LexisNexis®

Lexis Advance Quicklaw User Guide

Lexis Advance® Quicklaw® delivers legal insight

Keep this guide close at hand for easy reference. It will be invaluable in helping you find and effectively use all of the Lexis Advance® Quicklaw® features you need.

ON THE ROAD? NEED THE FACTS?

You can access Lexis Advance Quicklaw with your smartphone, tablet or laptop at **www.lexisadvancequicklaw.ca.** Lexis Advance Quicklaw's display adapts automatically to your screen's size.

Download other Lexis Advance Quicklaw how-to literature, videos, tips and more!

Log in: **lexisnexis.ca/advance**

Learn more: **lexisnexis.ca/advancesupport**

The Lexis Advance Quicklaw Support Site offers help with log-in issues and provides updates on new enhancements.

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

START YOUR SEARCH: RED SEARCH BOX

When you log-in to Lexis Advance Quicklaw, the following landing page displays:
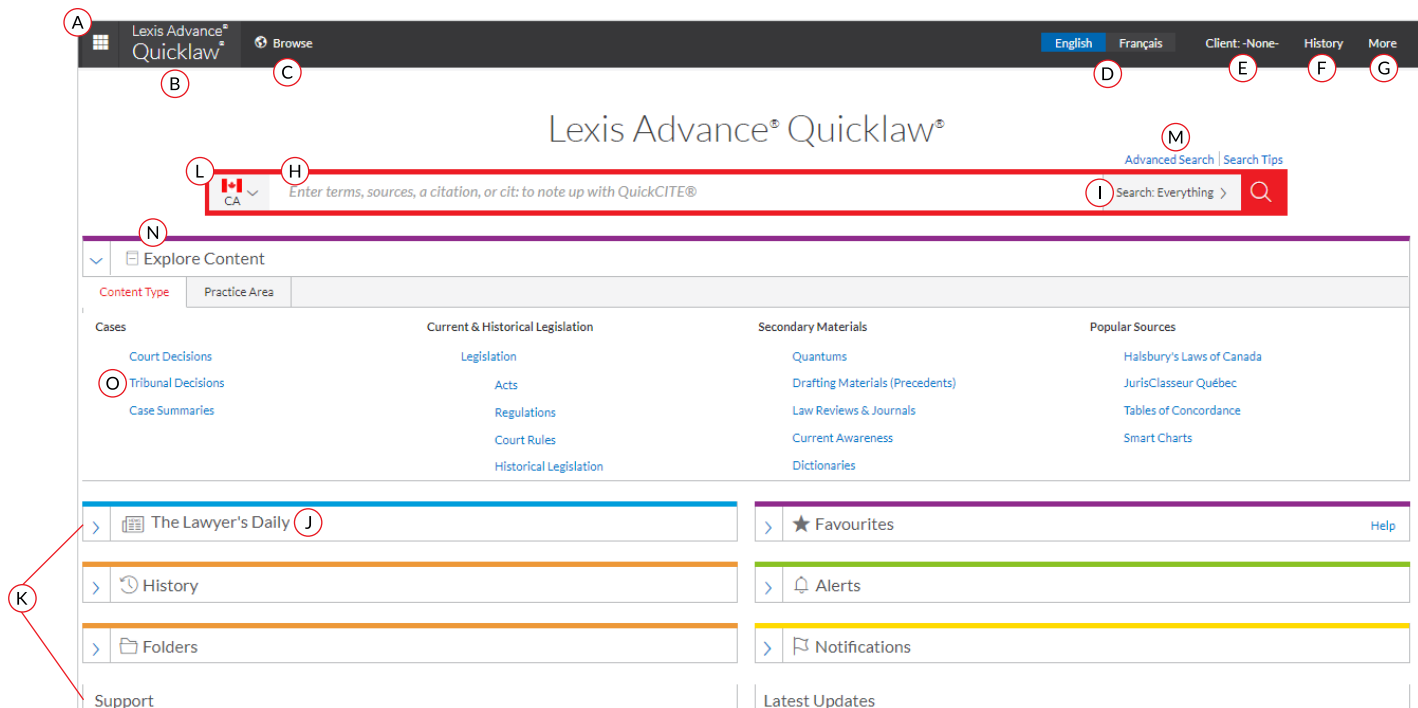
A   Use the Product Switcher to switch to other LexisNexis product subscriptions.

B   Return to this home page at any time by clicking on the Lexis Advance Quicklaw logo on any screen.

C   Browse sources or legal topics. Click **Browse**, then select **Sources** or **Legal Topics**. Drill down through the hierarchy or search for specific sources or topics.

D   English/French Toggle

E   Change/edit client matter IDs

F   View recent searches or retrieved documents. Your history is also accessible through the **History** pod below the red search box.

G   Access Folders, Alerts, Notifications and Settings
  - Customize the settings according to your reference.
  - Fill out feedback form for comments or suggestions.
  - Access to your help files.
  - Price Guide for content accessed outside the plan.
  - Customize your User ID and Password.
  - LNAC for administrative features.
  - Sign out of the product.

H   Enter your search words to find sources and more! As you type, the **Red Search Box** offers suggested legal phrases, documents and sources. You can search by:
  - Natural language
  - Terms and connectors search (*e.g., disability/20 alcohol!*)

- Citations (*e.g., 2005scj65*), to retrieve the full-text document as well as search results for that statute.

- Partial or full source title (*e.g., Copyright Board*) to find a source title to add to your search or to retrieve the source's documents.

- Case name (*e.g., Demoor v. Harvey*) to retrieve the fulltext document as well as any search results for that case.

- Statute name (*e.g., Bridges Act*) to retrieve the full-text document as well as search results for that statute.

- NoteUp with *Quick*CITE® request (*e.g., cit:2005 scj 65*)

(I) Narrow your search results by using **pre-filters** to search by jurisdiction, content category, or practice area and topic.

(J) Get the latest legal news, analysis and current awareness online from **The Lawyer's Daily.**

(K) Get there quicker! Use these pods for fast access to Favourite sources, Folders, Alerts and Legal Topic update notifications. A blue dot means that item has new information. The pods also offer access to Help topics and new Lexis Advance Quicklaw updates.

(L) International content: search sources from countries by selecting the country flag.

(M) **Advanced Search Forms** provide the ability to focus search terms to a specific document field or segment for different content types. Eg., search only in the **Judge** or **Counsel** document fields by selecting **Cases** under **Select a specific** content type to view content specific document fields.

(N) Use the **Explore Content Pod** tabs to select sources by **Content Type** or **Practice Area.**

(O) For example, to conduct a targeted Tribunal search, select **Tribunal Decisions, Jurisdiction,** and then choose the tribunal you would like to search.
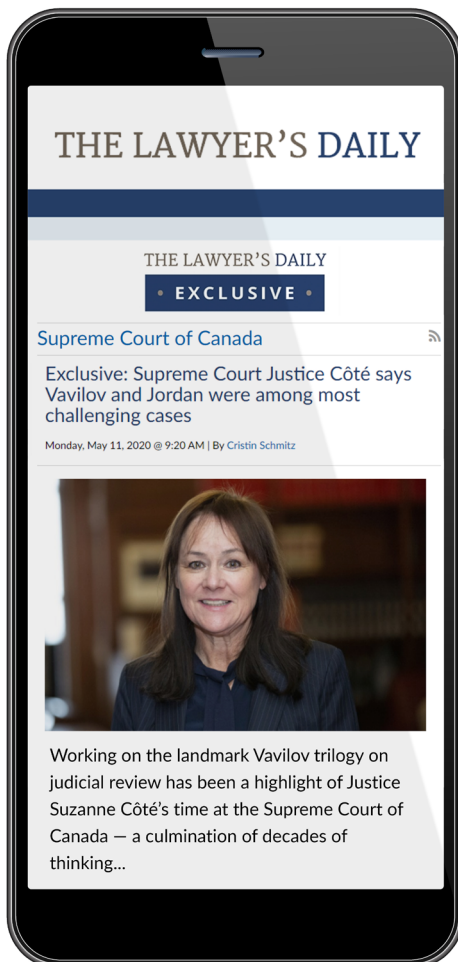
START YOUR SEARCH: EXPLORE CONTENT TO FIND SOURCES TO SEARCH

The Explore Content pod on the Lexis Advance Quicklaw home page lets you quickly assemble, search and review just the sources you want. Explore source hierarchies by Content Type, Jurisdiction or Legal Topics.

(A) Use the **Content Type** or **Practice Area** tabs to help you find and select sources to browse or search.

(B) Click through the source hierarchy screens.

- **Browse Popular Sources** will show you a list of related sources.

- Clicking on **Search Primary Law, Search Secondary Materials,** and **Search Drafting Materials** will open an Advanced Search Form for the selected content type.

(C) Select a source or search all sources on the screen displayed. The Red Search Box shows your choices as you select. When you're ready, enter your search words and search.

ADVANCED SEARCH: BUILD A SEARCH AND SEARCH BY SEGMENT

Select the **Advanced Search** above the Red Search Box to move to Advanced Search forms to search by content specific fields or segments.

Ⓐ Type in the fields and press enter to have your search built for you. As you enter your words in the fields the query displays in the Red Search Box.

Ⓑ To see content specific search fields, select from the "Select a specific content type" lists at the top or bottom of the page. For example, **Cases** is displayed.

Ⓒ See an example document to view the field or segment being searched.

Ⓓ Get help building a search using terms and connector operators.

Lexis Advance® Quicklaw®

(A) Advanced Search | Search Tips

CA ⌄ | Enter terms, sources, a citation, or cit: to note up with QuickCITE® | Search: Everything ›

Law Reviews and Journals | Select a different content type ⌄

Cases
Legislation
Drafting Materials
Dictionaries
News

∨ Secondary Materials
  Legal Encyclopedias
  Textbooks
  Law Reviews and Journals

∨ Quantums
  Carlson Personal Injury Quantum of Damages
  Canada Sentencing Quantums
  Quantum - Détermination de la peine
  Wrongful Dismissal Notice Searcher
  Canada Wrongful Dismissal Quantums

Search within entire docum...

Terms:
Enter specific text to search

To return exact matches only, use d...
To force Boolean searching, include...

Document Segments/Fields
Note: While these segments apply to the majority of documents they may not apply to all documents.

Article Title
Enter the title of the article, e.g. Focus Feature: Artificial Intelligence, Big Data, and the Future of Law

Author
Enter the name of the author, e.g. Anthony Niblett

Journal Title
Enter the journal title, e.g. "University of Toronto Law Journal"

Citation
Enter the description of Citation, e.g. 66 Univ. of Toronto L.J. 423

Date
Year ▾
(C)
YYYY

Abstract
Enter just keywords from Abstract

Article Text
Enter just keywords from Article Text

Highlight
Enter just keywords from Highlights

Search | Clear

(B)

Document Segments/Fields
Note: While these segments apply to the majority of documents they may not apply to all documents.

Case Name
Enter the descriptive name of the case, e.g. Kerr v. Danier Leather Inc.

Citation
Enter the description of Citation, e.g. [2007] 3 S.C.R. 331

Date
All available dates ▾
Date values will not appear in the search box but will be added to your search.

Jurisdiction   All | None

(D)
☑ Federal   ☐ Newfoundland and Labrador   ☐ Prince Edward Island
☐ Alberta   ☐ Northwest Territories   ☐ Quebec
☐ British Columbia   ☐ Nova Scotia   ☐ Saskatchewan
☐ Manitoba   ☐ Nunavut   ☐ Yukon
☐ New Brunswick   ☐ Ontario

(E) Court and Tribunal
Select Courts/Tribunals

Judge
Enter the name of Judge, e.g. McLachlin and Bastarache

Counsel
Enter any counsel members name

(F) Headnotes (Keywords + Summary)
Enter terms to be located (i.e. misrepresentation)

(A) Click on **Advanced Search** to access the Advanced Search Forms.

(B) Use the **"Select a specific content type"** pull down or use the list at the bottom left to access the different search forms.

(C) As an example, **Law Reviews and Journal Advanced Search Form** allow date-range searching. Options include the ability to restrict results to documents from: **year before, year after** or **year range**. This feature allows for focused results to a specific point-in-time.

(D) If you want to search cases, select **"Cases"** from the drop down menu, then select the jurisdiction for the Courts/Tribunals you would like to search.

(E) Select **Courts/Tribunals** icon. A court box will appear, select tribunals tab to select the tribunal you would like to search.

(F) Headnotes segment allows you to search the keyword and summary segments in our case law collection simultaneously.

FILTER: REFINE YOUR SEARCH AND SAVE TIME

You can always filter your search results to reduce the number of documents returned after you conduct the search, but you can also save time upfront by choosing filters before you search: **Jurisdiction, Content Type** and/or **Legal Topics.** You can also add or manage your **favourite sources, source combinations, recently used filter combinations** or frequently used legal topics. Finally, you can get assistance developing a terms & connectors search by using the **Assisted Search** option.
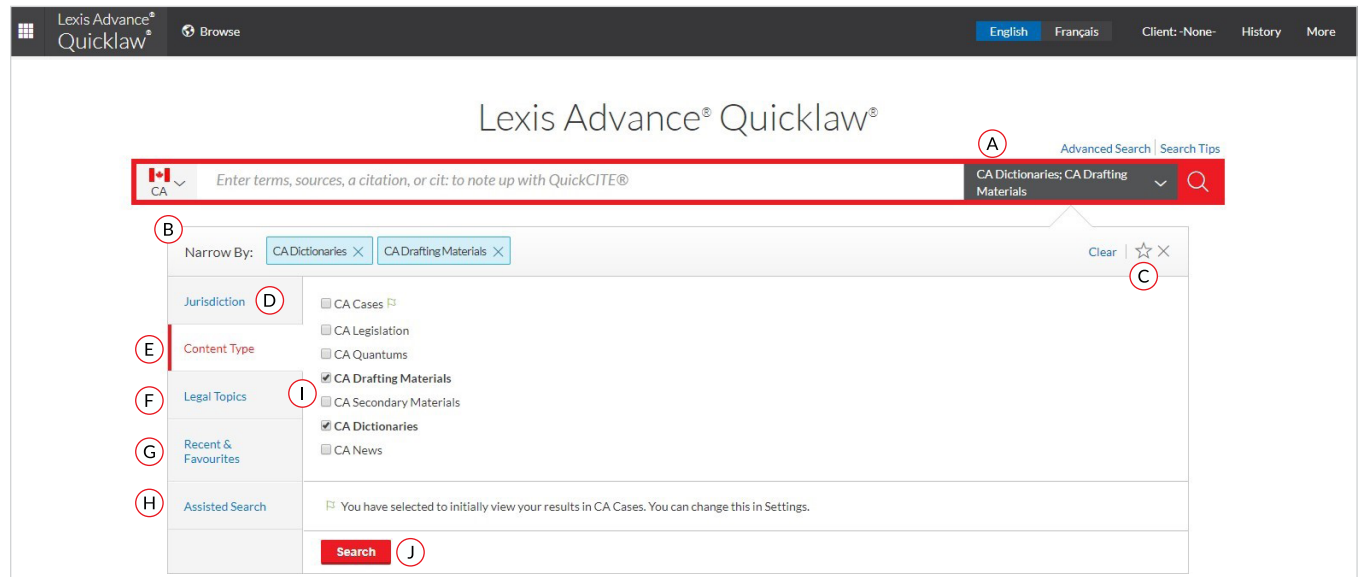
(A) Click the **Search Everything** drop-down menu to add filters. As you add, the filters box displays the number of filters you've selected.

(B) As you add filters across screens, the Narrow By box displays your filter choices. Click the **X** to delete a choice or Clear to remove all choices.

(C) Finished selecting filters? You can save the combination as a favourite and re-use. Click the star to add it to your Favourites list.

(D) To navigate filter choices, simply select a Filter link.

(E) Category options include all content types available (*e.g.*, *choose to search cases and legislation only.*)

(F) Select from more than 50 legal topics.

(G) **Recent & Favourites** options include up to 50 recent and favourite source/sources combinations, recent and favourite filter combinations, and recent and favourite legal topics selected from Browse Topics. Unsave/Remove favorites by clicking on the star shaded in yellow or click on x.

(H) **Assisted Search** helps you select search commands and enables you to link to citation formats for retrieving full-text documents.

(I) **Drafting Materials and Dictionaries** allows you to quickly and easily narrow results to view documents for a specific source within the collection.

(J) Click **Search** to close the Filter Box when you've finished selecting filters.

FILTER: SEARCH WITHIN SPECIFIC SOURCES

By default, the **Red Search Box** searches everything, but it is also easy to locate and restrict your search to a specific source such as a textbook, a tribunal or a volume of Halsbury's.

If you know the source name or partial name, enter it in the Red Search Box.

Ⓐ The word wheel provides suggestions of **Legal Phrases** that you can select to auto-populate the search box and **Documents** relevant to your search terms that you can instantly view from the main landing page.

Ⓑ Select a source title to add to your search.

Ⓒ Select a source's **Table of Contents (TOC)** link to browse the TOC, search the full TOC or select specific parts of the TOC to search and/or deliver.

Ⓓ Select a source's **Get Documents** link to retrieve all available documents for that source. You can then set a Publication Alert to get source updates.

BROWSE SOURCES: FIND SPECIFIC SOURCES TO SEARCH

While the **Red Search Box** helps you to find texts that you already know about, you can use the **Browse** function to discover what other materials might be available for a particular practice area or to find a listing of all news sources or all quantum services just to give a few examples.

(A) Click **Browse**, then select **Sources**. Browse by jurisdiction, content category, practice area or subscription. Or click All Sources to search and browse alphabetically by title.

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

(C) Filter sources by content categories, jurisdictions, etc. Find what you need more quickly by selecting filters (e.g., Cases), then Court Decisions, then select one or more jurisdictions.

(D) Browse All Sources alphabetically. Use this bar first to select a letter, then add content category and jurisdiction filters.

(E) Click a source link and you can:
- Retrieve all available documents for that source
- Add the source to your search
- Set up an **Alert** update to get new releases from that source

(F) Click the information icon to display the source description with details on content, coverage and update schedule.

(G) Clicking on **Table Of Contents** link will provide an e-book version of the source selected.

BROWSE TOPICS: FIND AND SEARCH BY LEGAL TOPIC
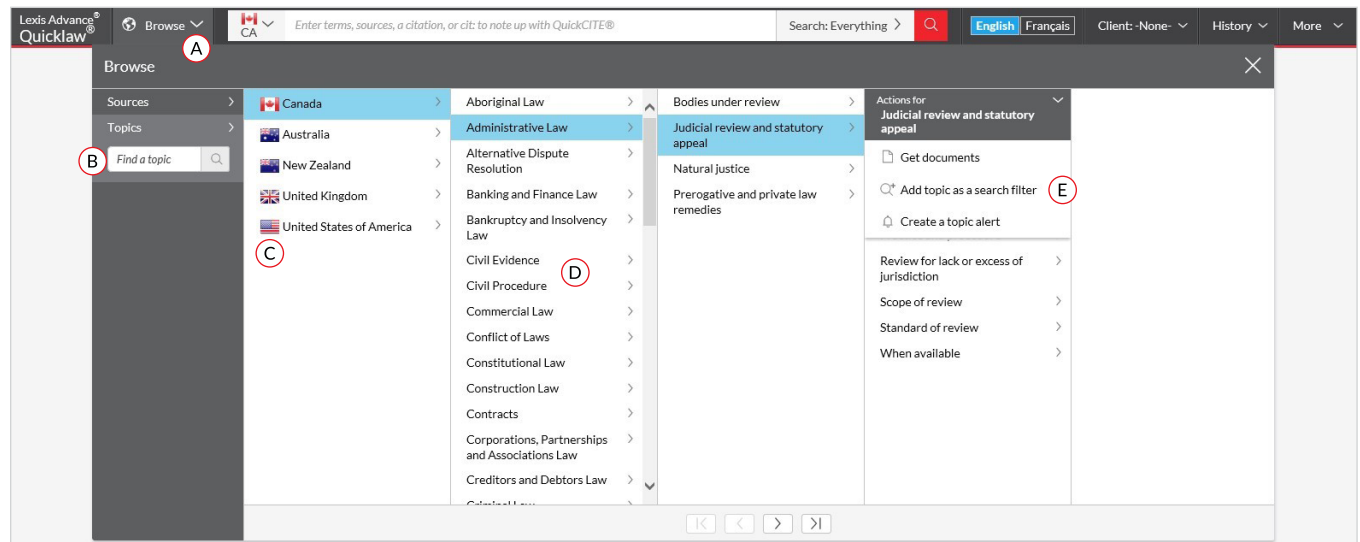
If you prefer to begin your research with a legal topic, start in Browse Topics.

Ⓐ Search for specific topics or browse through the Lexis Advance Quicklaw legal topic hierarchy. Click **Browse**, then select **Topics.**

Ⓑ To search for specific topics, enter your search terms, then click the magnifying glass.

Ⓒ Select the source country.

Ⓓ You can select from more than 50 legal topics. To browse levels in the legal topic hierarchy, select a topic or use the arrows to open or close additional levels.

Ⓔ Use your topic in your research. Once you choose a topic, you can:
- View Lexis Advance Quicklaw search results on this topic, (*i.e., relevant cases or legislation*)
- Add it to a search (and add your own search words)
- Create an Alert. Your topic Alert will be added to your landing page Alerts pod

Legal topics added to your search will be saved in your Recent & Favourites list. To make it a Favourite — and add it to your Favourites pod — click the star next to the topic in the Recent & Favourites list.

SEARCH RESULTS: FIND MOST RELEVANT DOCUMENTS FAST

You have many options for refining and using your search results from this screen:

(A) Set up an **Alert** for your search across content types. To enable the Alert, click the bell next to your search.

(B) Select **Actions** to add a search to a folder, or expand your search or run as natural language or terms & connectors search or create a direct link to your search results.

(C) To see the top relevant results for each content category, click **Snapshot.**

(D) To save to a **Folder**, check the box next to the document title then click the Folder icon to select/create a Folder where you can save the document. When that document appears in future results, the Saved to Folder icon displays. Click the icon for quick Folder access.

(E) **Print, download** or **email** without opening documents. Check the box next to the document titles you need, then click the appropriate icon. You can also create a print-friendly page of your results.

(F) You can sort by document title, jurisdiction, court level, date, cite frequency or citation treatment.

(G) The **glasses** icon marks documents you viewed over the last 90 days. Hover over the icon to see the last viewed date.

(H) Find relevant cases faster by clicking on the bars on the **Search Term Maps** to view the passage without having to leave the results page.

(I) To return to your prior research tasks, click **History** and select a prior search or document.

Ⓙ Refine your search. Need a smaller, more focused results set? Filter by:

- Content category (*e.g.*, *select legislation, secondary materials and more*). Just select a content type.

- Date by sliding the timeline or entering dates.

- Adding more words to your search by entering it under the **Search Within Results** box. If you wish to edit the search terms after you've entered them in, click on the pencil icon.

- Content options (*e.g.*, *refine cases by jurisdiction, court, judge, etc*). Each content category offers different filter options, so you can only filter one content category at a time.

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

Save favourite filter combinations. Click the star and save the combination to your Favourites pod on the landing page.

Ⓚ Click **Note Up with *Quick*Cite** to quickly note up cases and determine the number of cases that were cited.

SNAPSHOT VIEW: VIEW THE MOST RELEVANT RESULTS ON ONE SCREEN

Save time by browsing the most relevant documents retrieved by your search — on one screen — with the **Snapshot View**. Save even more time by using the Snapshot View to manage multiple documents easily by printing, emailing or saving them to Folders.

(A) Scroll and view the **top three results** by relevance for each of the content types.

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

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

FOLDERS: SAVE DOCUMENTS, SELECT TEXT, SEARCHES, ETC.
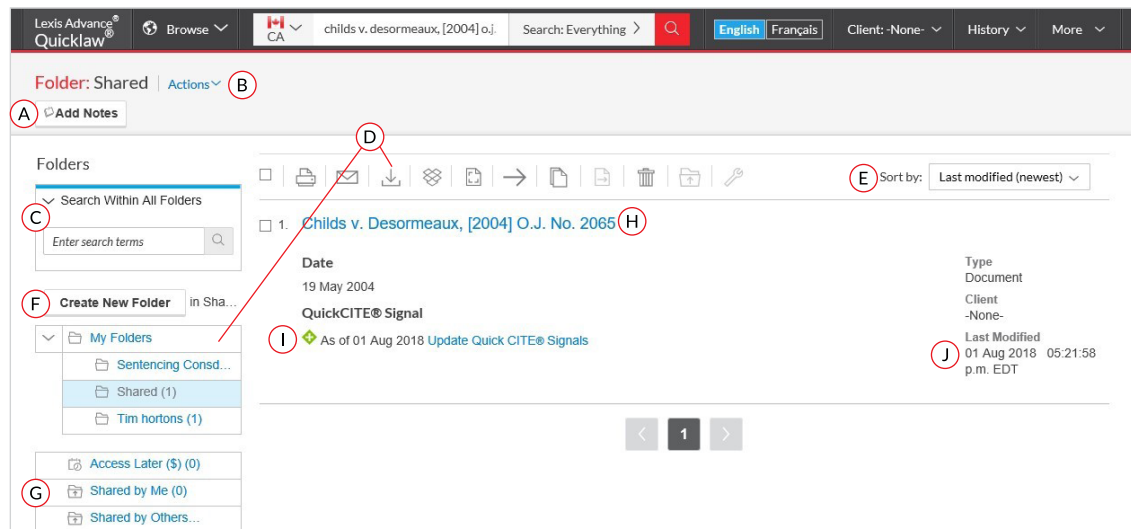
Access your folders from the Folder pod on the landing page or click the More drop-down menu at the top of most Lexis Advance Quicklaw screens and choose Folders.

Save more than full-text documents. Copy and save selected document text, search results lists, effective searches and Research Maps from History PDF documents. Subscription documents stay in Folders until you remove them. If your organization has the Folder sharing option, you can share Folder items or entire Folders and manage access.

(A) **Add notes.** Click and add up to 4000 characters.

(B) To move, copy or delete Folders, click **Actions.** You can also download the Folder, rename it or update all **QuickCITE** Signal indicators.

(C) Find vital facts across all Folders and notes. Just enter your search words (e.g., front pay).

(D) Use Folder listings/documents. Check the box(es) next to the listing(s). Select a delivery icon (*e.g., print*). Select the X to remove the document from the folder, share or manage sharing options, etc.

(E) Re-sort Folder documents by date modified, clients, relevance, type and title.

(F) Create a new Folder or subfolder within a Folder. To create a new Folder in My Folders, click My Folders then the Create New Folder button.

(G) Move among your Folders by selecting a Folder link. Click to open the levels of subfolders. Each Folder shows how many documents it contains. You can also see how many documents you've shared or saved for later purchase.

(H) Click a document listing link and view the full-text search, plus the filters and sources used to get the document. Add Notes to the listing and view who you have shared the document with.

(I) Use **QuickCITE** to ensure documents are good law. Immediately see when a document was checked via **QuickCITE** and update if needed.

(J) Get update notifications. Documents you store in Folders are flagged when updates are available so you can retrieve them.

CASES – GET MORE THAN FULL TEXT

When you view a full-text case, you also have quick access to other vital case-analysis resources available through Lexis Advance Quicklaw, including History of case, citing cases, case summaries, **Quick**CITE, French version of the document (if available), and Commentary referring to the case.

(A) Save the document to a Folder, or print, download, email or generate a printer-friendly version of it.

(B) **Go to** specific document sections, such as keywords, case summary, cases cited, legislation cited, counsel or judgment.

(C) To move among results documents, click Next Document or Previous Document, then use the Results List to move to your results set.

(D) Create a direct link to this page to quickly and easily share your full-text document.

(E) Copy the full-case citation for your work, including parallel citations and a link to the full-text case.

(F) Link directly to various sections of the **Quick**CITE **record, commentary referring to the case** and **case summaries.**

(G) Link to full-text documents cited.

(H) **Highlight** — and use — vital text. When you select a passage, an options box opens that allows you to copy and paste your selection into a Word document along with the included citation. You can **annotate** and save that passage to a Folder or select a passage and search (throughout the entire database) with the selected text.

(I) Enter terms and connectors to search within the document.

(J) View highlighted search results in document by selecting all or individual keywords used.

(K) A **Quick**CITE **signal** appearing next to a case name indicates whether the decision has received positive, negative, cautionary, or neutral treatment in subsequent judgments.

(L) Find relevant cases faster. This feature lets you see the best clusters and the patterns of your search words at a glance. You can click on the bars to view the parts of the document where your search terms are mentioned.

TABLE OF CONTENTS (TOC): SEARCH OR BROWSE HIERARCHICAL SOURCES
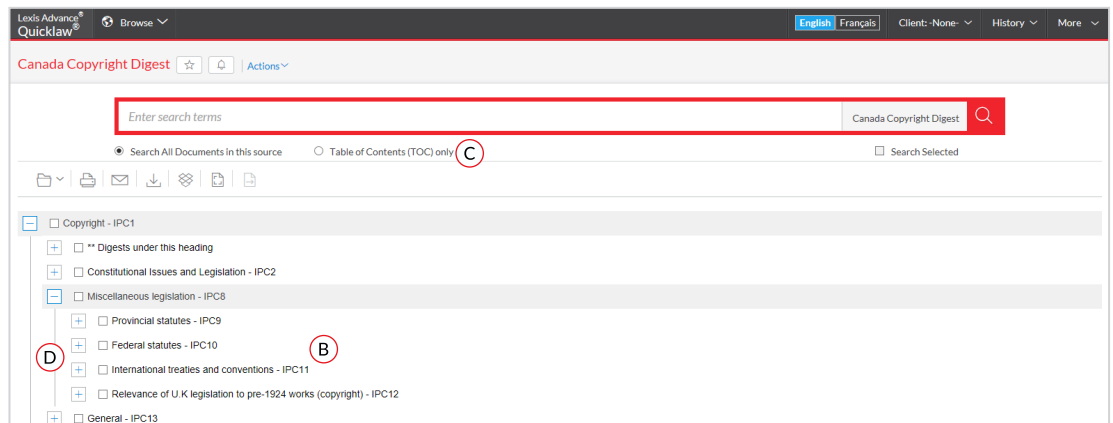
TOC (Table of Contents) sources are available for Lexis Advance Quicklaw in Canada, including legislation, Halsbury's Laws of Canada, court rules, text books, treatises and other secondary sources.

Ⓐ Enter source description or title in Red Search Box.

Ⓑ Select a **Table of Contents (TOC)** title to open the TOC source. To browse the TOC, search the full TOC or select specific parts of the TOC to search and/or deliver.

Ⓒ Search a Table of Contents. Enter your search terms in the Red Search Box. Use the radio button to Search All Documents in this source or Table of Contents only.

Ⓓ Browse the Table of Contents. Open and close hierarchy levels. Click to open or close a chapter.

NOTE UP WITH QUICKCITE®

(A) See treatment indicators up front. **QuickCITE** signal indicators show subsequent treatment at a glance. Clicking the signal redirects to **QuickCITE** Citator.

(B) Navigate quickly to the **QuickCITE** report section that generated the signal:
- History of Case
- Citing Cases
- Commentary Referring to this Case

(C) Get the big picture on Citing Cases. Under **Citing Cases**, you can access and review a graphical representation of citing cases in context by Treatment, Court, Year and Jurisdiction.

(D) Click on the bell icon to create a **QuickCITE** Alert in order to be notified whenever any major revisions are made to the **QuickCITE** citator record.

(E) Go to vital references in one step. Click a grid box and move to those cases in the **List view.**

(F) Click **Court** to view those cases in the List view.

(G) Search Document

(H) Review what each signal indicator means by clicking on the link to **QuickCITE signal help.**

(I) Copy the full-case citation for your work, including parallel citations and a link to the full-text case.

(J) Navigate quickly to the different parts of the *QuickCITE* record.

(K) View by **Court, Year** and **Jursidiction** to further restrict your results within the *QuickCITE* record.

(L) *QuickCITE* features a **List View** which allows you to apply multiple filters for easy navigation on Citing Cases.
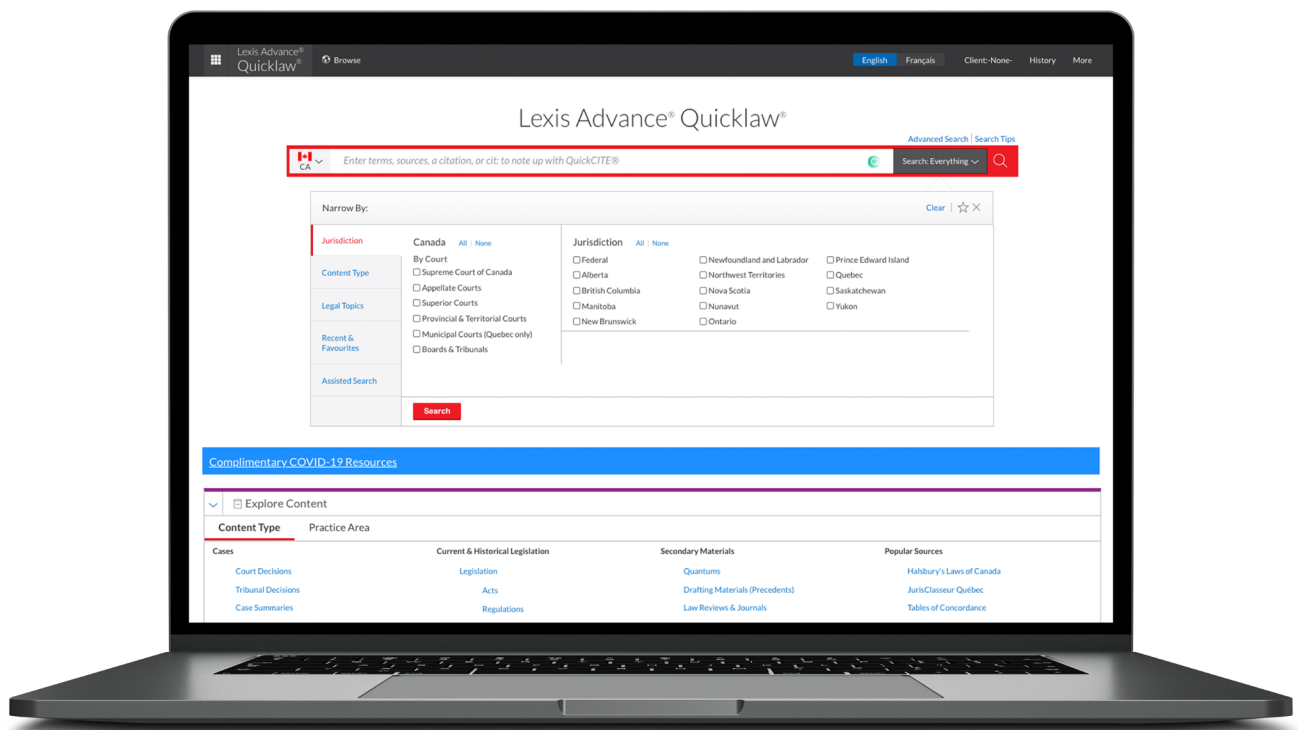
QUICKCITE®: SPOT TRENDS IN CITING REFERENCES (GRAPHICAL REPRESENTATION)

Rarely are cases overruled totally. This grid illustrates how the case you are consulting have been cited in other cases, and the different treatment it received.

Ⓐ Focus on the cases you need by **searching within Citing Cases** by keyword.

Ⓑ Get the big picture in a graphical grid – simply click on a tab to see the overview by **court, jurisdiction** or **year.**

Ⓒ Filter Citing Cases to get vital cases faster. Use the interactive grid to refine your results by specific treatment, court, time frame or jurisdiction, and view those cases in the **list view.**

Access vital references in one step by clicking a grid box to move to those cases in the List view. Filter by analysis phrase, jurisdiction or year (e.g., click positive treatments in the Alberta Court of Appeal to view those cases in the List view).

Ⓓ Click the **CLEAR** button to clear your filters and get back to the full list of all citing cases.

Ⓔ Sort the list of citing cases by date, court, signal or treatment.

Ⓕ See how citing cases have been treated subsequently by viewing their *Quick*CITE signal indicators.

QUICKCITE® SIGNALS

A **Quick**CITE signal appearing next to a case name indicates whether the decision has received *positive*, *negative*, *cautionary*, or *neutral treatment* in subsequent judgments. The signal is a summary of the annotation information available from the list of appeal proceedings and cases referring to this case, and it also provides a link to the corresponding **Quick**CITE **record**. Keep in mind that not every case has a *Quick*CITE signal.

A **Quick**CITE signal appearing next to a statute or regulation name indicates a **Quick**CITE **legislation citator record** is available.

SIGNAL	SUMMARY	EXPLANATION
C	Case citation information	A case citation information signal indicates a case citator record is available, but no known history or treatments. Select the signal to view the case citator record.
✚	Positive treatment	A positive (green) signal indicates the decision has positive history (affirmed, judicial review denied, or leave to appeal refused by a higher court) or positive treatments (followed or followed in a minority opinion of by subsequent court).
⚠	Cautionary treatment	A cautionary (yellow) signal indicates the decision has been subsequently distinguished by a subsequent court.
✖	Negative treatment	A negative (red) signal indicates the decision has a negative history (judicial review allowed, reconsideration allowed, reversed, quashed, or varied by a higher court) or negative treatments (not followed or questioned by a subsequent court).
◉	Neutral treatment	A neutral signal indicates the decision has neutral treatments (mentioned, explained, cited, or cited in a dissenting opinion) or has history (abandoned, abated, leave to appeal granted, reconsideration denied, related proceeding, same case, or supplementary reasons by a subsequent court) where the citing court does not comment on the case. Note: A neutral signal is also given to cases that have been added to Lexis Advance within the past 3 business days, but which have not yet been assigned a *Quick*CITE treatment.
L	Legislation citation information	A legislation citation information signal indicates a legislation citator record is available. Select the signal to view the legislation citator record.

DELIVER: PRINT, DOWNLOAD AND EMAIL

Use the same, easy-to-remember delivery icons in the same screen locations across Lexis Advance Quicklaw. Look for these icons at the top of your results lists, TOC (Tables of Contents) pages and full-text documents. Please note that icon configuration may vary slightly depending on the page you are viewing.

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

To deliver:

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

Multiple documents: Select the check box(es) next to the document(s) in a results list, even moving among content types. Select multiple documents from a TOC display. The red box with the delivery icons keeps count for you. Then select a delivery icon and choose delivery options. No need to open documents to deliver.

Lengthy documents: Delivery icons "float" and stay onscreen as you scroll multiple-paged, full-text documents such as cases. Deliver quickly, without having to scroll back to the top of the screen.

Lists: Print your results list, *Quick*CITE document and lists of your Folder documents or Alert searches. You can even deliver your Research Map. You can also use the Printer-Friendly View icon, shown above, and your own device print functions to print your research History List, and *Quick*CITE records, including graphical display of citing references.

Documents to Dropbox: This functionality is widely available.

FOLDER OPTIONS

Save time by saving content to folders directly on the Lexis Advance Quicklaw research platform or work collaboratively by sharing the files with other members of your firm or organization. The Folders option enables you to create folders in which you can store searches, individual documents, and selected document text.

PRINT OPTIONS

Basic: Select a printer attached to your device. (Note: You will have to install the print/download utility software on initial selection.) Identify or verify the documents or items you want to print. See: http://help.lexisnexis.com/tabula-rasa/newlexis/attachprintips-field?lbu=CA&locale=en_CA&audience=all.

Formatting: You can select fonts, choose to have search terms in bold, exclude the cover page and other options. You can even print highlights and notations.

Content-Specific: Select fonts and search terms in bold, insert a cover page, or choose many more options such as including Signals, and where applicable, the History and the Citing Cases.
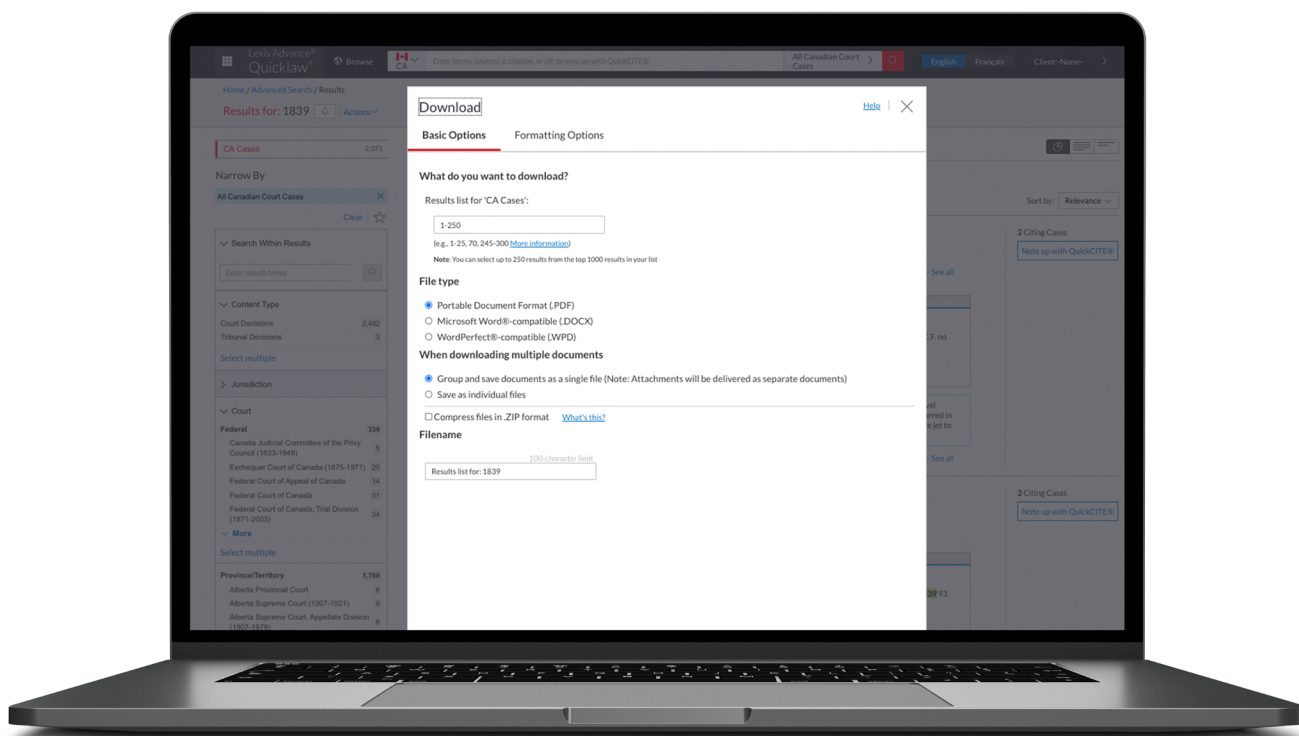
DOWNLOAD AND OPTIONS   SEND TO DROP BOX

Basic: Send as PDF, Docx, WordPerfect® or to other software. You can also Group and compress files by simply selecting file name and destination. (If you do not see the Dropbox icon in your delivery options, check with you Lexis Advance Quicklaw Administrator or your LexisNexis Representative).

Formatting: You can include a cover page, LexisNexis logo, your first and last name to the document, page numbers, weblinks to references, and any highlights and annotations you made. You can also select font type, size and styling.

Content-Specific: You can include QuickCITE signals for cases and legislation. For legislation, you can include History and Notes (legislation only). From the QuickCITE case record, you can also include History of Case, Citing Cases and Commentary referring to this case. From the QuickCITE legislation record, you can include Citing Cases.

EMAIL OPTIONS

Basic: Send as PDF, .Docx, .WP or send to CaseMap. You can also group and/or compress files. Then, simply add recipient addresses, subject and message.

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

Content-Specific: Select fonts and search terms in bold, insert a cover page, or choose many more options such as including Signals, and where applicable, the History and the Citing Cases.

GET UPDATES AUTOMATICALLY: CREATE AN ALERT

To set up an **Alert**, look for the Alert "***bell***" icon. You will find it at the top of many screens when you are conducting tasks that may require updates. You can create the following types of alerts:

- Search Alert
- *Quick*CITE Alert
- Topic Alert
- Publication Alert (From Explore Content, Browse Menu, Results List)
- Compare Search Results (Research Map)
- Find Similar Documents Alert (Research Map)

To create an **Alert:**

- Select the **Alert** icon and then choose your update options.
- Move through the options screens in seconds, selecting just what you need.
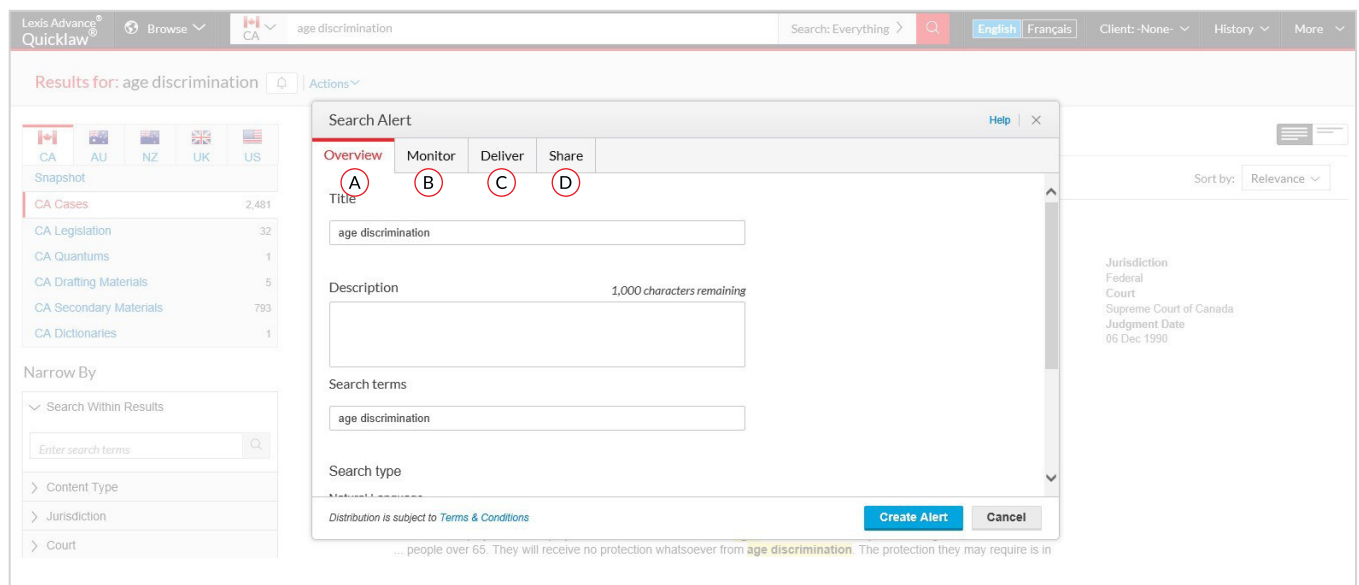
(A) **Overview Options:** Select an Alert title, review/edit search terms and select a client matter (optional).

(B) **Monitor Options:** Select specific content types the alert will monitor. Select the checkbox of each content type you want the alert to search.

(C) **Deliver Options:** Select start and end dates of the alert, online or email & online delivery as well as the update frequency. Choose the delivery day and time, or select "as updates are available" to get Alerts as they are released.

(D) **Share Options:** Add email addresses so colleagues also receive the Alert updates. (Note: Sharing may not be included with your subscription.)

GET UPDATES AUTOMATICALLY: VIEWING ALERTS

View Alerts results

Alerts results are delivered to your email inbox (when email & online is selected), allowing you to view search terms to determine relevance. You can then select documents, review and use internal document links to navigate to other relevant documents.

You can also view all your Alerts and check for updates from the Lexis Advance Quicklaw home page. Check the Alerts pod for blue buttons with numbers inside indicating number of new documents.

To view an alert, click on it from the Alerts pod. To move to your Alerts management screen, click **View all alerts** button or click **More > Alerts** from the top right-hand corner.
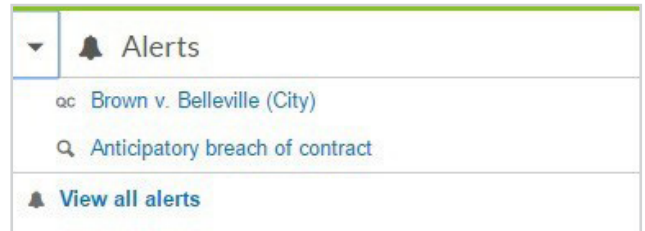
Manage Alerts:

(A) Filter results by search terms, Client ID, delivery type and frequency.

(B) Use the icons to:
- Select multiple Alerts for edits
  As you select, the items are highlighted
- Start Alert updates again after pausing
- Pause the Alert updates
- Delete the Alert updates

(C) Mark results as read, delete all results quickly or browse results in printer-friendly view.

(D) Edit search terms, change delivery frequency or content, and other options.

(E) Open your Alerts results list by selecting the Alert title link.

HISTORY: VIEW SEARCHES AND MUCH MORE IN THE LIST VIEW

View your entire **search history** from the past 90 days. You can open documents by **type**, such as *Quick*CITE records, or view all documents delivered. You can also view your search history in a list view or as a graphical research map. Pick-up interrupted research easily by referring to your **History/Research Map**, and see your **Search History** to save useful searches to your **Folders.**

Ⓐ Return to a past search easily. Select from the five most recent searches or documents from the **History** pod on the landing page, or click **History** in the black header bar. Link to your complete History list by selecting **View all history.**

Ⓑ The **List** view is the default view.

Ⓒ View your search history in a *graphical map* by clicking **Research Map**.

Ⓓ Get a *printer-friendly* list of searches.

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

Ⓕ Filter your **history** to display by date or date range, client or task type. Only dates with research are included. When you select how you would like to refine your search, the filter displays in blue under **Narrow by**. To remove the filter, simply click the **X** in the blue box.

Ⓖ See extensive search details up-front, such as content categories, search type and more.

Ⓗ Return to your search by clicking the search title.

Ⓘ **Results Summary** - View the total number of documents retrieved for all high-level content types including L*egislation*, *Cases*, *Quantums*, *Drafting Materials*, *Secondary Materials* and *Dictionaries* regardless of whether this content was viewed or accessed when the search was originally executed.

HISTORY: USE THE MAP TO EXPAND YOUR RESEARCH

(A) Get a step-by-step graphical depiction of your research. Click **Research Map** to identify explored versus non-explored paths, possibly uncovering other relevant results.

(B) Learn more about *map icons* and graphical trails.

(C) Add your **History Map** to one of your **Folders** or create a new one.

(D) Share your **History Map** via email, *download* it or *print* it.

(E) *Compare* two or three search results to find common documents — and perhaps expand your research. Click a *map search icon* and select **search** to compare results.

(F) Find similar, relevant documents by clicking a *document icon in your map* and **Select Document**. Then **Find Similar Documents.** This is a fast way to compare relevant documents and to find ones you may not have reviewed yet.

(G) **Filter** by *client, date, etc.* and search for words included in your map. You can also exclude specific searches/trails on your map or change the trail order. Click **Reset map to default view** to clear filters.

(H) Click a *map icon* and choose to *re-run* your search or *save* a *search* to a **Folder**.

(I) Clicking on the **magnifying glass** allows users to see the total number of documents retrieved for all high-level content types, regardless of whether this content was viewed or accessed, when the search was executed.

COSTS OUTSIDE OF YOUR SUBSCRIPTION

Documents outside your subscription are clearly marked and cannot be accessed unless you take active steps to purchase them.

Screens shown here are examples; they do not reflect current Lexis Advance Quicklaw prices.

Selecting out-of-subscription sources

From **Browse Sources** screens:

You can search for a source with one asterisk at no charge, but you will incur document-access charges if you select documents from the *results screen*. Sources with two asterisks and a grayed-out source name cannot be added to your search.

***Out-of-plan* documents in search results**

All *out-of-subscription* documents are marked with a **"Get It Now!"** icon. To help you make a purchase decision, you can *view your search words* in context and see the applicable cost. Documents available at a special price include a Save! icon. (Not shown.)

You can only access the document via the **Get It Now!** link; the document title is not linked. You can also save the document to a **Folder** and purchase it later. There is no charge to hold an out-of-plan document in a **Folder**. Click the **checkbox**, then the **Folder** icon and make your Folder selection.

Linking to out-of-plan documents

From **Browse Sources** screens:

If you click an embedded link (i.e., attempt to link from a full-text subscription document to an out-of-plan document), you are notified and can *cancel* the task, *save*, or *purchase* the document.

Additional Charges Will Apply
This material is not included in the flat rate plan for this ID

List Price:$8

Client ID: -None-
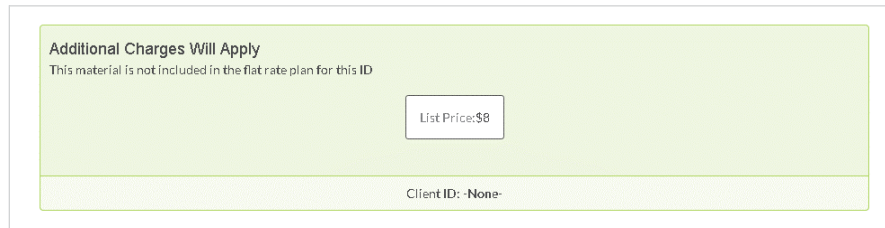
Reminders on documents you purchase

Once purchased, non-subscription documents can be used for 90 days, or for one year if the document is saved to a **Folder**. Lexis Advance Quicklaw shows you the expiration date on:

Full-text documents in the **About This Document** box

About This Document

Accessed ($) - This document is available
until 12 May 2020

Source Information

Art Law Deskbook
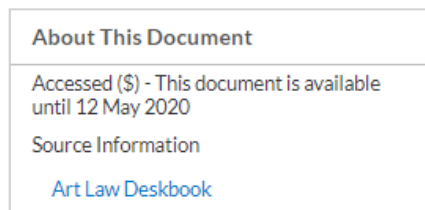
Search results listings showing that document

History lists displaying that document

Folder listings for that document. Updates to that *Folder document* during the year you use the document are included in the purchase price.

Accessed ($) - available until 12 Feb 2021
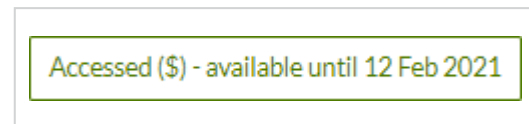
APPENDIX

PMF: PLEADINGS, MOTIONS AND FACTA

With the ability to access quality court documents, users can save time and build stronger arguments faster. Access **Pleadings, Motions and Facta** documents from cases from the last 5 years, carefully curated by our experienced internal lawyers and legal editors.

Research and leverage the arguments and materials from previously decided cases that achieved their desired outcomes, providing you the ability to:

- Assess the strength of your case early-on
- Understand the legal arguments that have led to the desired outcomes
- Draft better pleadings, motions, facta and other litigation-related documents for stronger arguments
- Conduct due diligence to ensure you have not missed anything in your argument.

Searching Pleadings, Motions and Facta

① **Red Search Box**

From the Word Wheel
You can quickly access Pleadings, Motions and Facta using the **Red Search Box**. Simply type in the name of the jurisdiction followed by the content type (*e.g. Alberta motions*) and select *Add Source as a Filter* from the word wheel to search our collection of materials narrowed by document type (i.e. motions) and jurisdiction.
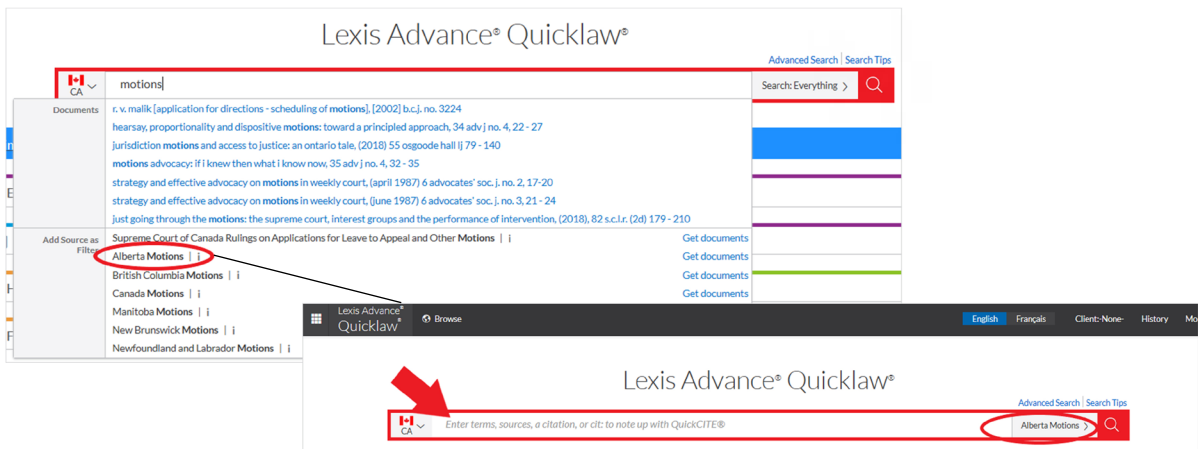
PMF as a Pre-search Filter

After entering your search terms into the Red Search Box, you can choose to narrow your search to retrieve only Pleadings, Motions and Facta documents related to your search terms by adding *CA Pleadings, Motions and Facta* as a pre-search filter.
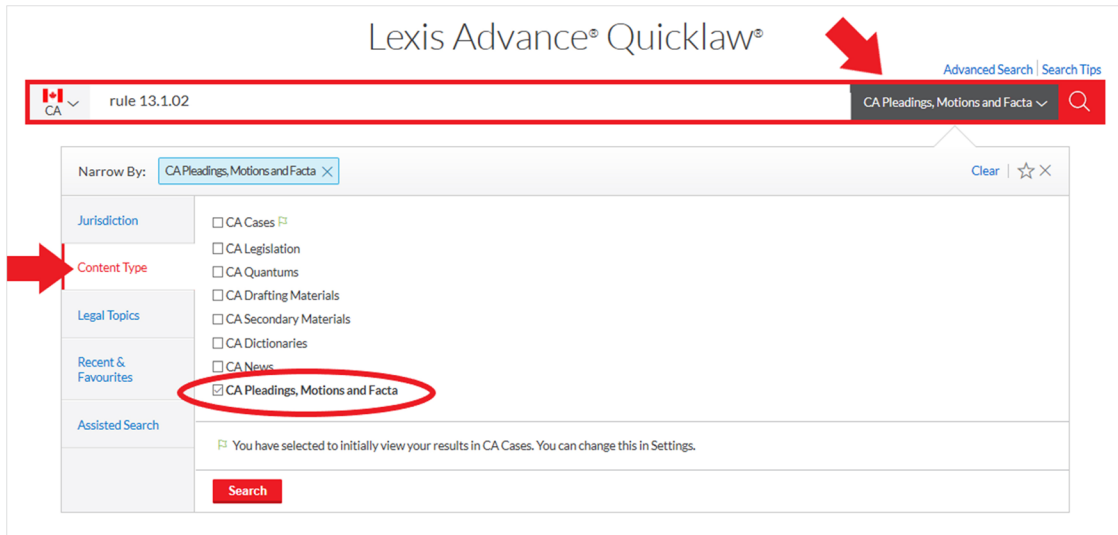
The results page includes key words in context and additional details regarding the document which allow you to glean an understanding of the specific document before opening it. This lets you easily identify the documents relevant to your research without having to open every document on the list.
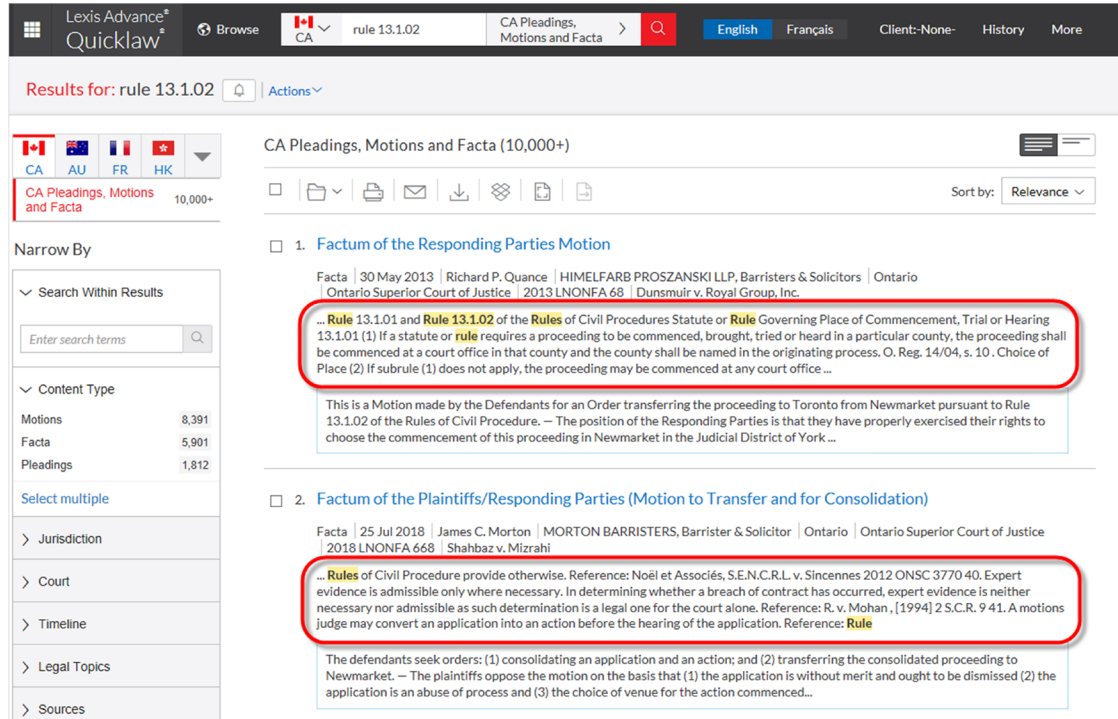
② **Browse Pull-Down**
You can also access Pleadings, Motions and Facta content using the **Browse** pull-down.

To browse by **Source**, go to *Sources > Canada > By Category > CA Pleadings, Motions and Facta*
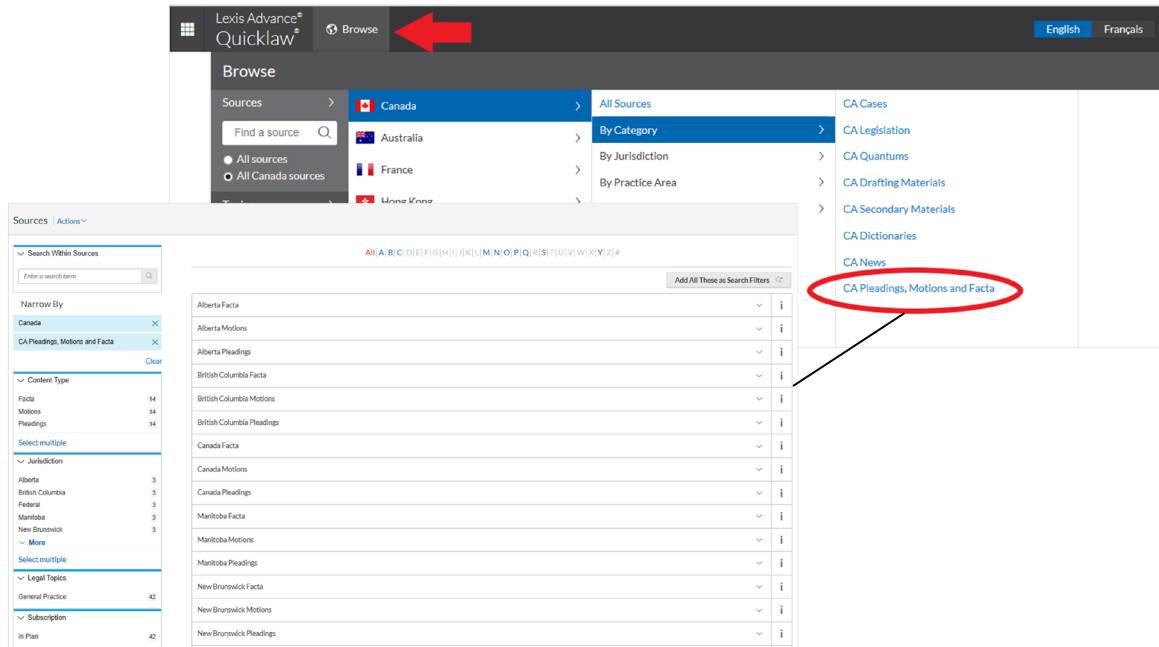
To browse by **Topic**, go to *Topics > Canada > Practice Area > Topic > Get Documents*

(*e.g. Topics > Canada > Civil Procedure > Common Law Jurisdictions > Estoppel > Get Documents*)
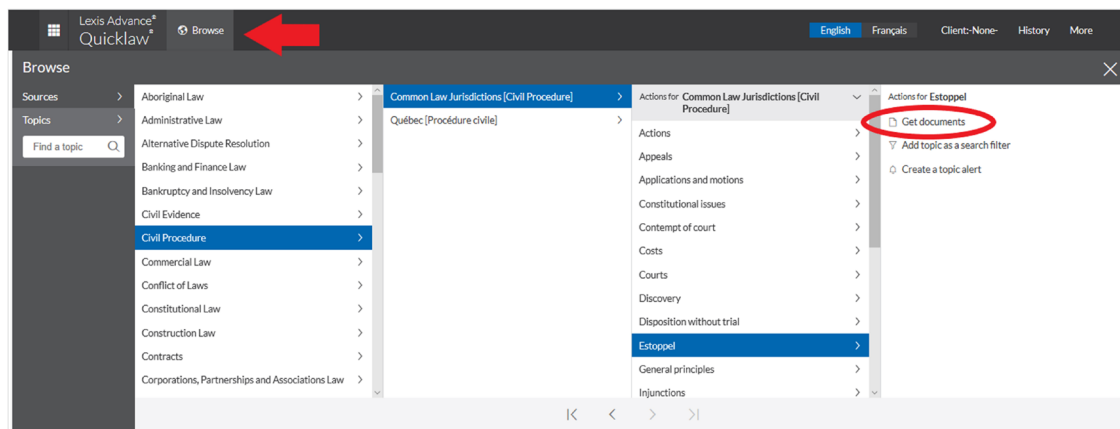
On the results page, select **CA Pleadings, Motions and Facta** under the list of content types to get PMF documents related to the selected topic.

③ **Case View**

When viewing a case document, you can quickly and easily access the associated Pleadings, Motions and Facta documents, if available, by clicking on the right-hand side links under *Related Court Materials*.

Access to Original Source Image

When viewing a pleading, motion, or factum document, click on **Original Source Image** under *About this document* on the right side to access the actual scanned images of the document in court.

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Please note: Lexis Advance Quicklaw is continually evolving, so actual screens and features may vary slightly from those displayed here.

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