- `hlead(plural(allcaps(aids)))`
- `body(atleast3(caps(visa)))`

Remember that whenever you are using parentheses, you need to have a matching set. In other words, for every open parenthesis, there needs to be a close parenthesis. You may want to carefully count your ‘opens’ and ‘closes’ before processing your search, particularly when nesting a term with multiple simultaneous commands.

LEXISNEXIS SMARTINDEXING TECHNOLOGY™

Do you need help identifying and retrieving targeted news and business information? Are you getting back too many search results? Are you retrieving off-point articles because your search terms are ambiguous? Put LexisNexis SmartIndexing Technology to work for you! With this technology you have access to thousands of pre-defined topics covering subjects, industries, companies, and regions.

WHAT IS LEXISNEXIS SMARTINDEXING TECHNOLOGY?

LexisNexis SmartIndexing Technology is a classification technology that helps researchers overcome information overload by more quickly and efficiently getting them the information they need to do their jobs.

HOW ARE INDEXED TERMS CREATED?

Indexed terms within LexisNexis are created through a unique partnership between technology and human editorial labor. Subject experts and information professionals create controlled vocabularies and algorithmic rules governing their application. These experts then test and analyze their results before a term is released into production. Indexing Terms are automatically and consistently applied to new documents as they are added to the system.

- New terms are put into production each week. The terms are added based on both the need of a particular taxonomy and customer feedback. Periodically all indexed documents are retrospectively updated with the latest vocabularies.
- Name changes do occur on certain topical terms when the indexing team determines that the scope of the term has changed or to provide greater context for the term. New term names will be applied to all documents when those documents are retrospectively updated with the latest vocabularies.

You may download a complete list of our Topical Indexing Terms, by category or alphabetically, as well as a list of newly added terms and term name changes by visiting our LexisNexis SmartIndexing Technology page: <http://www.lexisnexis.com/infopro/smartindexing/>.

WHEN SHOULD INDEXED TERMS BE USED?

LexisNexis SmartIndexing Technology can add value to any search run in the LexisNexis news and business content. Some of the top reasons for using indexed terms include:

1. Easily capture broad concepts in a single term (e.g. airlines, trade agreements, banking & finance agencies, etc.). Rather than string together an endless keyword search, take advantage of all the research that the LexisNexis indexers have done for you!
2. Find companies with common names (e.g. Orange, Saturn, Gap, etc.), or major stories about companies that appear frequently in the news (e.g. Microsoft, IBM, etc.). Searching in the COMPANY section adds context immediately to your search.
3. Research industries. It's very difficult to build a keyword search that captures an entire industry. Take advantage of the 2,500 indexed Industry terms.
4. Add context to a keyword search. Have you ever tried to disambiguate a term like 'discovery' or 'bonds' or 'futures'? Indexed terms can do this work for you.
5. Find things that are hard to represent in a keyword search. Have you ever tried to develop a search to capture things like 'market share,' 'rankings,' 'statistics,' or 'trends'? All of these concepts are SmartIndexing terms. Use them and save yourself valuable time.

WHAT CONTENT IS INDEXED?

LexisNexis SmartIndexing Technology is applied to all news sources and many legislative, company and reference databases. Terms are periodically applied retrospectively in each source. For a complete list of indexed sources see **Appendix F**.

WHAT KIND OF INDEXING IS AVAILABLE?

There are two types of indexing applied to documents in Nexis: *Proper Name Indexing* and *Topical Indexing*.

PROPER NAME INDEXING

LexisNexis indexes proper names including companies and geographic locations. Controlled vocabulary terms for proper names are selected based on a variety of factors as indicated below. Authority lists are continuously updated and maintained by the indexing team.

Company Names (330,000)

- Companies listed on stock exchanges worldwide
- Major private companies worldwide
- Companies in authoritative databases, such as Directory of Corporate Affiliations.
- National and international governments
- Available in English, French and German content

Geographic Locations (950)

- Continents and major world regions
- All countries
- States in the United States, Germany, India and Australia
- Provinces in Canada and China
- Departments and regions in France
- Major cities worldwide
- Available in English, French and German content

TOPICAL INDEXING

The LexisNexis News & Business taxonomies organize thousands of subject and industry terms that can be used to search LexisNexis content. This controlled vocabulary covers a wide range of topics including Banking & Finance, Marketing & Advertising, Computing & Information Technology, Crime, Law Enforcement & Corrections, Trends, Events & Content Types and much more.

Subject Terms (1,200)

- Market trends, business activities and economic indicators
- Government, legal systems and criminal justice
- Education, society and sports
- Editorials, letters and columns
- Available in English, French and German content

Industry Terms (2,500)

- Based on established industry classification standards
 - Classification of Economic Activities in the European Community (NACE)
 - International Standard Industrial Classification (ISIC)
 - Klassifikation der Wirtschaftszweige (WZ)
 - Nomenclature d'activités Française (NAF)
 - North American Industry Classification System (NAICS)
 - Standard Industrial Classification System (SIC)
- Available in English, French and German content

HOW DO I INCORPORATE LEXISNEXIS SMARTINDEXING TECHNOLOGY INTO MY SEARCHES?

There are four ways to incorporate indexed terms into your search:

1. Select index terms from a pick list available in certain Guided Search forms
2. Use the Index Term Lookup Tool
3. Manually enter your indexing search into any search box that permits full-text searching
4. Click on terms at the bottom of a full-text document (that has resulted from a previous search) to run a new search based on selected indexing terms

SELECTING INDEXED TERMS FROM A GUIDED SEARCH FORM

Certain Guided Search forms offer a pick list of indexed terms for you to choose from making it easy to incorporate indexed terms into your search. There are four Search forms that offer this feature, they are: News; Industry-RDS TableBase; Industry-Industry Reports; and Industry-MarkIntel Market Research Reports.

Note: You will only see Search forms that are included in your LexisNexis subscription.

Let's take a look at the indexed terms incorporated into the **News Search form**. Note that the **Add Index Terms** feature can be 'hidden' or 'shown.' Click [\[+\] Show](#) if you do not see the following, but wish to use this feature:

The screenshot shows the 'News Search' interface. At the top, there are search criteria fields with dropdown menus for location and logic, and a 'Search' button. Below this is the 'Add Index Terms' section, which is currently expanded. It features three columns: 'Industry', 'Subject', and 'Region'. Each column contains a list of terms with checkboxes. For example, in the 'Industry' column, 'Aerospace' is checked. In the 'Subject' column, 'Executive Moves' and 'Human Resources' are checked. In the 'Region' column, 'United States' is checked. Below each list is an 'Exclude from Search' checkbox. A red box on the left highlights the 'Add Index Terms' link, and a red arrow points from the main form to the expanded view.

1. Select any combination of index terms to add to your search from the **Industry**, **Subject**, or **Region** lists.
2. Select **up to ten** (10) items from any or all checkbox lists.
3. Click the **Exclude from Search** checkbox beneath a list to exclude any results that match the index terms you selected in the list.
4. Click the Hide link to collapse this section or the Show link to display it again.

Note: If you select some index terms and then choose to hide the index terms section, the index terms you selected will not be used in your search.

USING THE INDEX TERM LOOKUP TOOL

Use this tool to identify index terms and add them to your search.

You may access the Index Term Lookup Tool by:

- Clicking the [Add precision keywords \(indexed terms\) to your search...](#) link that appears beneath the 'Enter Search Terms' box on the General-Power Search form and the Company Profiles Search form; or by
- Clicking the [Find Company Names...](#) link that appears beneath the 'Company Name(s)' search box on the Company Profiles Search form and the Investext Company Reports Search form.

Note: The 'Change Index' drop-down list will not be available when the tool is accessed from the Find Company Names link.

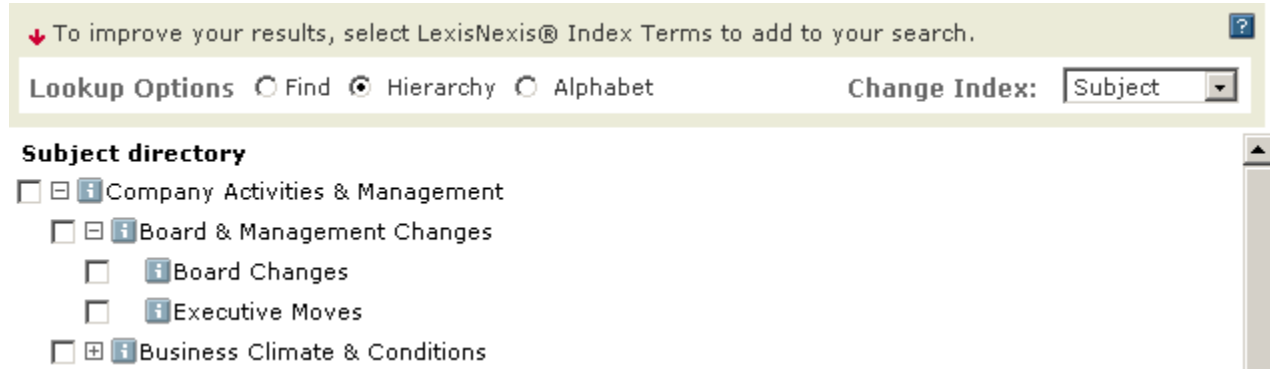
You may either *Search* for an Index Term using the Find feature; or *Browse* for an Index Term using the Hierarchy or Alphabet feature.

To Search for Index Terms use the Find Feature:

The screenshot shows the 'Index Term Lookup Tool' interface. At the top, there is a message: 'To improve your results, select LexisNexis® Index Terms to add to your search.' Below this are 'Lookup Options' with radio buttons for 'Find', 'Hierarchy', and 'Alphabet'. To the right is a 'Change Index:' dropdown menu currently set to 'All terms'. At the bottom, there is a 'Find Terms:' field with a dropdown menu set to 'containing', an empty text input box, and a red 'Find' button.

1. Select an index to search by using the **Change Index** drop-down (All Terms, Company, Industry, Subject, or Geography).
2. Select a search method from the **Find Terms** drop-down list (containing, starting with, or exactly matching).
3. Enter words to search for, and then click **Find**.

To Browse for Index Terms use the Hierarchy or Alphabet Feature:



1. Select an index to search by using the **Change Index** drop-down (Industry, Subject, or Geography).
2. Use the icon to browse deeper into a category and icon to collapse a category. To select another index (Industry, Subject, or Geography), choose a new option in the Change Index drop-down list.

**SEARCH
ADVISOR
SAYS:**

By using the new Indexing Lookup Tool you can launch a search across all English, German and French news content with the English-language index term. A unique search code behind the scenes will map to the native-language index terms in German and French content. Developed by expert indexers in our European offices, German and French indexed terms have the same high quality you rely on for English-language searches.

A SPECIAL NOTE ON COMPANY INDEXING

When searching the Company Index you will notice corporate hierarchies available for many companies as well as industry and geographic information associated with companies. All of this additional metadata will help you identify which company you want to search.

Using the power of indexing, if you search by company name, the Nexis Service can help you find the ultimate parent and show the entire corporate structure, including all company subsidiaries.

↓ To improve your results, select LexisNexis® Index Terms to add to your search. ?

Lookup Options Find Hierarchy Alphabet Change Index:

Find Terms:

Company Name | Ultimate Parent
Company names for: "sara lee"

SARA LEE CORP

SARA LEE CORPORATION
[View Corporate Structure...](#)

SARA LEE DE NV

SARA LEE

SARA LEE

SARA LEE

SARA LEE

View Selected

↓ To improve your results, select LexisNexis® Index Terms to add to your search. ?

Corporate Structure for: SARA LEE CORP - Chicago, IL

Ultimate Parent Including Subsidiaries

SARA LEE CORP - Chicago, IL

- BALL PARK BRANDS - Cincinnati, OH
- BEST KOSHER FOODS CORP - Chicago, IL
- BRYAN FOODS INC - West Point, MS
- CHAMPION ATHLETICWEAR INC. - Winston Salem, NC
- HOST APPAREL INC - New York, NY
- OUTER BANKS SPORTSWEAR - Winston Salem, NC
- PLAYTEX APPAREL, INC - Winston Salem, NC
- SARA LEE SOCK CO - Winston Salem, NC
- SARA LEE UNDERWEAR - Winston Salem, NC
- SARA LEE UNDERWEAR, INC. - Fort Lauderdale, FL
- SWEET SUE KITCHENS - Athens, AL
- TRAIL'S BEST SNACKS - Chandler, MN
- EARTHGRAINS BAKING CO. INC. - Columbus, MS

View Selected

Use the form pictured above to review the corporate structure for the company that you selected. To use this form:

1. Use the and icons to browse the corporate hierarchy. Click the icon to view basic information about a company.
2. Select the companies that you want to add to your search.
3. Click Go Back to return to the results of your original company name search.

Note: If a company name does not have a checkbox next to it, there is no index term for the company.

Ultimate Parent Including Subsidiaries - Select this option to add the parent and all indexed subsidiary companies in this corporate structure in your search.

To Select Terms for your search use the Index Terms Checkboxes:

↓ To improve your results, select LexisNexis® Index Terms to add to your search.

Lookup Options Find Hierarchy Alphabet Change Index: Industry

Industry directory

- Agriculture, Forestry, Fishing & Hunting
- Automotive
- Banking & Finance
 - Bank Failures
 - Banking & Finance Associations
 - Banking & Finance Regulation**
 - Banking Law
 - Securities Law

View Selected

1. Browse the results and select the index terms that match your research topic by checking off the boxes to the left of each term. You may add up to 150 terms that describe companies, industries, subjects, or geographic locations.

Note: If you select a 'parent' index term but not the 'child' index terms beneath it, your search will still find documents that match the child index terms. In the example shown above, by selecting **Banking & Finance Regulation** you will automatically capture both Banking Law and Securities Law (even though they will not be checked).

If you had selected the even broader topic 'Banking & Finance' you would find documents that match *any* of this term's children (not all pictured here). On the other hand, if you select a term that has no children you will only be searching that individual term. So, if you had selected Bank Failures in the example above, you would only find documents that match that single term.

2. Click the Information Icon (i) for a brief description of this index term and a list of related terms.
3. Click the **View Selected** button to review and/or change your selected terms and the Connectors used to add them to your search. The system remembers all of the terms that you selected across all indexes. **Note:** You will also be able to change the Connectors and remove terms after returning to the Search form.
4. Click to return to the Search form. The terms you selected are added to your search.
5. Click **Cancel** to discard any changes you made to your index term selections and return to the Search form.

Selected Index Terms

Once you've selected terms and clicked '**OK – Add to Search,**' you will be returned to the Search form with your selected index terms appearing just beneath the search box available for keyword entry. From here you have **four** options:

1. You may choose to enter keywords to be searched in addition to your selected index terms. This is optional as index terms may be searched independently with no keywords added.
2. You may alter the relationship between your selected terms by changing the Connector that appears between each. The first term must use **AND**, but you can change all others by clicking on the Connector. The options are [OR](#), [AND](#), and [AND NOT](#).

Note: Each Connector relates only to its own term; the other Connectors that precede or follow it have no influence on how it is interpreted. For example, if your terms include 'AND AUTOMOTIVE AND NOT CONSTRUCTION OR INSURANCE,' the OR Connector does not complete a statement started by the preceding AND NOT Connector. The search would return documents that match AUTOMOTIVE or INSURANCE, but not CONSTRUCTION. The order of terms has no impact on how they are interpreted in the search. This is different than other searches you will run which are controlled by the order of operators (see page 27).

Terms and Connectors Natural Language

AND **WOMEN'S CLOTHING**

AND **SALES FIGURES**

OR **SALES PROJECTIONS**

Relevancy: Major terms only

- You may remove any term from your search by clicking the **Remove Term Icon** (✕).
- You may click the checkbox for **'Relevancy: Major terms only.'** If you choose this option, the index term conditions you set (AND, OR, AND NOT) will only match documents that are *strongly* related to the term. For example, if you select this checkbox and your index term is 'AND AUTOMOTIVE,' the system will retrieve documents that are strongly related to the index term AUTOMOTIVE. If your term is 'AND NOT AUTOMOTIVE,' the system will exclude documents that are strongly related to the index term AUTOMOTIVE.

WHAT ARE RELEVANCE SCORES?

Index terms appear on documents together with relevance scores based on criteria such as a term's frequency, weight and location. The relevance scores measure the quantity of discussion in a document on a particular topic by comparing the similarity between index terms and the documents being searched.

By checking **'Relevancy: Major terms only,'** you are indicating that references to your term must be scored at **85% or higher.** If you leave this option un-checked, the system will match documents that have a relevance ranking of 50% or more.

Scores fall in the following ranges:

- 90% - 99% = Major Reference
- 80% - 89% = Strong Passing Reference
- 50% - 79% = Weak Passing Reference

ENTERING YOUR INDEXING SEARCH MANUALLY

You may manually enter your indexing search into any search box that permits full-text searching.

There are **ADVANTAGES** and **DISADVANTAGES** to manually entering your indexing search versus relying on the Index Term Lookup Tool described in the previous section.

ADVANTAGES

- Once you are familiar with a particular Index Term it may be faster to simply type it in rather than looking it up in the Lookup Tool.
- You may apply a different relevancy score to each term you enter. For instance, you could specify that the term 'WOMEN'S FASHION' must be scored at 90% relevancy or higher, while simultaneously requesting that the term 'SALES FIGURES' be required with only a 70% minimum or no minimum at all.

When you use the **'Relevancy: Major terms only'** checkbox that appears once you've added Terms using the Lookup tool, you are forced to apply an 85% relevancy restriction to every term in your search, with the only other option being adding no relevancy threshold at all.

DISADVANTAGES

- You may inadvertently enter the index term incorrectly if you don't use the Lookup Tool. For instance, you may think that the term used to target the hiring, promotion and appointment of people to executive-level positions is called 'Executive Changes,' but in fact it is called 'Executive Moves.'
- The nature of searching with controlled vocabularies is that the term you use must be precise in order to retrieve the desired results.
- Entering relevancy scores manually can be tricky, and certainly requires more typing than if you just check the **'Relevancy: Major terms only'** checkbox that appears after adding terms using the Lookup Tool.
- When you add an Index Term to your search using the Lookup Tool, what you are actually adding is an **indexing code** behind-the-scenes. It is this code that allows you to select a 'parent' term and automatically find documents that match both the parent itself and all of its 'children.' This enables you to search a broad subject, such as 'Banking & Finance,' by simply checking off a single box.

If you were to try to capture the entire 'Banking & Finance' category by manually entering your terms you would literally need to type about 300 terms!

SEARCH ADVISOR SAYS:

- LexisNexis searching features apply to index term searches. Singular and plural forms of words will be retrieved; each word in a phrase is searchable.
- If an index term has an ampersand (&), the search engine will read that as a Boolean AND. To override that, put double quotes around the term or leave out the ampersand altogether. For example: subject("mergers & acquisitions") or subject(mergers acquisitions).
- Searches of indexing fields will include indexing applied by LexisNexis as well as indexing supplied by publishers. LexisNexis SmartIndexing Technology is easy to identify, just look for terms in uppercase followed by relevance scores.
- A search using indexed terms can be combined with a free text search or a search on other Document Sections (hlead, headline, etc.).
- To view the index terms that are tagged on each document, select the **Full with Indexing** viewing format from the View drop-down. If you would like to review the indexing only, without the document text, choose **Custom** from the View drop-down, check the box next to **Terms**, and click **OK – Use Selected Segments**. Viewing the terms can be extremely helpful if you find articles that are on point. Check out the indexing and run a new search using some of the index terms you found!

THE BASICS

Searching with indexed terms is like doing any section-restricted search in the Nexis service. Pick the appropriate section name and insert the index terms in the parentheses: **section name (index terms)**. For more information on Document Section searching see pages 28 and 29.

The following Document Sections are populated with indexed terms:

Proper Names: CITY, COMPANY, COUNTRY, and STATE

Note: The COUNTRY segment includes countries as well as, major world regions (like EASTERN EUROPE) and continents (like EUROPE).

SUBJECT

Topics:

Note: The SUBJECT field contains the index terms found in both the *subject* and *industry* taxonomies, as found in the Index Term Lookup Tool.

Group Sections:

GEOGRAPHIC (searches Country, State and City)

TERMS (searches *all* indexed field)

SAMPLE SCENARIOS

Problem #1

I have no idea how to find stories on new product releases in the pharmaceuticals industry.

Traditional Approach:

hlead (product releas! or new product or latest product or new offering or new model or new brand and pharmaceutical companies or biopharm! companies or drug makers or pharma! industry or biopharm! industry or pharma! manuf! or manuf! W/3 pharm!)

SmartIndexing Search:

terms (new products and pharmaceuticals industry)

Problem #2

I'm looking for stories on legislation related to the environment.

Traditional Approach:

hlead (clean air or antipollution or brownfields or endangered species or environment! or sea pollution or ocean dumping or resource conservation W/3 (act or law or legislation or statute))

SmartIndexing Search:

terms (environmental legislation)

Problem #3

How can I find out the latest trends among Generation Y?

Traditional Approach:

hlead (gen y or generation y or echo boom! or children of the baby boomers and recent trend or style trend or trending or consumer trend or latest trend)

SmartIndexing Search:

subject (trends and generation y)

BEYOND THE BASICS

To add some real power to your indexing-based searches, take advantage of the relevance scores that are tagged with each term. By using relevancy scores, you have greater control over what results are returned. If you are only interested in major references to a particular topic, for example, you can look for documents that are tagged with a 90% relevancy and above. See page 37 for more details about relevancy scoring.

Follow the five rules below to search with relevancy scores.

Rule 1. To use a relevancy score, type the appropriate syntax after the index term. To find major references: Add **9*%** or **#90plus#** to the index term and get anything tagged with 90% and above.

Examples:

subject (trends 9*% and oil gas industry 9*%)

subject (trends #90plus# and oil gas industry #90plus#)

Rule 2. To generate a slightly larger set of documents, combine the 80% and 90% or use one of the following: (8*% or 9*%) or **#80plus#** (to capture everything tagged at 80% and higher) or **#85plus#** (to capture everything tagged at 85% and above).

Examples:

terms ((banking finance pre/2 8*% or 9*%) and executive moves #85plus#)

terms ("polls & surveys" #80plus# and "campaigns & elections" #85plus#)

Rule 3. If you are going to use two or more relevancy scores in your search, make sure to precede those scores by a PRE/2. This ensures that the search engine will read your search request correctly.

Example: terms (rankings pre/2 8*% or 9*% and airlines pre/2 7*% or 8*% or 9*%)

Note: This is the same search: terms (rankings #80plus# and airlines #70plus#)

Rule 4. If you want 2 or more index terms to precede the relevance score, use a PRE/2 so the search engine understands your request.

Examples:

subject (advertising slogans or branding pre/2 9*%)

subject (air quality regulation or toxic torts pre/2 8*% or 9*%)

subject (patents or trademarks pre/2 #85plus#)

Rule 5. When you use a relevancy score, you must use the exact form of the index term. To save yourself the time of looking up the exact form of a company name or city, use the PRE/2 to give yourself leeway.

Example: company (royal dutch pre/2 9*%) and city (houston pre/2 #90plus#)

The full controlled company name is Royal Dutch Petroleum Co. The full controlled city name is Houston, TX, USA. Use a PRE/2 or PRE/3 to be more flexible if you don't know the exact controlled name. You are telling the search engine that you want Royal Dutch to be two or fewer words in front of 9*%.

SEARCHING WITH REGIONS

There are two ways to search for continents or regions with manual searches using LexisNexis SmartIndexing Technology.

First, you can enter a particular region or continent in the COUNTRY segment to find stories that are 'about' that region.

Example: country(africa) and subject("oil & gas exploration")

Like every other indexed term, you can add relevancy scores to these terms as well.

Example: country(europe 9*%) and subject(telecommunications)

Second, if you want to broaden your search and capture stories that discuss every country within a continent or region, use one of the codes below. While the region index terms capture stories that are discussing a particular region, these codes are roll-ups that capture any story that is tagged with a country which makes up a particular continent or region.

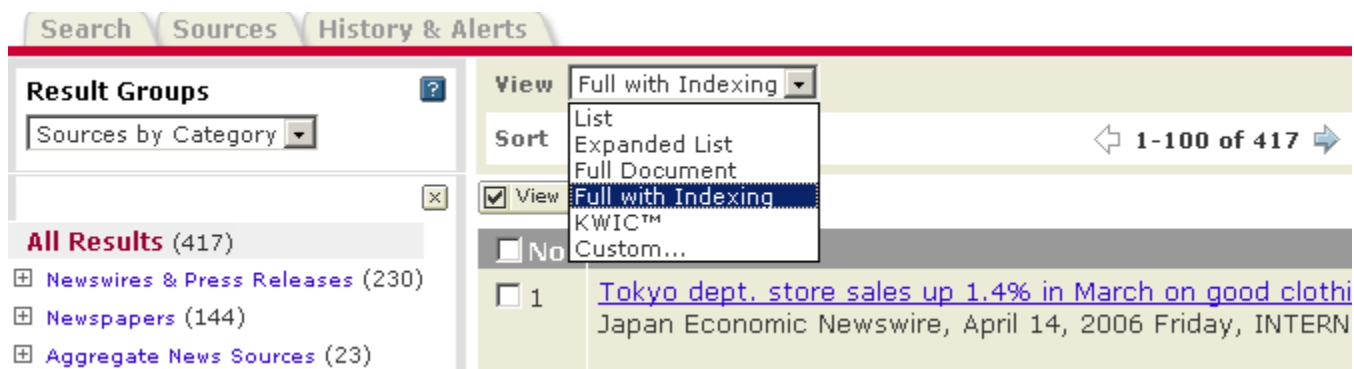
Continent/Region	Code	Continent/Region	Code
Africa	#GT111#	Middle East	#GR132#
Antarctica	#GT114#	Nordic Countries	#GR150#
Asia	#GT113#	North America	#GR120#
Australia Oceania	#GT116#	Northern Europe	#GR167#
Caribbean Islands	#GR114#	South America	#GR122#
Central America	#GR116#	South Asia	#GR134#
Central Europe	#GR154#	South East Asia	#GR138#
Eastern Europe	#GR146#	Southern Europe	#GR169#
Europe	#GT115#	United States	#GC343#
Latin America	#GR118#	Western Europe	#GR152#

To find stories about telecom in Central Europe: **#GR154# and subject(telecom!)**

RUN AN INDEXING SEARCH FROM A FULL-TEXT DOCUMENT

You can refine your search using LexisNexis SmartIndexing Technology terms in most News and Company documents. You may click on indexing terms in a full text document to modify your original search, or you can just use the terms to narrow the current results set.

Whenever you run a search in a source in News or Company sources you will see a section of indexing terms at the bottom of most documents when viewed in **Full with Indexing** format. You can view the Full with Indexing format by selecting this option from the View drop-down at the top-left side of the results page.



**SEARCH
ADVISOR
SAYS:**

From the **Preferences** page (Search and Results tab) you may set your **Document Display** format to **Full with Indexing**. Once this is your default you will see the Full with Indexing format whenever you click on a headline link from either the List or Expanded List View.

FIND DOCUMENTS THAT COVER THE SAME TOPICS AS THE DOCUMENT YOU ARE VIEWING

The 'Find Documents with Similar Topics' section appears at the bottom of full-text documents and displays the Index Terms that are tagged for the record being viewed. You may choose any combination of the Index Terms displayed and then either re-submit your search, adding index terms as search criteria, or narrow your current search results to documents that match the selected terms.

Find Documents with Similar Topics

Below are concepts discussed in this document.
Select terms of interest and either modify your search or narrow the current results set

Company	Subject
<input type="checkbox"/> MARKS & SPENCER GROUP PLC(90%)	<input type="checkbox"/> SALES FIGURES(90%)
<input type="checkbox"/> MARKS & SPENCER PLC(90%)	<input checked="" type="checkbox"/> BUSINESS FORECASTS(89%)
Industry	Minor Terms
<input type="checkbox"/> FASHION & APPAREL(90%)	<input type="checkbox"/> COMPANY PROFITS(78%)
<input type="checkbox"/> RETAILERS(90%)	<input type="checkbox"/> TAKEOVERS(76%)
<input type="checkbox"/> MARKETING CAMPAIGNS(88%)	
Minor Terms	Geography
<input type="checkbox"/> MARKET SHARE(76%)	<input type="checkbox"/> EUROPE(92%)
<input checked="" type="checkbox"/> WOMEN'S CLOTHING(74%)	<input checked="" type="checkbox"/> UNITED KINGDOM(92%)
<input type="checkbox"/> MARKETING & ADVERTISING(73%)	
<input type="checkbox"/> FOOD & BEVERAGE(72%)	
<input type="checkbox"/> INDUSTRY ANALYSTS(71%)	
<input type="checkbox"/> SECURITIES BROKERS(70%)	

OR

[Hide Minor Index Terms](#) | [Hide Relevancy Scores](#) [Clear Selections](#)

To find related documents:

1. Select the index terms that match themes you want to research. If your search already contained index terms, those terms are selected by default.

Show Major and Minor Index Terms – You may show or hide the Minor Index Terms. By default, the form only displays terms that are related to the document by a score of 85% or more.

Show Relevancy Scores – You may show or hide the scores that show how closely each index term is related to the document.

2. Click **Modify Search with Selections** to re-submit your search, adding the index terms you selected. Or, click **Narrow Search with Index Terms** to search your current results for other documents that match the terms you selected.

SEARCH ADVISOR SAYS:	From the Preferences page (Search and Results tab) you may set your Document Indexing settings so that you see All Index Terms, not just Major References (deselect the 'Display only index terms with Major References' box). You may also choose to display relevancy scores with your results by selecting this option.
-----------------------------	--

SELECTING SOURCES

With over 35,000 sources comprising a wide array of authoritative news and business publications, legal documents and public records to choose from, the challenge of finding exactly the piece of information you need starts with selecting the source that will most likely contain that data.

SEARCH ADVISOR SAYS:

Before you begin to think about specific sources, use this short checklist of questions to clearly define your topic and search objective:

Question	Possible Answers
✓ What is the topic of my research?	Government, science, education, society, environment...
✓ What type of publication do I need?	News, cases, public records, legislation, reference...
✓ Do I need to search a single source or multiple sources together?	New York Times, All News, News+Company+People...
✓ What geographic region do I need to cover?	All countries, United States, California, Europe, China...
✓ What language do I need to retrieve?	English, Spanish, French, Dutch, German...
✓ How current does the information need to be?	Same day, current month, current year...
✓ How far back do the records need to go?	A year, three years, five years, ten years...

The answers to these questions will help to narrow your source selection.

CHOOSING THE RIGHT SOURCE: 3 CS TO THINK ABOUT

Sources vary in several important ways. Keep in mind these '3 Cs' when evaluating a source for any given search:

CONTENT

- Subject content: What subject matter does the source cover? (International affairs, healthcare, crime, computers...)
- Source of content: Where does the data come from? (Newspapers, patents, financial filings, court cases...)
- Record content: Do records from the source contain the data elements I need? (Names, addresses, text, numeric data); How can those discrete elements be searched? (e.g., Can you narrow your search by SIC code?)
- Intended audience: What technical level is presented in the source? (In-depth financial analysis for MBAs vs. General interest business stories for consumers)


COVERAGE

- Size of the database: How many records are included? What years are covered? How many companies are reported on?
- Scope of coverage: Is the coverage local, regional, national, international? What types of companies are included? What legal jurisdictions are covered?

CURRENCY

- Frequency: How often is this source published? Does it come out daily, weekly, quarterly, annually?
- Timeliness: What is the lag time between publication and arrival online? (Same day, next day, within one week, within 3 months)

There are three main places to get on-demand Source Information, including details about the 3 Cs:

1. The Sources Tab within Nexis (Source Directory)
2. The Information Icon () that appears beside all sources listed on Search and Results pages
3. The Directory of Online Sources (online / print)


IDENTIFYING SOURCES USING THE SOURCES TAB

Think of that checklist of questions you asked yourself as you were developing your search objective. You've defined your topic, now you need to know what sources cover that topic. The best place to look for guidance on selecting sources is the **Sources Tab** within Nexis, where you may Browse Sources or Find Sources.

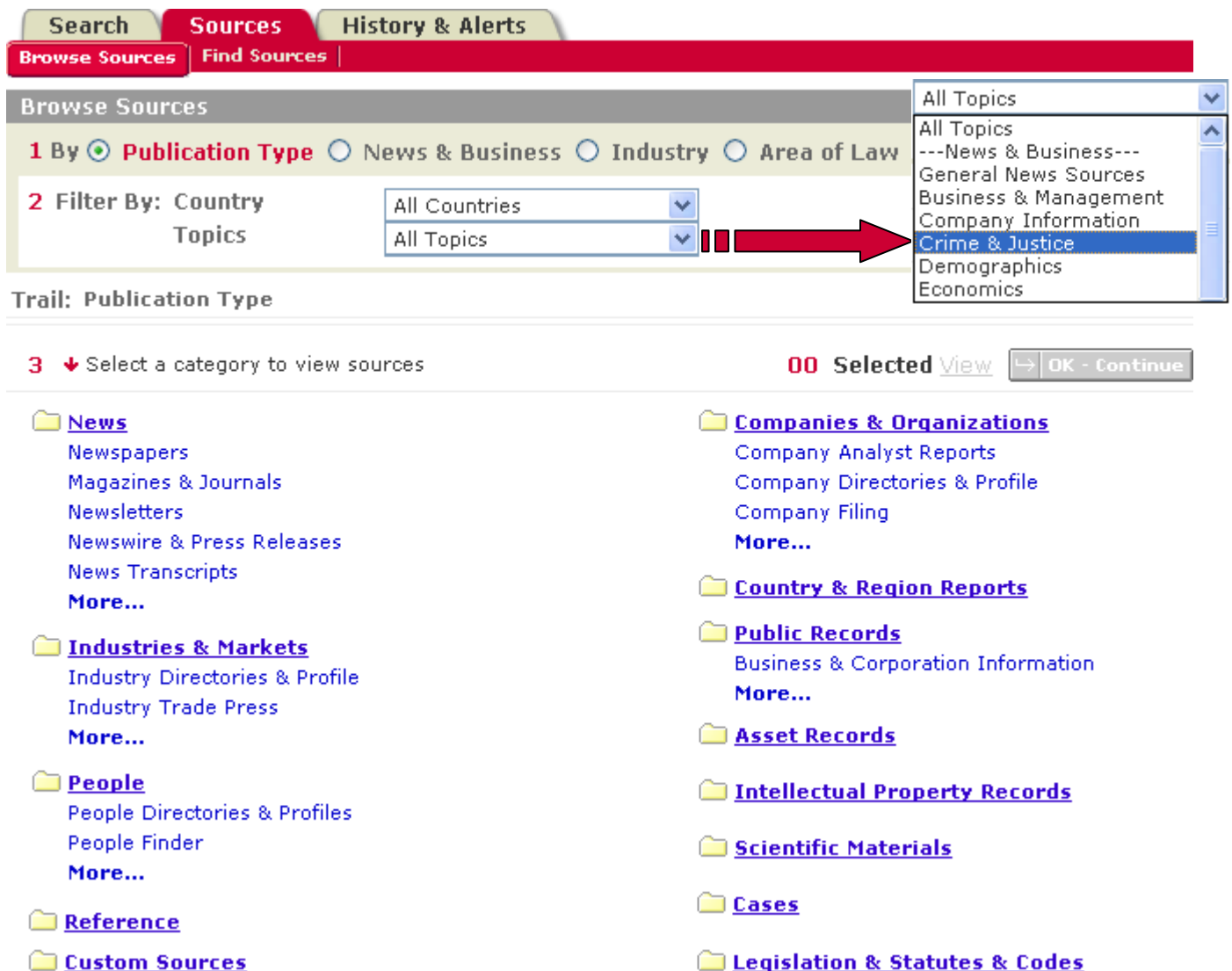
These tools are especially powerful when searching a topic that's unfamiliar to you; when you don't know in advance which sources are relevant. When you use these tools you can feel confident that you are thoroughly covering your subject, and haven't skipped sources just because you hadn't heard of them and didn't realize they were pertinent to your research.

BROWSE SOURCES

Suppose your topic is Crime. Selecting the topic filter 'Crime & Justice' would produce a list of the sources that cover your subject area arranged by publication type. What about geographic region? Just pick a region or country from the list and refine your choices even further.

- Click on a link beside or beneath any folder icon () to see a list of individual sources (e.g. New York Times), group sources (e.g. Major Newspapers), and/or aggregated sources (e.g. ABI/INFORM).

The topic suggestions and filtering options take the guesswork out of finding appropriate sources.



The screenshot displays the 'Sources' tab in the Nexis interface. At the top, there are three main tabs: 'Search', 'Sources', and 'History & Alerts'. Under 'Sources', there are two sub-tabs: 'Browse Sources' and 'Find Sources'. The 'Browse Sources' section is active, showing a '1 By' filter set to 'Publication Type' with radio buttons for 'News & Business', 'Industry', and 'Area of Law'. Below this, a '2 Filter By:' section has 'Country' set to 'All Countries' and 'Topics' set to 'All Topics'. A dropdown menu for 'Topics' is open, showing a list of categories: 'All Topics', '---News & Business---', 'General News Sources', 'Business & Management', 'Company Information', 'Crime & Justice' (highlighted), 'Demographics', and 'Economics'. A red arrow points from the 'All Topics' dropdown to the 'Crime & Justice' option. Below the filters, a 'Trail: Publication Type' is shown. At the bottom, there is a '3 ↓ Select a category to view sources' prompt, a '00 Selected View' button, and an 'OK - Continue' button. The main content area is divided into two columns of source categories, each with a folder icon and a 'More...' link:

- News**
 - Newspapers
 - Magazines & Journals
 - Newsletters
 - Newswire & Press Releases
 - News Transcripts
 - More...
- Industries & Markets**
 - Industry Directories & Profile
 - Industry Trade Press
 - More...
- People**
 - People Directories & Profiles
 - People Finder
 - More...
- Reference**
- Custom Sources**
- Companies & Organizations**
 - Company Analyst Reports
 - Company Directories & Profile
 - Company Filing
 - More...
- Country & Region Reports**
- Public Records**
 - Business & Corporation Information
 - More...
- Asset Records**
- Intellectual Property Records**
- Scientific Materials**
- Cases**
- Legislation & Statutes & Codes**

FIND SOURCES

Find Sources by Keyword: Enter keywords to be searched in the publication name and/or select categories to find matching sources. Categories such as Publication Type, Topic, Region of Coverage, Publication Language and Frequency of Update, may be selected even if you leave the keyword field blank. This is helpful for compiling a list of sources by criteria other than publication name. Note: You may need to click [More Options](#) in order to see all source filter categories.

Find Sources by Alphabet: Browse a list of sources alphabetically; you may further filter by country or region if you wish.

Find Sources by Source code: Select Source Code if you want to find a source using Classic library/file name acronyms.

In the example below, we've pulled a list of News publications for the Banking & Finance Industry in the United States. No keywords were entered. Click [Edit Find](#) anytime you wish to change your source selection parameters.

The screenshot displays the 'Find Sources' interface. At the top, there are tabs for 'Search', 'Sources', and 'History & Alerts'. Under 'Sources', there are sub-tabs for 'Browse Sources' and 'Find Sources'. The 'Find Sources' section is active, showing search options: '1 By Keyword Alphabet Source Code'. Below this, it prompts '2 Enter keywords and/or select categories to find matching sources'. The 'Keyword' field is empty, with a 'Find Sources' button to its right. Under 'Publication Type', 'News' is selected. Under 'Topics', 'Banking & Finance' is selected. Under 'Regions of Coverage', 'United States' is selected. A red arrow points from the 'Find Sources' button to a detailed view of the search results. This view shows the same search criteria and a list of 91 sources, with the first five listed: ABA Banking Journal, American Banker, American Banker-Bond Buyer Newsletters, Bank Systems & Technology, and Bank Technology News.

Find Sources

1 By Keyword Alphabet Source Code

2 Enter keywords and/or select categories to find matching sources

Keyword [Find Sources](#)
e.g.: "New York Times" or Times New York

Publication Type

- All Publication Types
- News
- Companies & Organizations
- Industries & Markets

Topics

News & Business Topics

- Education & Training
- Employment & Resources
- Environment

Industry

- Banking & Finance

Regions of Coverage

- United Kingdom
- United States
- Uruguay
- Uzbekistan

[Hide Options](#)

Find Sources

By Keyword Alphabet Source Code

Keyword [Edit Find](#)
e.g.: "New York Times" or Times New York

Publication Type: News
Topics: All Legal Topics;All News & Business Topics;Banking & Fin...
Region of Coverage: United States
Publication Languages: All Languages
Frequency of Update: All Frequencies

1 Filter: Pricing All Subscribed Sources 1-50 of 91 Sources

2 Select sources below to search

- ABA Banking Journal
- American Banker
- American Banker-Bond Buyer Newsletters
- Bank Systems & Technology
- Bank Technology News

IDENTIFYING SOURCES USING INFORMATION ICONS







Information Icons are displayed in various spots within the Nexis service (see key below). Clicking the Information Icon allows you to delve deeper by revealing specific details about a source. For some sources, the source name provides a good indication of its subject content (e.g., Business News Publications), but other sources have names that may be unfamiliar (e.g., RDS Tablebase). The Source Information for any source can tell you about its Content, Coverage, and Currency, plus more.

As your evaluating a source, you may ask:

- What kind of information will I find in this source?
- Where is this data coming from?
- What does a typical record look like in this database?
- What Document Sections can I search in the source?
- How current is the information?
- How far back do the records go?

All of these questions can be answered by reviewing the Source Information for a publication. You can access the Source Information by clicking on any Information Icon. These icons can appear in a variety of formats depending on where you are looking in the system and what type of source the description is detailing. Here's a key to Information Icons:

KEY TO INFORMATION ICONS

-  Click this icon to see information about various kinds of sources. This icon appears on Search, Results, History and Alerts pages.
-  Click icon to view *single source* information. This Icon appears within the Source Directory (Sources Tab).
-  Click icon to view *Group Source* information. This Icon appears within the Source Directory (Sources Tab).
-  Click icon to view *aggregate source* information. This Icon appears within the Source Directory (Sources Tab).
-  Click icon to view *research options* for the source. This Icon appears within the Source Directory (Sources Tab).
-  Click icon to view *gateway source* information. This Icon appears within the Source Directory (Sources Tab).

Use the Source Information to find out if a source has the options and coverage you need. Some sample considerations:

- If you need to create a list of companies that fit a certain criteria, make sure that there are fields for what you need.
For example: Can the source be searched by revenue? By number of employees? Can you limit your results to headquarters locations? Are members of the Board of Directors listed on the records?
- If you want to have complete text for relevant articles—not just abstracts or summaries—check to make certain that the records include full text.
- If you need to locate very recent stories, check the source frequency and update-schedule within the Source Information to verify the timeliness of the data.
- If you are searching for criminal records on an individual, check to make sure the state and county where he/she resides are covered by the source you plan to search.
- If you are looking to see if a company has ever gone bankrupt, check the date coverage to make sure you know how far back your search can go.

Source descriptions usually include the following information:

Name of the source	Content Summary/Source Information
Coverage dates	Publisher information
Frequency of publication	Segment descriptions (a/k/a/ Document Sections)
Update schedule	Information about any special characters or fields
Hierarchical location within the Source Directory	Sample document

IDENTIFYING SOURCES USING THE DIRECTORY OF ONLINE SOURCES

The Searchable Directory of Online Sources, also called the Source Locator, is another spot to check for sources. It is not, however, a place where you can perform searches. Similar to the Browse/Find tools in the Sources Tab within the Nexis service, the Source Locator allows you to see what publications are available through LexisNexis, and includes some Source Information details, such as coverage, frequency, availability, and data format.

You may visit the Source Locator Web site by clicking the [Searchable Directory of Online Sources](#) link that appears in the Related Links section on the right side of either of the General Search forms (Power Search or Easy Search). Alternatively, you may go to www.nexis.com/sources.

SEARCHABLE DIRECTORY OF ONLINE SOURCES

To the right is the form that appears at the Source Locator Web site.

While not as convenient as the Sources Tab, since you can't select sources and run searches, the Source Locator has some unique features that make it handy in particular circumstances.

For instance, you may use the Source Locator to search by keyword in the *Description* field of the source documents, whereas the Find Sources tool only permits keyword searches of the Publication Name. Searching the Description enables you to locate sources that are *about* a subject even when the topic is not reflected in the publication's title.

You may also search the Publisher field to generate a complete list of all sources available in LexisNexis that are produced by a particular publisher.

Furthermore, you may search by a library name alone, or a file name alone, whereas the Sources Tab within Nexis requires a library/file combination. This is helpful when you want to see a list of all sources included within a particular library, such as INCORP®, BUSFIN, ASSETS, etc.

This feature is also useful if you can only remember the file name of the source you want to search (e.g. ALLBIZ), but need to know the hierarchical name of the source to find it in the Source Directory.

The screenshot shows a search form with the following fields and options:

- TOPIC: All (dropdown)
- TYPE: All (dropdown)
- PUBLICATION NAME: (text input)
- PUBLISHER/PROVIDER: (text input)
- DESCRIPTION: (text input)
- GEOGRAPHY: All (dropdown)
- LANGUAGE: All (dropdown)
- FREQUENCY: All (dropdown)
- AVAILABILITY: All (dropdown)
- DATA FORMAT: All (dropdown)
- LEXISNEXIS LIBRARY: (text input)
- LEXISNEXIS INDIVIDUAL FILE: (text input)
- Display Individual Sources (radio button, selected)
- Display Individual and Group Sources (radio button)
- Submit (button)
- Reset (button)

Perhaps the most compelling reason to visit the Source Locator is that you can **download lists of sources as PDF documents**.

You can generate a PDF on-the-fly based on criteria that you've entered, or you may download one of the **'Source Lists by Topic'** already prepared and available via category drop-downs (not pictured).

IMPORTANT NOTE:

A **significant drawback** to using the Source Locator Web site vs. the Sources Tab within Nexis is that the Source Locator is **not** specific to your LexisNexis agreement. This means that you may see sources displayed in the Source Locator that you do not have access to. The Sources Tab within the Nexis service **is** based on your agreement with LexisNexis, so you will only see materials that you can search.


The **print version** of the Directory of Online Sources is still available. It can be browsed alphabetically by source name or by library/file name. Because this book is only published annually, it is never as current as the online Source Locator or the Sources Tab.







SELECTING A SOURCE TO SEARCH

Once you've identified the best sources for your information needs, there are various ways to select them for your search.

SELECTING SOURCES USING CONTENT CATEGORIES

If your search plan involves searching multiple sources across broad content categories, you may easily accomplish this mission using Easy Search or Power Search. Both of these General Search forms offer this feature.


Simply select the major categories of sources within which you would like to search. The source categories are briefly described below, but for more detail click the  next to any source name while signed-in to the Nexis service.

<input checked="" type="checkbox"/>  News	Searches all news sources and goes back 2 years.	<input checked="" type="checkbox"/>  People	Contains biographical reference sources, such as Who's Who, and directories on people.
<input checked="" type="checkbox"/>  Company	Combines key sources of profiles and reports on the world's <i>major</i> public and private companies.	<input checked="" type="checkbox"/>  Countries	Includes forecasts, profiles, and risk reports for various countries.
<input checked="" type="checkbox"/>  Industry	Combines all sources of industry and market reports, except Investext®.	<input checked="" type="checkbox"/>  Legal	Searches Federal & State case law, plus law reviews and American Law Reports.

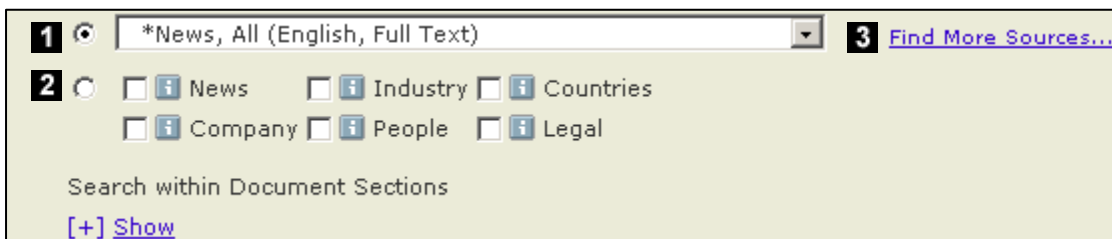
SELECTING SOURCES USING GUIDED SEARCH FORMS

With Guided Search forms, as long as you know the kind of publication you are looking for, and choose the appropriate form (News, Company, Industry, People, etc.); you are likely to find the sources you need.

Guided Search forms keep source selection simple by offering you the most relevant sources in one of three ways:

1. **Source drop-down box** with publications relating to the form that you've chosen. This is the most common way that you will see sources presented within Guided Search forms. This option only permits one source to be selected per search, but the source that is listed at the top *usually* includes all individual titles listed beneath it, automatically. Click the Information Icon () beside any source to check what publications are included in your selection.
2. **No source selection option.** On several Guided Search forms the source is pre-selected for you. For instance, if your subscription includes Market data you will see the RDS Tablebase Search form within the Industry Search sub-section. When this form is chosen, RDS Tablebase is already listed as your source.
3. **Source select box** including various sources that you can check off (). This method allows you to check off multiple sources to search at the same time.

SELECTING SOURCES USING POWER SEARCH



The screenshot shows a search interface with a search box containing the query '*News, All (English, Full Text)'. To the right of the search box is a button labeled 'Find More Sources...'. Below the search box, there are several checkboxes for selecting source categories: News, Industry, Countries, Company, People, and Legal. Below these checkboxes, there is a section titled 'Search within Document Sections' with a button labeled '[+] Show'.

Within the Power Search form you have three options for choosing sources to search:

- 1 You may select a Favorite Source or a Recently Used Source right from the Select Sources drop-down box. This area can hold up to 50 sources.

- Favorite Sources will be identified by an asterisk (*).
- Sources that you have combined together will be indicated with a plus sign (+).
- Click [>Edit This List](#) in order to retain a recent source as a favorite; rename or edit your sources; or remove a source from the most recent sources list. When you are finished, click Done.

- 2 Or, you may check-off major categories of sources, as discussed on the previous page.
- 3 Alternatively, click the [Find More Sources...](#) link or the **Sources Tab** (above the form) to access the complete **Source Directory**. You may use the Source Directory to Browse Sources or Find Sources as described on pages 43 and 44.

CHOOSING SOURCES FROM THE SOURCE DIRECTORY

We've already discussed how the Source Directory can assist you with identifying the right database and how it can provide important information about the sources you plan to search. Now let's finish that topic by looking at the flexibility the Source Directory offers you to select sources; to combine sources; to give custom names to your grouping of sources; and to save sources as favorites.

Selecting sources is easy. Once you've identified the sources you want to search using the Browse and/or the Find tools, just click on the name of the source or check off the box to the left of the source name. You may select up to 200 sources to combine. You can even combine sources found on different pages within the Source Directory; the tool will remember your selections across pages.

1 Filter Pricing: All Subscribed Sources

2 Select sources below to search

- Homeland Defense Watch**
- Aviations Week's Homeland Security & Defense
- Inside the Pentagon**
- Government Publications & Documents
Contains: [Help me search these](#)
Department of Homeland Security Documents
White House Press Releases
- Heritage Foundation Reports

02 Selected View **OK - Continue**

Name Selected Sources: My Homeland Sec Pubs Save as a favorite

Click View if you want to review all of your selections before returning to the search page. This step is optional.

Total number of sources selected across all source pages reviewed

Giving your custom grouping a name, helps you remember its significance to you.

Save sources that you use regularly as favorites so that you may access them with one click from the Power Search source drop-down. This will save you time and ensure consistency in your searches.

When you are finished making your selections, click the **OK - Continue** button.

You will be returned to the General Power Search form with your selections appearing in the Selected Sources drop-down. If you gave your source a custom name, the name you entered will appear in the drop-down window. If you added your selection as a 'favorite' it will remain in this drop-down unless you delete it.

WORKING WITH RESULTS

The Results page includes features to help you get the most out of your search results. Regardless of which research tool you used to conduct your search, the results page will present a consistent view of the documents retrieved. A variety of tasks can be performed from the Results page. For example, you may:

- Make your results more specific with the Narrow Search feature
- Quickly browse your documents using 'hit-to-hit' navigation
- Sort your results by source category, publication name, or various index groupings
- Tag specific records to display, print, Email or download
- Save the search that produced the results for future use or save as an Alert

OVERVIEW OF RESULTS PAGE FEATURES

The screenshot shows a search results page with the following features highlighted by callout letters:

- A**: Breadcrumb trail: General Search - News, All (Engli... > (lexisnexis or lexis nexis) (444) > atl3(body(lexisnexis or lexis nex... (14)
- B**: View List by Result Groups: Sources by Category dropdown
- C**: View by Selected Format: View dropdown menu (Expanded List selected)
- D**: Narrow Search: Narrow Search input field and Go button
- E**: Sort: Sort dropdown menu (Publication Date selected)
- F**: Results List Navigation: 1-14 of 14 navigation buttons
- G**: Next Steps: Next Steps dropdown menu (Edit Search selected) and Go button
- H**: View Tagged/View All Results: View Tagged checkbox
- I**: Alert & Delivery Options: Create Alert button and icons for print, email, and save
- J**: Headline Linking: FAST & LexisNexis: taxonomy team-up; Industry Watch; Brief article
- K**: 'Jump-To' Linking: LexisNexis Group Alliances and partnerships

The results list shows two items:

- 1**: [FAST & LexisNexis: taxonomy team-up; Industry Watch; Brief article](#)
KMWorld, March 1, 2006, Pg. 34(1), 173 words
... a deal that provides [LexisNexis Taxonomy Solutions \(lexisnexis.com/taxonomy\)](#)
... queries, says FAST. [LexisNexis](#) has a comprehensive collection of ...
[LEXISNEXIS GROUP \(93%\)](#)
... ASA Alliances and partnerships **K** [LexisNexis Group Alliances and partnerships](#)
- 2**: [COLLABORATIONS: Health Net extends electronic billing relationship with LexisNexis](#)
Healthcare Mergers, Acquisitions & Ventures Week, February 25, 2006
words
[LexisNexis Examen, Inc.](#), announced that ...
... spend management products from [LexisNexis Examen](#), allows Health ...
... Net has continued their relationship with [LexisNexis Examen](#)," said Kipp ...
... chief operating officer of [LexisNexis Examen](#). "We believe our e- ...

- | | | |
|---------------------------|---------------------------------------|-----------------------------------|
| A Breadcrumb Trail | B View List by Result Groups | C View by Selected Format |
| D Narrow Search | E Sort | F Results List Navigation |
| G Next Steps | H View Tagged/View All Results | I Alert & Delivery Options |
| J Headline Linking | K 'Jump-To' Linking | |

DETAILS ABOUT EACH OF THESE FEATURES APPEAR ON THE EIGHT PAGES THAT FOLLOW.

Tip: You may want to flag this page so that you can flip back to it more easily.

IN-DEPTH LOOK AT RESULTS PAGE FEATURES

Now that you've seen an overview of the features that you'll find on the Results page, let's take a closer look at each one.

A Breadcrumb Trail

The source and terms for your search are displayed in a 'trail' in the upper left of the Results page. The trail shows the path you took to arrive at your results. You may click on a source name or Search form name in the trail to return to the Search form where you ran the search, or click on search terms to return to the results of that search.

For example, the following trail shows a search on Nexis from the Genera Power Search form. The source searched was News, All (English, Full text). The original search found 444 items, so the user narrowed the search further by requiring the company name to appear at least three times in the body section of the article. The narrowed set of results includes 14 documents.

[General Search - News, All \(Engli...](#) ⓘ > [\(lexisnexis or lexis nexis\) \(444\)](#) > [at13\(body\(lexisnexis or lexis nex... \(14\)](#)

If you are viewing the Narrow Search results, click the original search [(lexisnexis or lexis nexis) (444)] in the trail to return to the original search results. Or click the Search form name (General Search - News, All) to return to the form where you ran your search.

You may click the Source Information icon ⓘ for details about the source, or you may click the farthest left link in the trail to return to your starting page.

B View List by Result Groups

(Available from List and Expanded List Views only.) You may use the Result Groups form to filter your results to a specific group of documents. For example, you may want to view only a specific source type (such as Newspapers or Magazines) or only documents from a specific indexing category (Subject, Industry, Company, or Geography). The groups available vary depending on the content of your search results. The Result Groups form lists the available groups for your results and includes the number of documents in each.

Note: You will be able to take advantage of the power of LexisNexis SmartIndexing Technology via this Results classification feature even if your search did not incorporate indexed terms. This functionality helps you analyze your data sets more quickly.

To view a specific group of documents in your results, select a group from the Result Groups drop-down.

Result Groups

Sources by Category ▾

Sources by Category

- Publication Name
- Subject
- Industry
- Company
- Geography
- Language
-
- Close this Pane

In the Result Group display, see a list of the titles included in a category by clicking the plus ⊕ sign beside a category or sub-category. Use the minus ⊖ sign to close categories.

Click the category name to view that list in the results page to the right.

All Results (14)

- ⊖ Magazines & Journals (6)
 - Law Technology News (5)
 - Information World Review (1)
- ⊕ Legal News (5)
- ⊕ Aggregate News Sources (3)
- ⊕ Industry Trade Press (3)
- ⊕ Newswires & Press Releases (3)
- ⊕ Newsletters (1)
- ⊖ Newspapers (1)
 - South China Morning Post (1)
- ⊕ Scientific Materials (1)

C View by Selected Format

You may look at your search results in several different View formats, available through the View drop-down list on the Results page: List, Expanded List, Full Document, Full with Indexing. Each View format displays a different level of detail.

List

Displays basic information, in a numbered list, about the documents your search found. Information will vary depending on the source, but generally includes the document title, source name, and publication date. Click one of the result links to view the full text of the document. Click the checkbox next to a result to tag the document for viewing or delivery.

Expanded List

View Expanded List ▾

- List
- Expanded List
- Full Document
- Full with Indexing
- KWIC™
- Custom...

Shows the same information as List View for each document; plus a display of your keyword hits with about four words of text on either side of each. This small window into your article often provides enough keyword-context for you to determine if you'd like to open the document in full. Click one of the result links to view the full text of the document. Click the checkbox next to a result to tag the document for viewing or delivery.

Full Document

Displays the full text of the documents your search found. Your search words will be **bolded in red text** to make it easier to spot your 'hits.' The following features are available in Full Document View:

Tag Checkbox Click the checkbox next to the title to tag the document for delivery.

Hit-to-Hit Navigation The number of search terms ('hits') in the document is displayed in the lower right pane beneath the full text of your document. Click the arrow buttons to move quickly from search term to search term in the document.

In the small screen capture below, you would be looking at a document that contained 7 references to your search words, 7 hits. You would be viewing hit 2 of 7 and could navigate forwards and backwards to view other hits in the document. This feature lets you jump from one of your terms to the next very quickly, especially helpful when viewing long documents where several intervening pages may appear between one hit and the next.



- Click to view the first search term in the document.
- Click to view the previous search term in the document.
- Click to view the next search term in the document.
- Click to view the last search term in the document.

Document-to-Document Navigation At the top of the page, click the icons to go to the previous (←) and next (→) document.

Full with Indexing

The Full with Indexing View offers the same functionality described above for the Full Document View. In addition, at the bottom of each document will be a display of the indexed terms that are assigned to the record being viewed (providing your search was in an indexed source). A 'Find Documents with Similar Topics' section appears at the bottom of most documents, which allows you to narrow your current results or modify your original search using Index Terms displayed. For more information about using this feature see page 40.

KWIC™

The 'Keywords in Context' View displays each document individually with your search terms highlighted and surrounded by a window of about 25 words of text. This option is not available for all sources.

Custom

The Custom option allows you to specify the Document Sections that you want to view.

When you select Custom for the first time after retrieving a new set of results, the system prompts you for the Document Sections that you want to include in your view. After you have created a Custom View, you can change it by clicking the 'Modify' link that appears next to the View drop-down list.

Note: The Custom View that you create is retained if you perform a narrow search or 'more like this' search, or if you deliver documents from the current results set. However, the Custom View will be reset after your next search.

The Custom option may not be available, depending on the sources included in your search.

Select segments to display in document:

Mandatory Segments: (Cannot be customized)

CORRECTION	PUB
CORRECTION-DATE	PUBLICATION
DATE	
HEADLINE	
IAC-ACC-NO	

All Available Custom Segments: [Select All](#) | [Clear All](#)

<input type="checkbox"/> INDUSTRY	<input type="checkbox"/> PRODUCT	<input type="checkbox"/> SUMMARY
<input type="checkbox"/> INDUSTRY-CODE	<input type="checkbox"/> PUB-AUDIENCE	<input checked="" type="checkbox"/> TERMS
<input type="checkbox"/> LANGUAGE	<input type="checkbox"/> PUB-TYPE	<input type="checkbox"/> TICKER
<input checked="" type="checkbox"/> LEAD	<input type="checkbox"/> SECTION	<input type="checkbox"/> TYPE
<input type="checkbox"/> LENGTH	<input type="checkbox"/> SIC	<input type="checkbox"/> WORK-NAME
<input type="checkbox"/> LOAD-DATE	<input type="checkbox"/> SLOGAN	
<input type="checkbox"/> NAICS	<input type="checkbox"/> SPECIAL-FEATURE	
<input type="checkbox"/> ORGANIZATION	<input type="checkbox"/> SPOKESPERSON	
<input type="checkbox"/> PAGE	<input type="checkbox"/> STATE	

*Available across all documents within this source.

SEARCH ADVISOR SAYS:

If you like to see your **keywords in context** within a list view, select **Expanded List** as your default Results format. Just select this option from the [Preferences](#) page, Search and Results tab.

General Search and Results

Displaying Search Results

Results Format

D Narrow Search

While viewing the results from your initial search, do the following to narrow the results:

1. In the Narrow Search box, enter a search using Terms and Connectors that represents a specific topic within the current results. See pages 19-30 for information about searching with Terms and Connectors.

A text input field labeled "Narrow Search" with a "Go" button to its right.

Note: Your narrowed search needs to use the Terms and Connectors style of searching even if your original search was performed using Natural Language technology. Also, if you are viewing a specific results group, the narrow search will run on the full results list, not just the group you are currently viewing.

2. Click the Go button to run the narrow search.
3. Review the new results. If you need to narrow them further, repeat the previous steps. You can continue to narrow the results as many times as necessary.

Note: The Breadcrumb Trail at the top of the Results page includes your narrowed searches. You can click on any narrow search in the trail to return to the results of that search.

Changing Your Narrowed Search

If you narrowed your search too much, you want to change your research strategy, or you misspelled a word, you may run another narrow search on your original results. To do that:

1. Click the Results tab at the top of the Results form.
2. The page refreshes with the results from your original search.
3. Enter your new narrowed search in the Narrow Search box on the Results form and click the Go button.

Returning to Your Original Search Results

To return to your original search results display from any Narrow Search, click the **Results** tab at the top of the Results form. If you were using the Result Groups form in the List or Expanded List View prior to the narrow search, clicking the Results tab also takes you back to your original search results.

E Sort

Sorting Search Results

(Available from List and Expanded List Views only.) To make results easier to review, you may want to change the order in which your results are displayed according to the type of information you are looking for.

To change the order, select a sort format from the Sort drop-down list on the Results form. Sort options vary according to the type of documents in your results, but may include Publication Date and Relevance, among others.


A dropdown menu labeled "Sort" with "Publication Date" selected. Other visible options are "Publication Date" and "Relevance".

Note: If you have already tagged items for viewing or delivery, sorting will clear the tagged checkboxes.

F Results List Navigation

At the top of the results page, click these buttons to go to the previous and next pages of your results.

 Click to view the previous list of documents.

 Click to view the next list of documents.

Use the following navigation buttons at the bottom of the Results page to move quickly through your results list. The buttons do not appear if your search retrieves only one document or one page of results.

 Click to view the first page of your results.

 Click to view the previous page of your results.

 Click to view the last page of your results.

 Click to view the next page of your results.

Note: Numbers representing the number of pages in your results list appear at the bottom of each page of results. The numbers are links that you may use to move to a specific results list page.

SEARCH ADVISOR SAYS:

From the [Preferences](#) page, Search and Results tab, select **100** from the Results Per Page drop-down. This will enable you to review long lists of results much faster since you won't have to advance the results page after every 25 list citations.

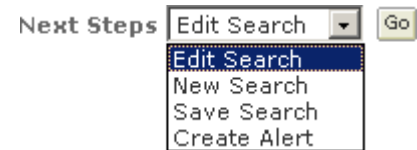
General Search and Results

Displaying Search Results

Results Per Page

Next Steps

The Next Steps drop-down offers you the option to continue your research with either an altered version of your current search, or a completely new search. Next Steps options also include saving searches for future use or creating Alerts for proactive topic monitoring. Let's take a look at each of these steps.



Editing a Search/Creating a New Search

When reviewing your search results, you may determine that different search terms would better meet your needs than the current terms. To change the terms, you may either edit your current search or create an entirely new search.

To edit a search, select **Edit Search** in the Next Steps drop-down list and click 'Go.' This displays the Search form you used to enter the current search. The current search appears on the form, where you may add, delete or change terms as necessary and run the search again.

To create a new search, select **New Search** in the Next Steps drop-down and click 'Go.' This displays the Search form you used to enter the current search. Enter a new search, selecting a new source if necessary, and click the Search button to run it.

Saving a Search

Select **Save Search** in the Next Steps drop-down and click 'Go.' You will be prompted to confirm the details of the saved search and give it a name. For more information about Saved Searches see pages 60-61.

Note: If you would like to run a saved search regularly and automatically, you may save it as a scheduled search by clicking the 'Save as an Alert' checkbox. For more information, refer to Alerts section on pages 62-63.

Creating an Alert


Select 'Create Alert' in the Next Steps drop-down and click 'Go.' Scheduled Searches provide you with automatic updates to your search results at specified intervals. You will be prompted to name the Alert, and specify your notification and results format preferences. For more details about Creating Alerts see pages 62-63.

View Tagged/View All Results

(To tag a document, click the checkbox next to the document name.) Click the View Tagged button to display only the documents you have tagged in the current set of results. When viewing the tagged documents, click the View All Results button to return to the original display.

Alert & Delivery Options

Create an Alert Icon

Click this icon  to set this search up to run on a schedule that you specify and deliver results to you automatically. For more details about Creating Alerts see pages 62-63.

Delivery Icons - Click one of the following icons to **Print** () , **Email** () , or **Download** () your results.

 **Print all or selected documents to an attached printer.**

Use the Print Documents form (pictured on next page) to print your Nexis documents to your attached printer through your browser. To submit a print request, complete the form as described below.

Note: Printing is subject to Terms and Conditions (see the 'terms and conditions' link on the Print Documents form).

- Source:** Displays the name of the source that you used for your search.
- Terms:** Displays the search terms that you used for your search.
- Narrowed Terms:** Review the search terms you used for your narrowed search (if any).
- Printer:** The documents will print in HTML format.

Add a Brief Note:

Type a short note (up to 362 characters) to be included on the cover page of your printout. If you enter a note in this field, the text will appear on a cover page even if you don't select 'Cover Page' under Page Options.

Document View

From the drop-down list, select the Document View format in which you want the documents to be printed: List, Expanded List, Full Document, Full with Indexing, KWIC, or Custom. For details on each of these formats see the View by Selected Format section on pages 50-51.

Document Range

Select the appropriate option to print:

- **Current Document** – This option is available only if you are currently viewing a document in Full.
- **All Documents**
- **Tagged Documents** – If you tagged documents in your list to be printed (by checking the boxes next to particular results), the number of tagged documents is displayed in this box.
- **Selected Items** – Type the document numbers of specific documents you want to print.

You may type single document numbers (separated by commas) or a range (e.g., 1, 3-5, 9). This option may not appear if you ran your search from the Easy Search form.

Page Options

Specify the page options to be used with your printed documents:

- **Cover Page** – Select the Cover Page option to include a cover page with your document set, with information such as the time of request, documents requested, and number of lines. **Note:** You must select the Cover Page option to include client or project information with your printed documents.
- **End Page** – Select the End Page option to include an end page with your document set, with information such as the time of request, number of lines, and number of pages.
- **Each Document on a New Page** – Select this option to begin each new document in your results on a new page. Otherwise, each new document begins on the same page that the previous document ends.

Font Options

Select the font options to specify how you want your printed documents to look. Most options are self-explanatory; however, note that the Times New Roman font is best for cases, law review articles, statutory materials and any long documents that are typically read in printed form. Courier is best for tables, financial reports, SEC filings and other types of content that don't display well with varying font widths.

Note: Some documents are required by contract to be printed in a specific font. If you are printing one of these documents, all or a part of the document will be printed in the required font even if you have selected a different one.

Print

To begin printing your documents, click the Print button.

Print Preview

Click this button to view your selected documents in a browser window without the links and graphics on the page. Use the browser to print your documents. **Note:** If Windows XP® Service Pack 2 is installed on your PC, you may need to follow some configuration steps in order to use the print preview feature.

Cancel

To return to your results without printing, click the Cancel button.

What to Expect

After you click Print on the Print Documents form, the following occurs:

1. The Print Status message window notifies you that your request is being processed and provides an estimate of how many pages are printing.
2. A Print dialog box appears where you may select your attached printer.
3. Follow the instructions on the Print dialog box instructions to print your documents.

Print Documents

Source: News, All (English, Full Text)
Terms: lexisnexis or lexis nexis
Narrowed Terms: atl3(body(lexisnexis or lexis nexis))

Printer: Attached Printer Print Print Preview Cancel

Add a Brief Note:

Document View:

Document Range:
 All Documents (1 - 14)
 Tagged Documents (3)
 Selected Items
 e.g. 1,3-5,9

Page Options
 Cover Page
 End Page
 Each Document on a New Page
(not available in HTML format)

Font Options

 Search Terms in Bold Type
 Search Terms Underlined

Print Print Preview Cancel

Print delivery is subject to [terms and conditions](#). Please review them.

Email all or selected documents to one or more Email addresses.

Use the Email Documents form to Email your Nexis research documents via Email. Check with your company's system administrator if this Email method is not available to you. You may send documents to up to three recipients at a time.

Note: Emailing is subject to Terms and Conditions (see the 'terms and conditions' link on the Email Documents form).

Source:

Displays the name of the source that you used for your search.

Terms:

Displays the search terms that you used for your search.

Narrowed Terms:

Review the search terms you used for your narrowed search (if any).

Send as:

Select from the drop-down list whether to deliver your results as an attachment or as text within the body of the Email

Email format:

Select the format in which you want to Email your documents. (The last format chosen is the default on subsequent requests.)

Format Options/Application:

- **Word** (.DOC) / Microsoft® Word
- **HTML** / Your Web browser
- **Text** (.TXT) / Generic word processor using Text Only format – Note: Bold, italic, and underlined fonts are not available in .txt file format.
- **Generic** (.RTF) / Generic word processor using Rich Text format – Generic (RTF) format is not available for the inline text option.

Email Address

Type the recipient's Email address in the box provided (e.g., jane.doe@lexisnexis.com). You may enter up to 3 addresses, separated by semicolons.

Last 10 Email Addresses

Instead of entering a new Email address, you may select from a list of recently used addresses.

Add a Brief Note

You can add a brief note to be included with the Emailed documents. The note will appear at the top of the documents, with other information, such as the time of the Email request, search terms, etc.

Document View

From the drop-down list, select the Document View format in which you want the documents to be Emailed: List, Expanded List, Full Document, Full with Indexing, KWIC, or Custom. For details on each of these formats see the View by Selected Format section on pages 50-51.

Document Range

Select the appropriate option to Email:

- **Current Document** – This option is available only if you are currently viewing a document in Full.
- **All Documents**
- **Tagged Documents** – If you tagged documents in your list to be Emailed (by checking the boxes next to particular results), the number of tagged documents is displayed in this box.
- **Selected Items** – Type the document numbers of specific documents you want to Email. You may type single document numbers (separated by commas) or a range (e.g., 1, 3-5, 9). This option may not appear if you ran your search from the Easy Search form.

Page Options

Specify the page options to be used with your Emailed documents:

Email Documents

Source: News, All (English, Full Text)
Terms: lexisnexis or lexis nexis
Narrowed Terms: atl3(body(lexisnexis or lexis nexis))

Send as: Attachment

Email format: Word (DOC)

Email Address
e.g. name@company.com. Separate up to three email addresses using semicolons (;).

Last 10 Email Addresses:

Add a Brief Note:

Document View: Expanded List

Document Range:
 All Documents (1 - 14)
 Tagged Documents (3)
 Selected Items e.g. 1,3-5,9

Page Options
 Cover Page
 End Page
 Each Document on a New Page (not available in HTML format)

Font Options
Times New Roman
 Search Terms in Bold Type
 Search Terms Underlined

- **Cover Page** – Select the Cover Page option to include a cover page with your document set, with information such as the time of request, documents requested, and number of lines. **Note:** You must select the Cover Page option to include client or project information with your Emailed documents.
- **End Page** – Select the End Page option to include an end page with your document set, with information such as the time of request, number of lines, and number of pages.
- **Each Document on a New Page** – Select this option to begin each new document in your results on a new page. Otherwise, each new document begins on the same page that the previous document ends.

Font Options

Select the font options to specify how you want your Emailed documents to look. Most options are self-explanatory; however, note that the Times New Roman font is best for cases, law review articles, statutory materials and any long documents that are typically read in printed form. Courier is best for tables, financial reports, SEC filings and other types of content that don't display well with varying font widths. **Note:** Some documents are required by contract to be printed in a specific font. If you are printing one of these documents, all or a part of the document will be printed in the required font even if you have selected a different one.

Send

To begin Emailing your documents, click the Send button.

Cancel

To return to your results without sending the documents, click the Cancel button.

Download all or selected documents to a file.

Use the Download Documents form to download your Nexis research documents to a file. To submit a download request complete the Download Documents form, as described below.

Note: Downloading is subject to Terms and Conditions (see the 'terms and conditions' link on the Download Documents form).

Source

Displays the name of the source that you used for your search.

Terms

Displays the search terms that you used for your search.

Narrowed Search

Review the search terms you used for your narrowed search (if any).

Format

Select the format in which you want to download your documents. (The last format chosen is the default on subsequent requests.)

Format Options/Application:

- **Word** (.DOC) / Microsoft® Word
- **HTML** / Your Web browser
- **Generic** (.RTF) / Generic word processor using Rich Text Format

Document View

From the drop-down list, select the Document View format in which you want the documents to be downloaded: List, Expanded List, Full Document, Full with Indexing, KWIC, or Custom. For details on each of these formats see the View by Selected format section on pages 50-51.


Document Range

Select the appropriate option to download:


- **Current Document** - This option is available only if you are currently viewing a document in Full.
- **All Documents**
- **Tagged Documents** - If you tagged documents in your list to be downloaded (by checking the boxes next to particular results), the number of tagged is displayed in this box.
- **Selected Items** - Type the document numbers of specific documents you want to download. You may type single document numbers (separated by commas) or a range (e.g., 1, 3-5, 9). This option may not appear if you ran your search from the Easy Search form.

Download Documents

Source: News, All (English, Full Text)
Terms: lexisnexis or lexis nexis
Narrowed Terms: at13(body(lexisnexis or lexis nexis))

Format Word (DOC)  **Download** X **Cancel**

<p>Document View: Expanded List</p>	<p>Document Range:</p> <p><input type="radio"/> All Documents (1 - 14) <input checked="" type="radio"/> Tagged Documents (3) <input type="radio"/> Selected Items e.g. 1,3-5,9</p>
<p>Page Options</p> <p><input type="checkbox"/> Cover Page <input type="checkbox"/> End Page <input checked="" type="checkbox"/> Each Document on a New Page (not available in HTML format)</p>	<p>Font Options</p> <p>Times New Roman</p> <p><input checked="" type="checkbox"/> Search Terms in Bold Type <input checked="" type="checkbox"/> Search Terms Underlined</p>

 **Download** X **Cancel**

Download delivery is subject to [terms and conditions](#) . Please review them.

Page Options

Specify the page options to be used with your downloaded documents:

- **Cover Page** - Select the Cover Page option to include a cover page with your document set, with information such as the time of request, documents requested, and number of lines. **Note:** You must select the Cover Page option to include client or project information with your downloaded documents.
- **End Page** - Select the End Page option to include an end page with your document set, with information such as the time of request, number of lines, and number of pages.
- **Each Document on a New Page** - Select this option to begin each new document in your results on a new page. Otherwise, each new document begins on the same page that the previous document ends.

Font Options

Select the font options to specify how you want your downloaded documents to look. Most options are self-explanatory; however, note that the Times New Roman font is best for cases, law review articles, statutory materials and any long documents that are typically read in printed form. Courier is best for tables, financial reports, SEC filings and other types of content that don't display well with varying font widths. **Note:** Some documents are required by contract to be printed in a specific font. If you are printing one of these documents, all or a part of the document will be printed in the required font even if you have selected a different one.

Download

To begin downloading your documents, click the Download button. **Note:** Downloading is subject to Terms and Conditions (see the 'terms and conditions' link on the Download Documents form).

Cancel

To return to your results without downloading, click the Cancel button.

J **Headline Linking** Click on a 'headline' to access the full text of a document. In sources other than News the 'headline' is likely the source name.

[LexisNexis Group Names Walsh President and CEO of U.S. Legal Markets; Walsh to Lead Company's Drive to Provide Total Practice Solutions to Nation's Legal Professionals](#)

Business Wire, May 16, 2006 Tuesday, 366 words

[LexisNexis](#) Group today announced that ...

... named president and CEO of [LexisNexis](#) U.S. Legal Markets. [LexisNexis](#) Group is a leading ...

... recently, Walsh led the [LexisNexis](#) division responsible for ...

... company as global head of [LexisNexis](#) Strategy and Business Development ...

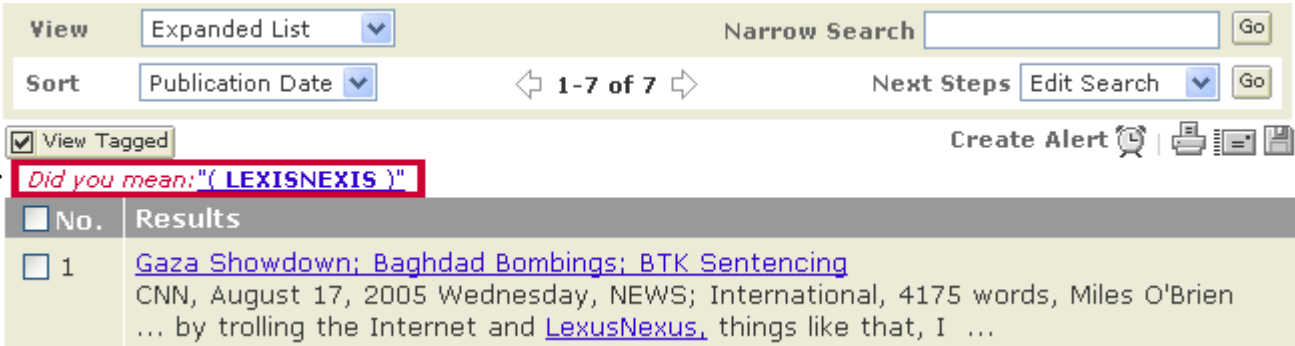
... today serve as the foundation of [LexisNexis\(R\)](#) Total Practice ...

K **Jump-To Linking** If you click on one of your keyword hits from the Expanded List View you will be taken to that portion of the full text document.

SPELLCHECKING OPTION: DID YOU MEAN?

If you have the spellchecking feature turned-on within your Search and Results Preferences and this system identifies a possible misspelling in your search, you will receive a “*Did you mean*” prompt.

In the example below, the search entered was “LexusNexus,” a misspelling. The system suggests that I may have intended “LexisNexis.” If the system is correct, click the link for the suggested term(s) in order to view the revised results. In the screenshot below i would click the link reading: “([LEXISNEXIS](#))”.



The screenshot shows a search interface with the following elements:

- View:** Expanded List
- Sort:** Publication Date
- Page:** 1-7 of 7
- Next Steps:** Edit Search
- View Tagged:**
- Did you mean:** "([LEXISNEXIS](#))" (highlighted with a red box and a red arrow)
- Results:**

No.	Results
<input type="checkbox"/> 1	Gaza Showdown; Baghdad Bombings; BTK Sentencing CNN, August 17, 2005 Wednesday, NEWS; International, 4175 words, Miles O'Brien ... by trolling the Internet and LexusNexus , things like that, I ...

SEARCH ADVISOR SAYS:

When devising brand names, companies often use orthographic devices to help make their products more memorable. Orthographic devices include unusual or incorrect spellings, such as Kool-Aid. This strategy involves creating names that have certain linguistic qualities that make them unique in a media environment. Unfortunately this can cause the spellchecker in the Nexis service to go wild. So if you search a lot of unusual brand names, you may want to disable this feature.

To enable/disable the spellchecking feature, click the [Preferences](#) link in the upper right hand corner of any page, select the Search and Results tab, and then select or deselect the spelling checker option.

General Search and Results

Automatic Spellcheck

Turn on automatic spelling checker

HISTORY & ALERTS

The History & Alerts tab provides a single location in which to manage all of your past research activities, including recent searches, recently viewed documents, saved searches, and Alerts.

HISTORY – RECENT SEARCHES

The Recent Searches section beneath the History portion of the History & Alerts tab lists all searches you have run over the last seven days with the time, date and number of documents found displayed in columns. You may run, edit, or delete any recent search. You may also schedule a recent search as an Alert.

The screenshot shows the 'History & Alerts' tab selected. Below it are sub-tabs for 'History', 'Recent Searches', 'Recent Documents', and 'History'. A message states: 'Each search you have run over the past seven days is listed below (up to a limit of 100 searches). You may run, edit, or delete any Recent Search.' A table lists five searches with columns for checkboxes, search terms, viewed dates, times, result counts, and links for 'Run', 'Edit', and 'Alert'. Search 5 is highlighted, and a red circle around its information icon points to a 'Recent Search Information' pop-up window. The pop-up displays: 'Recent Search Name: General Search>[Industry]>(online information services) and DATE(>=2005-04-19)', 'Source: Industry', 'Search Terms: (online information services) and DATE(>=2005-04-20)', 'Project ID: None', and 'Date/Time Search Was Run (local time): 04/19/06 20:08'. A 'Close Window' button is at the bottom right.

<input type="checkbox"/>	Search Terms	Viewed	Time	Results	Run	Search	Schedule as...
<input type="checkbox"/>	1. ((sexual harrassment or sued or...	04/19/06	22:07	1130	Run	Edit	Alert
<input type="checkbox"/>	2. (caps(moreover pre/1 plur(techno...	04/19/06	22:07	16	Run	Edit	Alert
<input type="checkbox"/>	3. (microsoft and 2005) and DATE(>=...						
<input type="checkbox"/>	4. (zip(94107)) and DATE(>=2006-01-1...						
<input type="checkbox"/>	5. (online information services) an...						

Information Icon – Search Summary

Click the button to display a complete description of your search, including Name, Source, Search Terms, Project ID, and Date/Time Search Was Run.

Edit

Click the [Edit](#) link next to the recent search that you want to modify. The original form that you used to create the search is displayed, allowing you to modify the search parameters and re-run the search.

Delete Selection(s)

Select a checkbox next to one or more recent searches and then click the Delete Selection(s) link to delete those items. To delete all items, select the checkbox in the header row, then click the Delete Selections link.

Run

Click the [Run](#) link next to the appropriate search. The search will run automatically and the results will be displayed on the screen. Note: If an additional charges icon (\$) is displayed next to the Run link, you will incur additional charges for running the search.

Alert

Click the [Alert](#) link to schedule a recent search as an Alert. Alerts are searches that run at specified intervals and deliver their results to you automatically.

Page Navigation Links and Arrow Buttons

If you have more than 50 searches in your list, use the page navigation links () at the bottom of the page to move back and forth within your list. This feature will automatically record up to 100 searches.

HISTORY – RECENT DOCUMENTS

The Recent Documents section beneath the History portion of the History & Alerts tab lists all of the documents you have viewed in Results over the last 48 hours.

The screenshot shows the 'History & Alerts' tab with sub-tabs for 'History', 'Saved Searches', and 'Alerts'. The 'Recent Documents' section is active, displaying a table of documents viewed in the last 48 hours. An information icon (i) next to the fifth document, 'VeriSign acquires news aggregato...', is highlighted with a box and an arrow pointing to a 'Recent Document Information' pop-up window.

Name	First Viewed	Last Viewed	Time
1. Hoover's Industry Snapshots, 2006	04/19/06	04/19/06	20:08
2. In Re SEIDENFELD LAURENCE	04/19/06	04/19/06	16:49
3. Congress, Vendors Put Phishing U...	04/19/06	04/19/06	09:57
4. Cyber crime real worry for onlin...			
5. VeriSign acquires news aggregato...			

Recent Document Information

Recent Document Name: VeriSign acquires news aggregator Moreover Technologies for \$30 million The Associated Press State & Local Wire October 17, 2005, Monday, BC cycle

Source: The Associated Press State & Local Wire

Project ID: None

[Close Window](#)

Information Icon – Document Summary

Click the button to display a complete description of your document, including complete Name, Source and Project ID.

Document Name

Click the name of a recent document to view the document again.

Page Navigation Links and Arrow Buttons

If you have more than 50 documents in your list, use the page navigation links (1 2 > >>) at the bottom of the page to move back and forth within your list. This feature will automatically record up to 100 documents.

SAVED SEARCHES

The Saved Searches section beneath the History & Alerts tab allows you to run, edit, and delete the searches you have saved. You may save up to 50 searches. You may also schedule any saved search as an Alert. **Note:** It is not possible to save searches from gateways such as Dun & Bradstreet and the Delaware Secretary of State Gateway.

The screenshot shows the 'Saved Searches' section under the 'History & Alerts' tab. It includes instructions on how to create an alert and view existing searches. Below the instructions is a table of saved searches.

<input type="checkbox"/>	Name	Run	Search	Schedule as...
<input type="checkbox"/>	1. Minority-Owned Biz in SF	Run	Edit	Alert
<input type="checkbox"/>	2. New Nexis	Run	Edit	Alert
<input type="checkbox"/>	3. Venture Cap for Renewable Energy	Run	Edit	Alert

[Delete Selection\(s\)](#)

Saving a Search

You may save a search from any Search form page or when you are viewing your results.

From the Search form page:

1. Complete the Search form by entering search terms, selecting a source, specifying a date range and making any optional selections.
2. Click the ['Save This Search'](#) link. You will be prompted to confirm the details of the saved search and give it a name.

From your results page:

1. Review your results.
2. Select the Save Search option from the Next Steps drop-down list and click 'Go.' You will be prompted to confirm the details of the saved search and give it a name.

Note: If you would like to run a saved search regularly, you may save it as a scheduled search by clicking the 'Save as an Alert' checkbox that will be visible as you are naming your search. For more information, refer to Alerts on pages 62-63.

Information icon (i) – Search Summary

Click this icon to view the details of a saved search, including its search terms, Search form, and the date and time it was run.

Running a Saved Search

Click the [Run](#) link next to the saved search. The search will run automatically and the results will be displayed on the screen.

Editing a Saved Search

You may modify any of the criteria for your saved search, including the search terms, the source that was used, or the search name. Click the [Edit](#) link next to the saved search that you want to modify. The original form that you used to create the search is displayed, allowing you to modify the search parameters and re-run the search.

Scheduling a Saved Search as an Alert

Click the [Alert](#) link next to the saved search that you want to schedule as an Alert. A form is displayed prompting you for the Alert settings.

Note: Some sources might not be available to schedule as an Alert.

Delete Selections

Select a checkbox next to one or more recent searches and then click this link to delete those items.

Page Navigation Links and Arrow Buttons

If the list showing your saved searches is too long to fit on a single page, use the linked page numbers and arrows to move between the saved searches pages.


ALERTS

When you run a search that retrieves results that you want to update periodically, you may save the search as an Alert. Alerts are scheduled searches that run automatically at the times you choose, sending you scheduled Email notices of the latest results. If no results are retrieved from your original search you may still save it as an Alert. That way, you will be notified as soon as anything on your topic of interest hits the system.

Currently, you can *not* save an Alert from a search across content categories (e.g. News & Legal), nor from a Natural Language search.

CREATING AN ALERT

You may create an Alert in several ways:

- From any Search form, click the 'Save This Search' link. On the Save Search form, select the 'Save as an Alert' checkbox.
- From the Results page, select the Save Search option from the Next Steps drop-down list and click 'Go.' On the Save Search form, select the 'Save as an Alert' checkbox.
- From the Results page, click the Create Alert  icon.
- From the Results page, select the Create Alert option from the Next Steps drop-down list and click 'Go.'
- Click the History & Alerts tab, and then click the History sub-tab. Click the Recent Searches or Saved Searches tertiary tab. Click the Alert link next to the recent search or saved search that you want to set up as an Alert.

From there...Fill-in the 'Schedule as Alert' Form

(Displayed here in four pieces so as to more easily present your options)

Save As

Give the search a name that you will use later to retrieve it.

Project ID

The Project ID associated with your Alert is displayed. Click 'Change Project ID' to change the Project ID for this Alert.

Save as an Alert

Click this checkbox to save your search as an Alert. When you click this checkbox, you must also fill out the additional Alert options that appear on the form (see below).

Note: Searches run with Natural Language or with certain sources cannot be scheduled as an Alert.

Alert Schedule

These settings apply only when you have selected the 'Save as an Alert' checkbox.

Manually

If you choose this option, your Alert will *not* run automatically at scheduled intervals. It will only run at your request.

Daily

Schedule your Alert to run:

- Every day or on business days.
- Once, twice, or three times daily. (If you choose one time daily, you may specify a delivery time. If you choose two or three times daily, the delivery times are set for you)

Weekly

Specify a day of the week and a time of day to run your Alert.

Monthly

Specify a day of the month and a time of day to run your Alert.

Time Zone

Select your time zone from the drop-down list.

Run this...

Manually--No Automated Alerts

Daily:

Monday - Friday

Schedule

1

time(s) per day at

8:00 AM

Weekly:

Monday

at 8:00 AM

Monthly:

1st

day of the month at

8:00 AM

Time Zone

Pacific Time (GMT-8:00)

*Daylight Savings Time Not Observed

Delivery Options

These settings apply only when you have selected the 'Save as an Alert' checkbox.

View online only

Choose this option to view your results online at *nexis.com*®. If you select this option, you will not receive an Email notification when new results are available.

Email to

Choose this option if you want to receive an Email when new results are available. Specify the Email address to which the notice will be sent when there are new results. You may only send the Email to one recipient.

Last 10

Instead of entering a new Email address, you may select from a list of recently used addresses.

Send As

Choose whether to deliver your results as an attachment or as text within the body of the Email.

Email format

Select the format for your Email:

- If you choose to receive your results in an attachment, you may choose from Word (Doc), HTML, or RTF (generic).
- If you choose to receive your results in the body of the Email (inline), you may choose HTML or Text.

Alert me only if there are new results

Click this checkbox to receive an Email only when new results are available. If this checkbox is not selected, you will receive Emails as you have scheduled them, even if there are no new results.

Include Alert settings

Click this checkbox to include a summary of the setup information (such as sources and frequency) in the Email notice.

Results format

Specify how you want your results to be presented when viewing your results online or in an Email notice.

All Documents, List View only	Choose this option to see a list of your results and basic information about them.
All Documents, Expanded List View	Choose this option to see the same information as in List view, as well as each of your search terms in context within a portion of the document.
First 10 Documents, KWIC	Choose this option to see your first 10 documents with your terms highlighted and surrounded by a window of about 25 words of text.
First 25 Documents, KWIC	Choose this option to see your first 25 documents with your terms highlighted and surrounded by a window of about 25 words of text.
First 100 Documents, KWIC	Choose this option to see your first 100 documents with your terms highlighted and surrounded by a window of about 25 words of text.
First 10 Documents, Full View	Choose this option to see the complete text of your first 10 documents.
First 25 Documents, Full View	Choose this option to see the complete text of your first 25 documents.
First 100 Documents, Full View	Choose this option to see the complete text of your first 100 documents.
Just Notify Me	Choose this option to see only a link to your results on <i>nexis.com</i> , but none of the results contents in the Email. Note: This option is available for Email notices only.

Do not include duplicate documents

Select this option to ensure that duplicate documents are not included in your Alert results. If you do not select this option, you may receive multiple copies of the same document.

Delivery Options

View online only

Email to
e.g. name@company.com

Last 10

Send as Email format

Alert me only if there are new results


Include alert settings (e.g. frequency, results format)

Results Format

Do not include duplicate documents

Last Step...

Click  **Save** to save the search under the name you entered.

If you clicked the 'Save This Search' link from a search form without first running the search, click  **Test Search** to test the results of your search before saving it as an Alert. You will also see this button when you 'convert' a search to an Alert from the Saved Search or Recent Search page beneath the History & Alerts tab.

Click the  **Cancel** button to return to the previous screen without saving the search or Alert.

WORKING WITH EXISTING ALERTS




The Alerts section beneath the History & Alerts tab lists the Alerts that you have already established. From here you may view, modify, or delete your existing Alerts.

Search Sources **History & Alerts**

History | Saved Searches | **Alerts**


Alerts [Make This My Start Page](#) ?

Alerts automatically provide updates to your search results at specified intervals. To set up an alert, click the "Save This Search" link on any search form or the "Create Alert" link on the results page.


<input type="checkbox"/>	Name	Archive	Last Run	Schedule	Search
<input type="checkbox"/>	 1. (publication(government or judic...		04/20/06: 14:47 Run Now	Change	Edit
<input type="checkbox"/>	  2. Bush Headlines (New Documents)	Search Archive	04/20/06: 15:38 Run Now	Change	Edit

[Delete Selection\(s\)](#)

Information Icon – Alert Summary

Click the  to view a summary of the current search parameters and settings.

Plus/Minus Icons

Click the  next to the name of an alert to view the results archives, organized by date. Click an archive link to view the results for that date. On days when there are no new results, dates do not appear in the archives list.

Click the  to collapse the archives list.

Name links – Latest Results

Click the alert name to view the latest documents. (New Documents) appears next to an alert when there are new results.

Search Archive

Click [Search Archive](#) to search the last 90 days of results for an alert.

Run Now

Click [Run Now](#) to run an alert manually. The next scheduled run will only include new results that have been loaded into the system since the last manual alert was run.

Change (Schedule)

Click [Change](#) to edit the schedule for a search. See the previous section 'Creating an Alert' for details about scheduling options.

Edit (Search)


Click [Edit](#) to modify the search parameters, including search name, search terms, sources, dates, and Project ID.

When you have finished making your changes, click **Test Search** to test the changes before saving them.

Delete Selection(s)

Select a checkbox next to one or more alert names then click [Delete Selection\(s\)](#) to delete the selected items. To delete all items, select the checkbox in the header row then click this link.

Page Navigation Links & Arrows

If the list showing your Alerts is too long to fit on a single page, use the linked page numbers and arrows () to move between the pages.

GETTING HELP & ONGOING UPDATES

USING ONLINE HELP


Two types of online help built right in to the new Nexis service to assist you in using this product: General Help and Form Tips.

General Help

You can access general help for each page by clicking Help on the Nexis top navigation bar. Inside the help:

- Navigate using the table of contents and index, located on the left side of the help window, to find other areas of interest.
- Click the Back link in the bottom pane to return to a previous section.
- Click the Print Help link to print the Help contents you are currently viewing.

Form Tips

Detailed help is available for every form (such as Company Profiles Search, Preferences, and so forth). You can access form help by clicking the question mark icon  in the upper right corner of any form.

MY ID

Click the My ID link at the bottom of any page to view your user ID. If you need to contact Customer Support, this ID will allow them to resolve your issue more efficiently.

CUSTOMER SUPPORT

Recognized by *Searcher Magazine* with the highest overall rating for a variety of customer support parameters and capabilities, the LexisNexis Customer Support organization delivers superior service and support to increase your productivity and effectiveness. You can rely on exceptional customer support 24 hours a day, 7 days a week.

The LexisNexis Customer Support staff includes professionals with the following education and experience:

- Information professionals
- Financial planners and stock brokers
- Communications
- Business administration
- Marketing
- Economics
- Accounting
- Legal (attorneys and paralegals)

CUSTOMERS INSIDE THE U.S.:

1-800-543-6862

(Telephonic Device for the Deaf (TDD) - 1-800-732-5306)

CUSTOMERS OUTSIDE THE U.S.:

LexisNexis Customer Support at World Headquarters Dayton, Ohio (Toll Free Numbers):

Calling from this Country

Australia
Canada (Internet products support)
Canada (CD-Rom products support)
Caribbean
France
Germany
Hong Kong, SAR
Jamaica
Japan
Malaysia
Mexico

Number to Reach World Headquarters

0011-800-543-68621
1-800-387-0899
1-866-293-3836
1-800-543-6862
00-0800-543-68621
0800-81-53740
800-96-8733
0-800-543-6862
00531-11-3259
1-800-80-2291
95-800-543-6862

Netherlands	00800-9999-7777
New Zealand	0800-44-0814
Puerto Rico	1-800-543-6862
Saipan	1-800-543-6862
Singapore	800-1100-415
Switzerland	0800-89-7074
Taiwan	0080-10-3330
Trinidad/Tobago	001-800-543-6862
England (UK)	00800-895-107
All other Non-US locations	1-937-859-5398 (collect)

TRAINING OPTIONS

Allow our Trusted Team of Experts to help you learn more about the Nexis service. Training options are versatile to help you fit Nexis into your busy schedule.

New Nexis Customer Migration Site

Shifting to the new Nexis interface? The Customer Migration site for the new Nexis service offers product literature, training information, tutorials, FAQs, and other helpful materials. Just visit: <http://www.lexisnexis.com/customermigration/>.

Personalized Telephonic Training

Choose this option if you prefer learning in private. Dedicated LexisNexis instructors offer over-the-phone instruction with content customized to suit your particular skill level and online research needs. Sign up for your personalized telephonic training session by visiting <http://www.lexisnexis.com/nexistraining/>.

On-Site Training*

Obtain customized on-site instruction for your organization from a dedicated LexisNexis Consultant who will design each session based on your online research needs. To find out more about on-site training availability, please contact your LexisNexis Account Manager directly, or call 1-800-262-2391.

*On-site training available on a limited basis.

LexisNexis Training Centers

Receive hands-on instruction in a classroom setting. Content is predetermined with a standardized format. Visit <http://www.lexisnexis.com/training/> for a list of locations and additional information about the LexisNexis Training Centers.

STAYING CURRENT ON NEW SOURCES, SYSTEM FEATURES AND SEARCH STRATEGIES

Subscribe to InfoPro Wire

An electronic newsletter designed especially for non-legal Information Professionals, which gives you "the scoop" on new sources, content applications and search tips, product enhancements, and more - direct to your inbox.

Subscribe by visiting:

<http://www.lexisnexis.com/trial/cfm105193infoprowire.asp?access=930044>.

Subscribe to the Information Professional Update

Also provides great search tips, and product information, but specifically for Legal Information Professionals.

Subscribe by visiting:

<http://www.lexisnexis.com/trial/NALM102646LNIPU.asp>.

Visit the InfoPro Web Site

Or visit the InfoPro Web site at <http://www.lexisnexis.com/infopro> for the most up-to-date information on sources, product enhancements, training & tutorials, professional development, conferences, and support. Though specifically designed for Law Librarians, the InfoPro site provides information that would benefit any information professional or deep researcher.

APPENDICES

APPENDIX A: SEARCHING PEOPLE'S NAMES

Because of the many ways a person's name can be expressed in a document, use the following search format to help ensure the most comprehensive results: **(first name OR nickname or first initial W/2 last name)**.

So, in order to find documents referring to David Jeremy Jones you would enter: **(david OR dave OR d W/2 jones)**

This search would find name variations such as:

David Jones	David J. Jones	Jones, Dave	Jones, D.J.
Dave Jones	D.J. Jones	Jones, D.	Jones, D. J.
D. Jones	D. J. Jones	Jones, David Jeremy	
David Jeremy Jones	Jones, David	Jones, David J.	

While this search will ensure that you retrieve all documents concerning the David Jones of interest, it will also retrieve records for *other individuals by the same name*.

SEARCHING COMMON NAMES WITH UNIQUE IDENTIFIERS

When searching by a person's name, the more common the name, the more false hits you will retrieve.

You may improve this situation dramatically by combining the person's name with a list of **'unique identifiers.'** Unique identifiers are any terms that pertain specifically to the person you have in mind and few others.

Think about what you know about the individual you are trying to search. Jot down a list of terms such as:


- Cities the person has lived in
- Academic institutions they've attended
- Names of their current/past employers
- Their profession or occupation
- Associations in which they are members
- Their spouse's name, and so on

A sample search might look like this:

(david OR dave OR d W/2 jones) AND (san francisco OR san mateo OR seacucus OR rutgers university OR lexisnexis OR acme company OR accountant OR cpa OR c.p.a. OR association of government accountants OR lisa)

When developing a list of unique identifiers it is important to think about the type of data that appears in the source(s) you plan to search. The search above would work well in a News database because News articles tend to include the types of information included in the search.

However, this search would work less well in a Bankruptcy database, for instance, because bankruptcy records do not include most of the things specified in the search. They don't include where a person went to school, or their work history, or association membership. They may include a spouse's name and address information, so those pieces of the search would be okay.

Think about the type of records you are searching before deciding on which terms to use in your search. Look at the [Source Information](#) () for the source in order to view a [sample record](#). This will help you identify what terms you should use to narrow your search on a person with a common name.

SEARCH ADVISOR SAYS:

The W/2 Connector will allow up to one word, such as a middle name or initial, to appear between the first and last names. If you want to allow up to two words to appear 'in between' use W/3 instead. The 'within' connector will allow your terms to flip-flop thus finding both first-name-first references, as well as last-name-first references.

Note: You will get more false hits when you use W/3, so decide carefully.

When searching news sources, where people *tend* to be mentioned first-name-first you may choose to use the PRE/2 (or PRE/3) Connector instead, which only looks for words in the order you've entered them, but still allows room for a middle name or initial to appear.

Note: There's always a chance, even in the news, that someone will be mentioned last-name-first, particularly in the byline section, so decide carefully.

APPENDIX B: COMMON NEWS SECTIONS

The following list provides a description of the most commonly used Document Sections¹ in news sources. Not all sections appear in every document. Use the Source Information Icon (i) next to the Source name to view a list of Document Sections for a particular source.²

¹ Documents Sections will be referred to as Segments in some LexisNexis products, and within the online Source Information.

² The Source Information page for Group Sources, such as News, All, does not contain a list of Document Sections.

BODY:	Contains the text of a story.	
BYLINE:	Contains the name of the person or entity identified as the author of the document as well as any biographical information.	
CORRECTION:	Contains the text of a correction issued by the publisher.	
CORRECTION-DATE:	Provides the date that the correction was published. You can search and sort this section by date.	
DATE:	Contains the publication date. You can search and sort this section by date.	
DATELINE:	Contains the geographical location from which the story originated, and may also contain a filing date.	
GRAPHIC:	Contains any information relating to pictures, illustrations, maps, cartoons, etc. Associated with the document.	
HEADLINE:	Contains all headings and subheadings that describe the story.	
HIGHLIGHT:	Contains a brief summary that emphasizes the theme of the story.	
HLEAD:	Comprises the HEADLINE, HIGHLIGHT, & LEAD Sections.	
LANGUAGE:	Indicates the language in which the document appears online. For non-English documents, the data within the section appears in English and the native language.	
LEAD:	Contains the first few sentences or paragraphs of the story's text.	
LENGTH:	Contains the approximate number of words in the body of a document. This section is arithmetically searchable.	
LOAD-DATE:	Contains the date the document was loaded to a database. You can search and sort this section by date.	
NAME:	Provides the name of the person that is the subject of the document.	
PUBLICATION:	Contains the copyright and publication name.	
SECTION:	Contains the name of the section and subsection of a document as well as the volume, issue and page number on which a document begins.	
TERMS:	Includes one or more of the following sections:	
	COMPANY	The company and organization term(s).
	COUNTRY	The country term(s).
	GEOGRAPHIC	The country and region terms.
	INDUSTRY	The industry terms.
	KEYWORD	The terms chosen by the vendor to "uniquely" identify the main story name.

	ORGANIZATION	The organization term(s).
	PERSON	The names of the persons indexed in the document.
	PRODUCT	The product terms.
	SUBJECT	The subject terms and the keywords.
	TICKER	The ticker symbol.
	TYPE	The descriptors classifying the subject matter of a document, i.e., analysis, biography, case study, editorial, obituary, review, etc.

APPENDIX C: COMMON FINANCIAL SECTIONS

The following list provides a description of the most commonly used Document Sections¹ in financial sources. Not all sections appear in every document. Use the Source Information Icon (i) next to the Source name to view a list of Document Sections for a particular source.²

¹ Documents Sections will be referred to as Segments in some LexisNexis products, and within the online Source Information.

² The Source Information page for Group Sources, such as All Company Information, does not contain a list of Document Sections.

ADDRESS:	Contains the address of the company described in the report. This section contains the main address of where the company is located. Address is a group section containing the following sections: STREET, CITY, STATE, COUNTRY, ZIP, TELEPHONE and FAX.
ASSETS:	Contains the assets portion of the balance sheet. This section is arithmetically searchable.
AUDITOR:	Contains the name of the auditor, and any information related to the auditor.
BALANCE-SHEET:	Comprises the Assets and Liabilities information in the Balance sheet.
CASH:	Contains the Cash on hand reported in the ASSETS portion of the BALANCE SHEET. This section is arithmetically searchable.
CASHFLOW-STMT:	Contains the amount of cash and marketable securities on hand at the end of the fiscal year.
CLOSE:	Contains the amount of cash and marketable securities on hand at the end of the fiscal year.
COMPANY:	Contains the name of the company that is discussed in the document.
COMPANY-NUMBER:	Contains all company numbers, e.g. DUNS, FORBES, CUSIP number, S&P ranking, etc... This section is a group section.
COMPANY-TYPE:	Contains the general category or classification of a company i.e., industrial, financial, public utilities, private, domestic, foreign, full financial coverage, FP corporate coverage, exporter, importer, etc.
COUNSEL:	Contains the name of the legal counsel representing the company and any information associated with the counsel.
CURRENT-ASSETS:	Contains the total current assets. It is part of the assets group section in the balance sheet. This section is arithmetically searchable.
CURRENT-LIAB:	Contains the total Current liabilities. It is part of the ASSETS group Section in the BALANCE-SHEET. This Section is arithmetically searchable.
DATE:	Contains the publication date of the report. You can search and sort this section by date.
DEBT:	Contains the total debt. This section is arithmetically searchable.
DESCRIPTION:	Contains a broad description or overview of a company.
DIVIDENDS:	Contains dividend information.
EMPLOYEES:	Contains the number of employees. This section is arithmetically searchable.
EPS:	Contains the Earnings Per Share. This section is arithmetically searchable.
EQUITY:	Contains a company's equity. This section is arithmetically searchable.
EXCHANGE:	Contains the exchange on which the company's stock is traded.
EXECUTIVES:	Contains the executives, directors, officers and CEO's of a company.

FYE:	Contains the closing date of the fiscal year end. You can search and sort this section by date.
HIGH:	Contains the high stock price for the most current year. This section is arithmetically searchable.
INCOME-STATEMENT:	Contains a table containing income data over a certain period of time. This section is a group section of arithmetic sections from an income statement.
INCORPORATION:	Contains a place and date of incorporation.
INDUSTRY:	Contains the industry name.
LANGUAGE:	Contains the language in which the document appears online. For non-English documents, the data within the section appears in the native language.
LENGTH:	Contains the approximate number of words in the major textual Sections. This Section is arithmetically searchable.
LIABILITIES:	Contains the liabilities portion of the balance sheet.
LOAD-DATE:	Contains the date the document was loaded into the database. You can search and sort this section by date.
LOW:	Contains the low stock price for the most recent year. This section is arithmetically searchable.
LTERM-DEBT:	Contains the long term debt from the balance sheet. This section is arithmetically searchable.
NAICS:	Contains the company's NAICS codes and descriptors.
NET-INCOME:	Contains the net income. This section is arithmetically searchable.
NET-SALES:	Contains the net sales for the current year. This section is arithmetically searchable.
PE:	Contains the price/earnings ratio. This section is arithmetically searchable.
PRI-SIC:	Contains the primary SIC code and its description.
PROPERTY:	Contains the textual description of property that a company owns.
PUBLICATION:	Contains the copyright and publication name.
REVENUE:	Contains the total income, sales, etc. This section is arithmetically searchable.
ROA:	Contains the return on assets. This Section is arithmetically searchable.
ROE:	Contains the return on investment (or Equity). This Section is arithmetically searchable.
2ND-SIC:	Contains the secondary SIC code and its description.
SIC:	Contains the primary and secondary SIC codes and descriptions.
SOURCE:	Contains the source for report or document.
STOCK-INFO:	Contains the stock price and premium information as well as any other information relating to the stock.
STOCK-PRICE:	Contains the high, low and closing stock price for the most recent year.
SUBSIDIARIES:	Contains the names of a company's subsidiaries.
TICKER:	Contains the ticker symbol.
TOTAL-ASSETS:	Contains the total assets of the company. This section is arithmetically searchable.

TOTAL-EQUITY:	Contains the total equity of the company. This section is arithmetically searchable.
TOTAL-INCOME:	Contains the total income from income statement. This section is arithmetically searchable.
TOTAL-LIAB:	Contains the total liabilities in currency of the company from Balance Sheet. This Section is arithmetically searchable.
TOTAL-PROPERTY:	Contains the total properties from the ASSETS portion of the balance sheet. This Section is arithmetically searchable.
TOTAL-SALES:	Contains the total properties from the ASSETS portion of the balance sheet. This Section is arithmetically searchable.

APPENDIX D: COMMON STATUTES SECTIONS

The following list provides a description of the most commonly used Document Sections¹ in statutes. Not all sections appear in every document. Use the Source Information Icon (i) next to the Source name to view a list of Document Sections for a particular source.²

¹ Documents Sections will be referred to as Segments in some LexisNexis products, and within the online Source Information.

² The Source Information page for Group Sources does not contain a list of Document Sections.

CITE:	The citation for a document.
HEADING:	The number and name of the topic under which a document has been organized.
HISTORY:	The history of a document.
NOTES:	The editorial notes pertaining to a document.
SECTION:	The number and caption of a document.
TEXT:	The text of a document.
UNANNO:	Searches, displays, and prints a document without annotations.

APPENDIX E: COMMON CASE LAW SECTIONS

The following list provides a description of the most commonly used Document Sections¹ in case law. Not all sections appear in every document. Use the Source Information Icon (i) next to the Source name to view a list of Document Sections for a particular source.²

¹ Documents Sections will be referred to as Segments in some LexisNexis products, and within the online Source Information.

² The Source Information page for Group Sources does not contain a list of Document Sections.

CITE:	The citation of the case in an official reporter or parallel reference.
COUNSEL:	The name of individuals, law firms, or organizations representing a party of interest in the case.
COURT:	The name of the court that heard the case.
DISPOSITION:	The final decision of the court. You can search segment by date.
HISTORY:	The prior and subsequent history of the case.
JUDGES:	The names of the judges hearing the case.
NAME:	The names of all the parties involved in a case.
NUMBER:	The docket number(s) assigned to a case by the court.
OPINION:	The text of the opinion issued by the court. It includes the majority, dissent, and concurrence.
WRITTENBY:	The name of the judge(s) authoring the opinion, including the majority, concurrence, and dissent.

APPENDIX F: LEXISNEXIS SMARTINDEXING TECHNOLOGY SOURCE COVERAGE

LexisNexis SmartIndexing Technology is applied to all news and Web content and to many legislative, company and reference databases. Terms are periodically applied retrospectively in each source.

NEWS SOURCES

English-language newspapers, news wires, newsletters, magazines, journals and transcripts. Includes Individual Sources (e.g. New York Times, Los Angeles Times, Chicago Tribune etc.) and Group Sources, such as (News, All; News, Most Recent Two Years; Major Newspapers, etc.).

WEB SOURCES (NEWS;WEB)

FEDERAL LEGISLATIVE SOURCES (TOPICAL INDEXING ONLY)

Bill Tracking Report (BLTRCK, BLT10n)

Congressional Full-text Bills (BLTEXT, BTX10n)

Congressional Record (RECORD)

Committee Membership Profile Report (COMTEE, COM10n)

House and Senate Floor Voting Records (VOTES, VOTARC)

Federal Regulation Tracking (FDRGTR)

U.S. Budget (BUDGET)

Committee Reports (CMTRPT)

Committee Prints (CMTPRN)

House and Senate Docs (HSDOCS)

Congressional Bill Legislative Forecasts (BLCAST, BLARCH)

Presidential Documents (PRESDC)

NCSL LegisBriefs (NCSLBR)

Federal News Service Daybook (DAYBOK)

Federal Election Commission - News Releases and Media Advisories (FECREL)

STATE LEGISLATIVE SOURCES (TOPICAL INDEXING ONLY)

State Bill Tracking (STTRCK, xxTRCK, TRCKyy)

State Full-text of Bills (STTEXT, xxTEXT, TEXTyy)

Regulations Tracking, All States (STRGTR, xxRGTR, RGTRyy)

RegAlert (RGALRT)

California Legislative Committee Analysis of Pending Bills (CACOMM)

COMPANY & INDUSTRY SOURCES (TOPICAL AND/OR COMPANY INDEXING ONLY)

America's Corporate Finance Directory (AMFIN)

Best's Company Reports (AMBEST)

Canada Business Directory (CANBIZ)

COFISEM, Quoted French & European Companies (COFISM)

Company Briefs – International (COBR)

Company Briefs - U.S. (COBRUS)

Company Intelligence – International (CIINTL)

Company Intelligence - U.S. (CIUS)

CoreData Canadian Institutional Database (MGCAN)

CoreData International Institutional Database (MGINTL)

CoreData US Institutional Database (MGUS)

Datamonitor Company Profiles (DMCO)

Datamonitor Industry Reports (DMIND)

Directory of Corporate Affiliations (DCA)

Disclosure (DISCLO)

EdgarPlus (EDGARP)

Extel Cards (EXTEL)

Financial Post Corporate Surveys (FPCORP)

Hoover Company Capsules (HVRCAP)
Hoover Company Profiles (HVRPRO)
Hoover Industry Snapshots (HVRIND)
ICC Full-Text Quoted Company Annual Reports (ICCCO)
Integra Industry Reports (INTIND)
Market Guide Company Profiles (MGDCOM)
Market Guide Industry Aggregates (MGDIND)
Market Guide Significant Developments (MGDDEV)
National Trade Databank Market Reports (MKTRPT)
OneSource Corptech Company Database (CPTECH)

Plunkett's Industry Reports (PLKIND)
ProfitCents Analyst Reports (VCENTS)
Standard & Poor's Corporate Descriptions (SPDESC)
Standard & Poor's Corporate Profiles (SPCOM)
Standard & Poor's Corporate Register (SPCORP)
Standard & Poor's Current Environment Reports (SPCER)
Standard & Poor's Daily News (SPNEWS)
Standard & Poor's Monthly Industry Review (SPIND)
U.S. Business Directory (USABIZ)
Weiss Stock Research Reports (WSSRPT)
Worldscope - International Company Profiles (WLDSCP)

COUNTRY REPORTS

EIU Country Reports (EIUCR)
PRS Group Political Risk Service (PRSRPT)

CHARACTER KEY:

n = a congressional session, such as the 104th Congress, e.g. BLT104
xx = a state postal code abbreviation, e.g. OHTEXT
yy = a year, e.g. TEXT99

APPENDIX G: FINANCIAL SOURCES WITH SPREADSHEET DOWNLOAD CAPABILITY

Source Name	File Name
Global Duns Market Identifiers	GDUNS
Duns Market Identifiers Plus	DMIP
Duns Non-U.S. Market Identifiers	DMINTL
Hoover's Company Profiles	HVRPRO
Hoover's Company Capsules	HVRCAP
US Business Directory	USABIZ
OneSource® CorpTech® Company Database	CPTECH
Nelson's Public Company Profiles	NELCOM
Disclosure® Online Database-US Public Company Profiles	DISCLO
Standard & Poor's Register of Corporations	SPCORP
Company Intelligence – U.S	CIUS

APPENDIX H: SYSTEM REQUIREMENTS

You want the fastest performance possible when you're using the Nexis service. Several factors affect performance while using the Nexis service, including the speed of your Internet Service Provider (ISP), the speed of your PC, and your own internal network. If you are experiencing slow access times because of high traffic or other problems, please contact your ISP. LexisNexis cannot control the access times of your internet service provider and cannot issue credits for problems related to your ISP.

Following are some recommendations for optimum performance:

Hardware

Processor	Pentium/100Mhz (or above)
RAM	32 MB (64 MB recommended)

Connection Methods

Modem	Speed: 56K* or above (ISDN, ADSL or cable modem)
LAN Connection	LAN (Local Area Network) TCPIP connection (also known as a TelNet connection) with at least a T1 connect speed

Browsers

Browser Versions

For optimal performance, we recommend using the following browsers:

Netscape® Navigator: 7.1/Mozilla 1.5
Netscape® Navigator: 7.2/Mozilla 1.7
Microsoft® Internet Explorer 5.5, 6.0 and above (PC)
Microsoft® Internet Explorer 5.2.3 and above (Mac)

Note: For fastest performance, enable the HTTP 1.1 protocol in your browser's advanced settings.

LexisNexis Customer Support troubleshoots all browsers that our customers use. While we cannot guarantee that all product features and functions will operate in browsers listed directly below, we strive at all times to provide you with the highest quality of support possible for your configuration.

Windows

Microsoft® Internet Explorer version 4.01 with Service Pack 2; 5.0 with Service Pack 2; 5.5 with Service Pack 2; 6.0
Netscape Navigator® version 4.7, 6.2, 7.0
AOL® 6.0
Firefox 1.0.2

Macintosh

Microsoft® Internet Explorer version 5.0
Netscape Navigator® version 4.7
Safari 1.3. and 2.0

Computer Screen Resolution

For optimal viewing, please set your computer screen resolution to a minimum of 800 by 600dpi (dots per inch). You can change these settings in your computer's display control panel.

Note: 640 by 480dpi resolution is still supported.

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