

# LexisNexis Newsdesk™

## Quick Start Guide



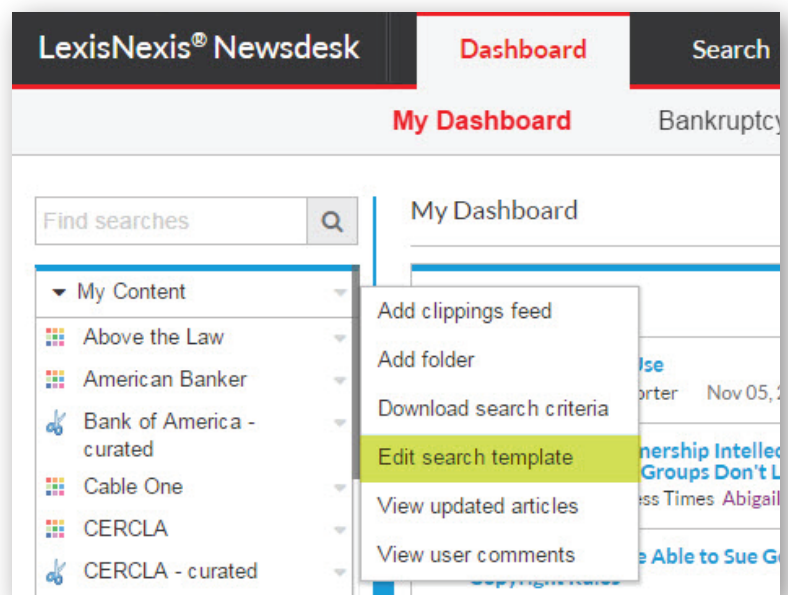
Welcome to LexisNexis Newsdesk™. We've created this Quick Start Guide to aid you in getting started with your LexisNexis Newsdesk exploration, but there are many more features and functions available to you. For more in-depth information, click on the drop-down arrow underneath your name in the upper right-hand corner and click on the "Help" tab.

Now, let's get started:

### Creating the news feed

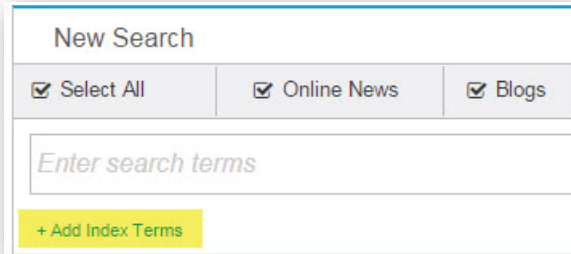
#### 1. Setting up the search template (You only have to do this once!)

- Click on down arrow to the right of "My Content." Click on "Edit Search Template"
- At the top, click on "Select All" to search all content types.
- You'll see a series of tabs at the bottom. Don't put anything in *Emphasis* because it will be required for all future searches.
- Languages: Choose "English."
- Duplicates: Choose "Exclude duplicates based on content and headline."
- Hit "Save."
- And then hit "New search" to exit template. You'll see "New Search" in the upper left hand corner and you'll know that you have exited the template.



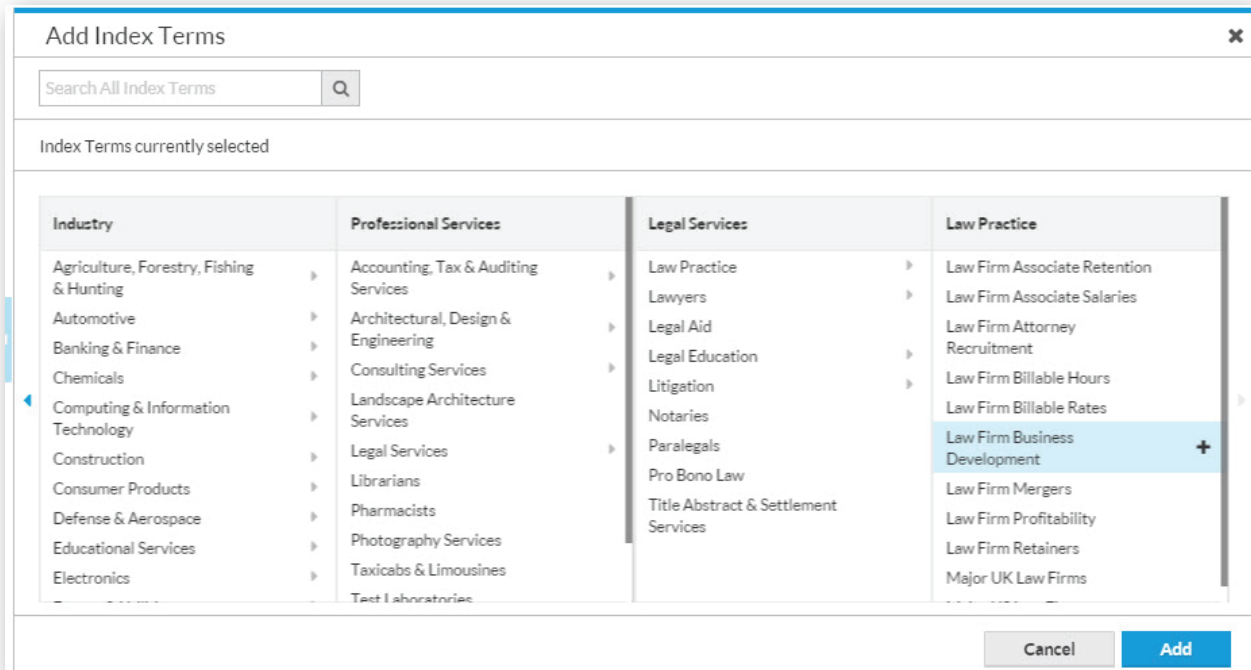
## 2. Constructing a search

- Construct your search, referring to the *Most Used LexisNexis Newsdesk Search Commands* handout for syntax. *(It's different from other Lexis® products!)*
- LexisNexis® SmartIndexing Technology™ is now available at the start of your search. To access, click on “+Add Index Terms” below the search box.



The image shows a 'New Search' dialog box. At the top, it has the title 'New Search'. Below the title are three checkboxes: 'Select All', 'Online News', and 'Blogs', all of which are checked. Below these checkboxes is a text input field with the placeholder text 'Enter search terms'. At the bottom of the dialog box is a yellow button labeled '+ Add Index Terms'.

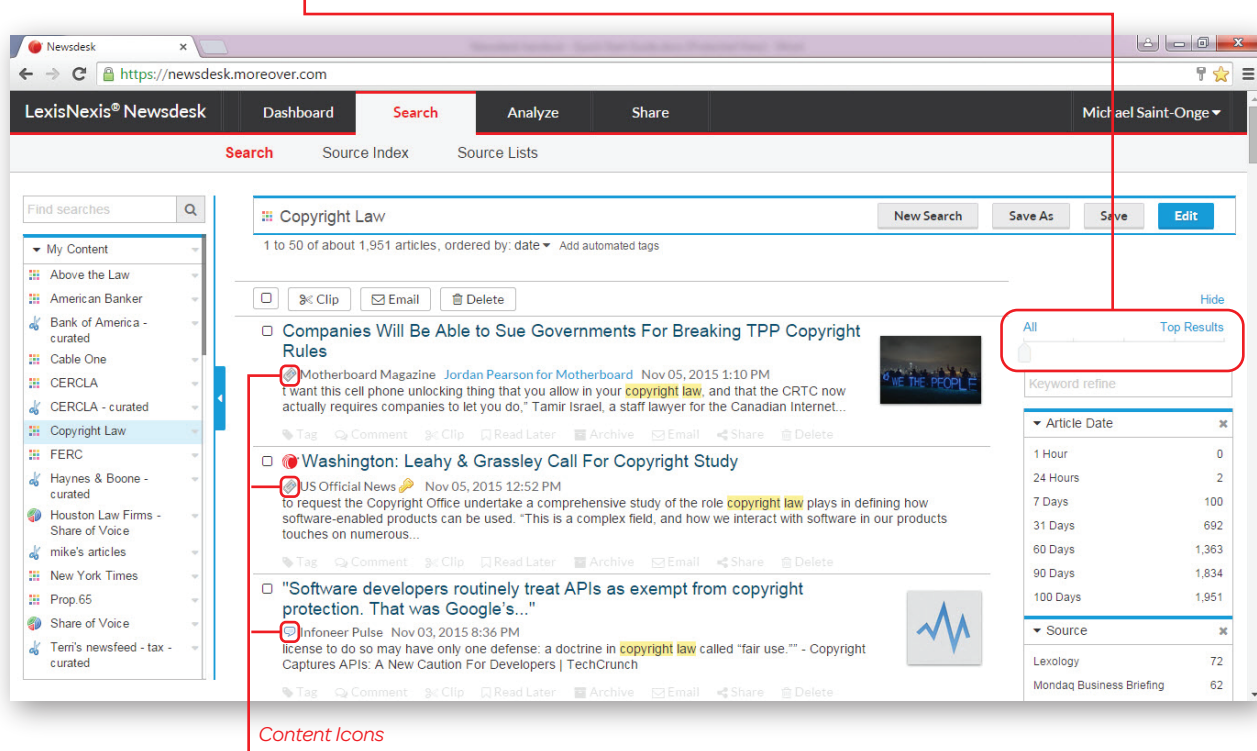
Simply follow the hierarchy until you find the specific term of interest and clicking the “+” and then “add” to the search box. Note that you can move up and down the hierarchy to search as broadly or as narrowly as you’d like.



The image shows the 'Add Index Terms' dialog box. It has a search bar at the top labeled 'Search All Index Terms' with a magnifying glass icon. Below the search bar is the text 'Index Terms currently selected'. The main area of the dialog box is a tree view with four columns: 'Industry', 'Professional Services', 'Legal Services', and 'Law Practice'. The 'Law Practice' column is expanded, showing a list of terms including 'Law Firm Associate Retention', 'Law Firm Associate Salaries', 'Law Firm Attorney Recruitment', 'Law Firm Billable Hours', 'Law Firm Billable Rates', 'Law Firm Business Development', 'Law Firm Mergers', 'Law Firm Profitability', 'Law Firm Retainers', and 'Major UK Law Firms'. The 'Law Firm Business Development' term is highlighted in blue and has a small '+' icon next to it. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Add'.

Industry	Professional Services	Legal Services	Law Practice
Agriculture, Forestry, Fishing & Hunting	Accounting, Tax & Auditing Services	Law Practice	Law Firm Associate Retention
Automotive	Architectural, Design & Engineering	Lawyers	Law Firm Associate Salaries
Banking & Finance	Consulting Services	Legal Aid	Law Firm Attorney Recruitment
Chemicals	Landscape Architecture Services	Legal Education	Law Firm Billable Hours
Computing & Information Technology	Legal Services	Litigation	Law Firm Billable Rates
Construction	Librarians	Notaries	Law Firm Business Development
Consumer Products	Pharmacists	Paralegals	Law Firm Mergers
Defense & Aerospace	Photography Services	Pro Bono Law	Law Firm Profitability
Educational Services	Taxicabs & Limousines	Title Abstract & Settlement Services	Law Firm Retainers
Electronics	Test Laboratories		Major UK Law Firms

- Once you've retrieved results, you can review them in the main screen. You can tell what type of content it is by the icons (news, blog, broadcast, etc.) Make a note of any false hits. This will help you figure out which sources are on point and which are not useful. You can also delete from the feed any stray results that you don't want. This removes these permanently from this particular feed.
- Use the Relevancy Slider to automatically boost relevancy.



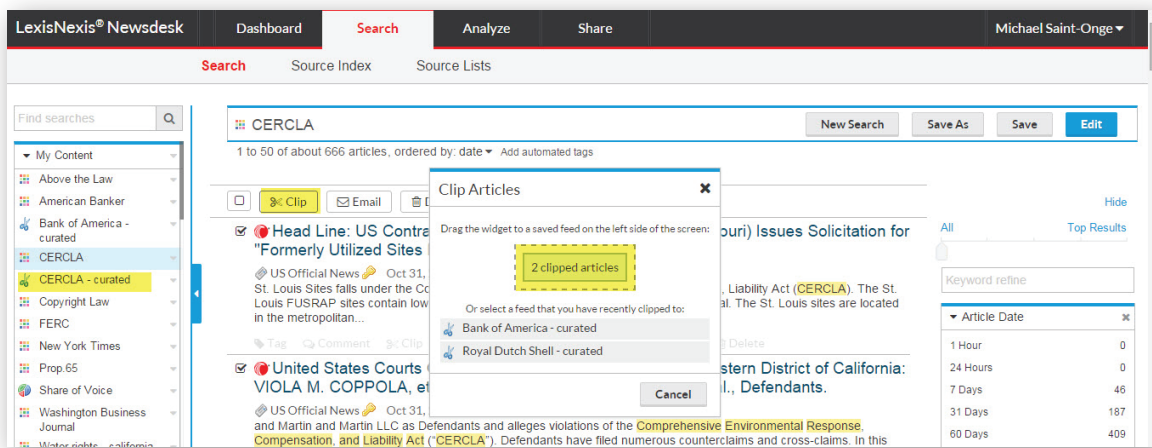
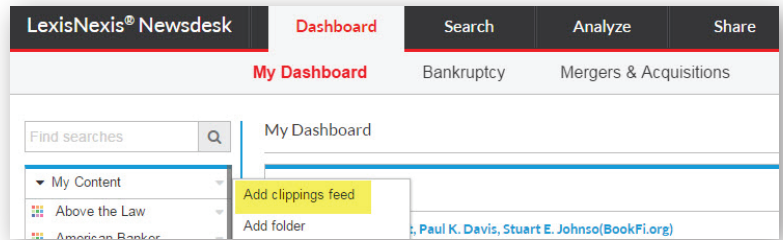
Content Icons

- Favorite facets: *(There's a full description of the various facets under the help screen, #6)*
  - Sources
  - Source Rank
  - Platform
- To eliminate unwanted entities, click on the entity twice and it will turn pink. Go ahead and click on all the entities you'd like to exclude and then hit "refine". This will remove these entities from the newsfeed permanently when you hit save.
- If you'd like to restrict your results to particular entities, click on those entities once. They will turn blue. If you save your results, these will be the only entities you'll see in your newsfeeds going forward.
- You can move the facets around by dragging and dropping, and hide any facets you don't want to see by clicking on "X" on the righthand side.
- Once you've refined the search to get the most relevant results, click "Save". You'll have the option to save it under "My Content" or "Shared Content" or any other setup you've configured. You've now created a newsfeed that will continue to return results that meet your search criteria.

Source	Count
Mondaq Business Briefing	64
Lexology	63
Mondaq	59
Wind Watch.org	59
MyInforms	55
Techdirt	38
JD Supra	37
Scribd	24
Before It's News	22
Complete Music Update	21
More	
Refine	Clear

### 3. Setting up a Clippings Feed

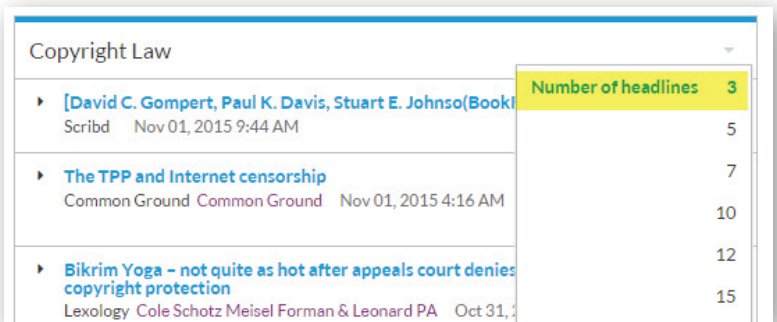
- If you would like to create a curated feed, meaning that you would rather pick and choose which articles to add to the newsfeed, you'll need to set up the clippings feed first.
- Click on the down arrow to the right of "My Content" and click on "Add Clippings Feed"
- Give it a name that indicates that it is a curated feed – different from a straight newsfeed, and hit "Save." This is an empty bucket, waiting to be filled.
- Return to your regular newsfeed, and click on the articles you'd like to choose for your curated news feed. Once you've chosen the articles, click on "Clip" and a pop-up window will appear. Just drag the widget to the saved curated feed on the left side of the screen.



- You've now saved the articles you've chosen. You can then add the curated feed to the dashboard or share with others.

### Saving Newsfeed to Dashboard

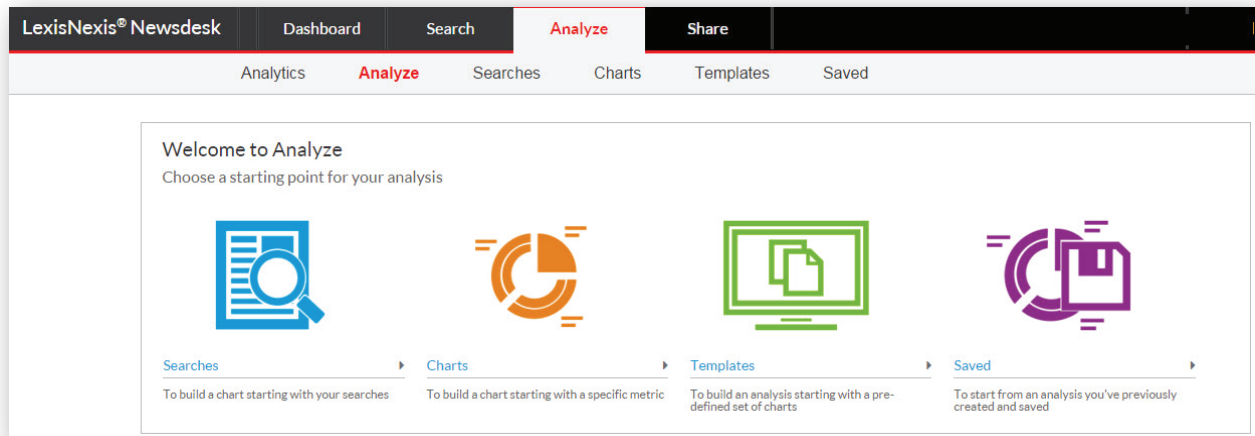
- To pull the newsfeed into the Dashboard, simply drag it onto the dashboard screen. You can only drag newsfeeds from "My Content" on "My Dashboard" and "Shared Content" on the "Shared Dashboard" – to prevent users from accidentally sharing their content with everyone. If you'd like to transfer the newsfeed to the alternate category, (my content to shared content, for example) just drag it to the other category on the left-hand side, and it will be added to that category. Once you've done that, you can pull it onto the appropriate dashboard.
- You can move the pods around, and decide how many headlines you'd like to display by clicking on the dropdown and choosing any number between 3 and 15.



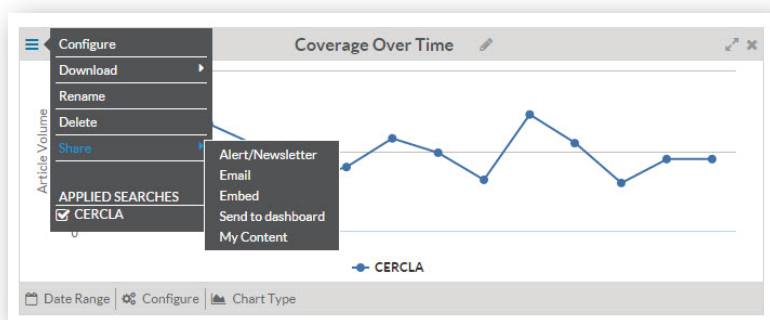
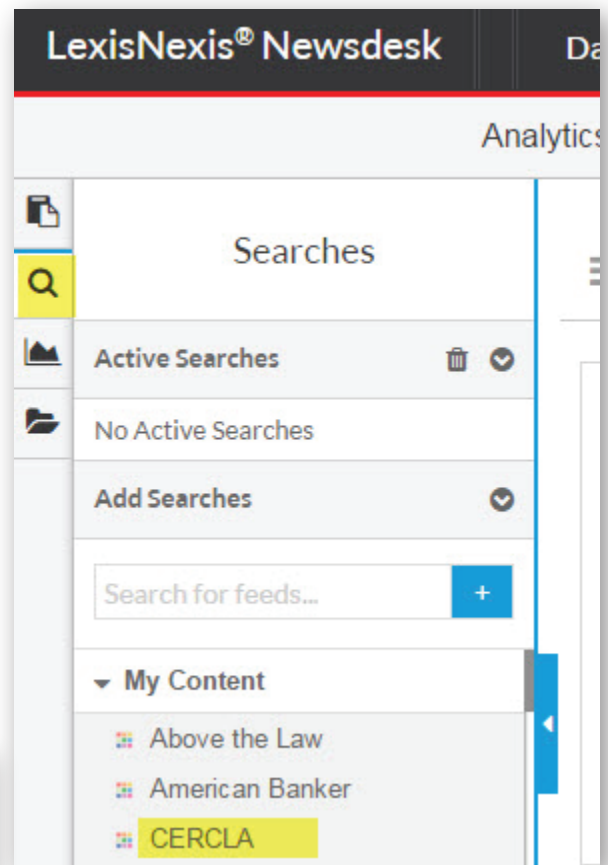


## Creating Analytics

1. Once you've created a newsfeed, you can use "Analyze" to represent the data visually. The easiest way is to begin with the chart of interest. Click on the "Chart" icon to begin.



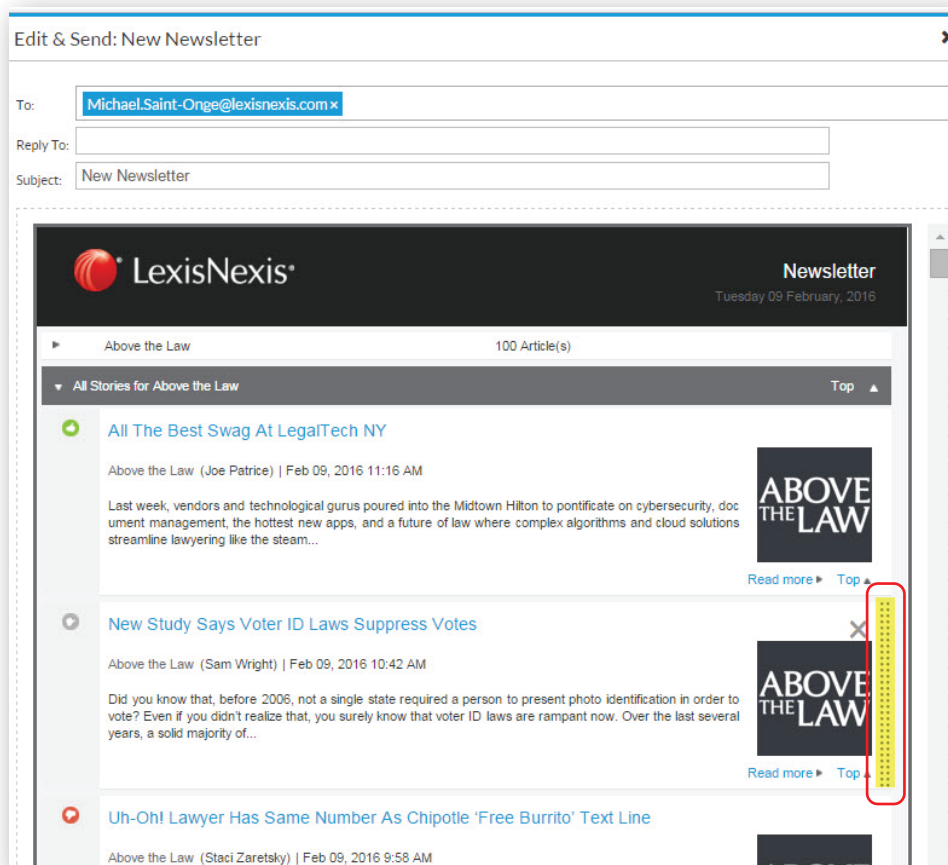
2. Choose the chart that will represent the newsfeed best by clicking on the name. It will then appear on the right-hand side. (You can always change the chart to see the different options.)
3. Click on the magnifying glass icon on the left to choose the newsfeed you want to analyze.
4. Clicking on the newsfeed adds it to the "Active Searches" on the left; simply pull it into the chart itself. If you've chosen more than one chart, and you want to add it to all the charts, pull it into the title "Unsaved Analysis."
5. Hover your mouse over the chart until the bottom toolbar appears, and then click on "configure" to add the appropriate data labels to the chart. Just slide the indicator all the way to the right. Choose the appropriate "value" you'd like to display.
6. Choose the appropriate date range by clicking on that option in the lower bar.
7. Save the chart by clicking on the "Save" icon in the lower left hand corner and giving it an appropriate name.
8. To share, click on the stack icon on the left, and choose where you want it to be shared.



## Sharing Your Results

There are three different ways to share your result under the “Share” tab: See “#10: The Email Tab” under the help screen for more information.

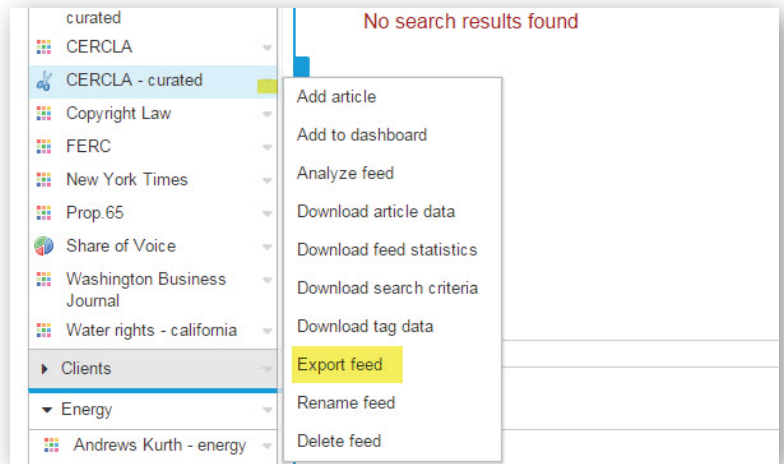
- Alerts:** Email alerts are simple emails that contain the results from selected newsfeeds. (For more visually-pleasing emails, try using the Newsletter feature.)
  - Click on the Share tab, then click on the Alerts subtab, and click on “New Alert” in the upper right-hand corner.
  - Fill out the template. Add the newsfeeds/charts to your alert by clicking on the name of the newsfeed on the left and dragging it to the Feeds/Charts field. You can add multiple feeds one-at-a-time.
  - Set up the desired delivery time by using the drop-down. Note that you can add multiple delivery times by clicking on the “add” button next to the Automatic dropdown. You can even have results delivered up to every 15 minutes – a great way to keep up with breaking news on a client. Remember, LexisNexis Newsdesk will only send new results, so if there aren’t any new results under that topic, an alert will not be sent.
- Newsletters:** Newsletters (with your firm’s logo and desired color scheme) are an effective way to deliver multiple newsfeeds in an easy-to-read format.
  - Click on the Share tab, then click on the Newsletter subtab and click on “New Newsletter” in the upper right-hand corner.
  - Drag the newsfeed into the Feeds/Charts field. If you pull in more than one newsfeed, it will automatically create a table of contents.
  - Clicking on “Edit Newsletter” in the upper right-hand corner will allow you to add a header or footer, select color scheme, etc.
  - While using the “enhanced HTML” layout available on the new newsletter screen, you have the ability to rearrange articles within the newsfeeds by clicking on the article itself. A dotted line will appear on the right, which indicates you can now move this article by clicking on the dotted line and dragging the article up or down as desired. (See illustration below)



- You can send a test email, or schedule it for regular delivery. It can even run automatically if you desire.
- There is additional functionality available for authorized users. The optional “Email Themes” tab allows you to create a template with the firm’s logo that can be shared across the firm. The optional “Email Manager” tab allows you to access all alerts and newsletters across the organization, and the optional “User Manager” tab allows you to subscribe multiple users at one time, assign users to groups and then subscribe those groups to specific alerts or newsletters. If you don’t have those tabs and you think you should, please contact your LexisNexis Newsdesk Account Manager. If you’d like more information about accessing these tabs, click on the “Help” link under your name in the upper right-hand corner and scroll down to #10, The Email Tab.

**3. Export:** You can easily export a Newsfeed to a SharePoint™ or portal.

- To export, simply click on the dropdown arrow to the right of the Newsfeed name
- This will open a pop-up window under the Export subtab under “Share”
- Simply choose the format in which you would like to export, and click on the export button.
- Once the feed appears, copy and paste the feed URL in the appropriate venue (portal, SharePoint™, webpart, etc.
- See Help (under the dropdown next to your name in the upper right-hand corner) and refer to section #12: The Export Tab.



Have any Questions?

Contact LexisNexis Newsdesk™ Customer Support  
 by phone at [866.897.8129](tel:866.897.8129)  
 or by email at [clientservices@moreover.com](mailto:clientservices@moreover.com)

