Lexis® *for* Microsoft® Office

User Guide

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Often, the bulk of your workday may be spent drafting documents and email messages using Microsoft® Word and Microsoft® Outlook®. As you complete these tasks, you may need to perform research, either using Lexis Advance®, the Internet, or on your own computer. Using Lexis® *for* Microsoft Office®, you can complete these research tasks without ever leaving the Microsoft program you are working in.

Lexis for Microsoft Office adds a tab to the Microsoft Word and Outlook ribbons. This tab includes several options that allow you to perform different types of research. For example:

- While composing an email to a colleague or drafting a document, you can use the **Find** button to scan and highlight legal terms of art in your text. You can then click on these terms and use them in a Lexis Advance search query.
- When you are drafting a document in Word, you can identify all of the cases you've cited in your document and then link to Lexis Advance to review the case itself. Lexis for Microsoft Office adds the *Shepard's* Signal™ indicators to help you determine whether the case is still "good law".
- You can also use Lexis for Microsoft Office to validate that your citations and quotations are formatted correctly, as well as automatically insert a Table of Authorities based on the citations you've used in the document.
- As you perform your research, your results are displayed in the right-hand pane of the Word or Outlook window you are viewing. You can explore these results as you would if you were viewing them at Lexis Advance or other search site (like Google™).
- If you need to perform your search directly in Lexis Advance, you can launch it directly from the Lexis for Microsoft Office ribbon.
- You can also save your document to your Lexis Advance work folders.
- Using the tools of Microsystems EagleEye, you can proofread your document, checking for things like properly defined terms, inconsistent numbering, or items or tasks that are incomplete.
- The integration between Lexis for Microsoft Office and Lexis Practice Advisor® allows you access to various practical guidance tools from directly within the legal document you are drafting. For example, you can search for and use forms, practice notes, cases, and secondary materials.
- Finally, using the PDF conversion utilities available in Lexis for Microsoft Office, you can convert your PDF documents to Word format. This lets you use the tools available in Lexis for Microsoft Office to closely examine PDF-based documents you receive from opposing counsel and identify research inconsistencies.

Note:
For a list of features introduced in each version of this product, see What's New in Lexis® *for* Microsoft Office®?.

What's New in Lexis® *for* Microsoft Office® ?

The features listed below were made available in the following releases of Lexis® *for* Microsoft Office® :

Note:
To check which version of Lexis for Microsoft Office you are using, click the **Help** button on the LexisNexis® ribbon. The version number is listed at the top of the dialog box that appears.

Lexis® *for* Microsoft Office® , Release 5.3

- **Lexis Practice Advisor® integration:** Lexis Practice Advisor® is a practical guidance tool that provides transactional attorneys with relevant, practical forms and other content, including practice notes, sample forms, cases, secondary materials, and emerging issues. The integration between Lexis® *for* Microsoft Office® and Lexis Practice Advisor allows you access to these various guidance tools from directly within the legal document you are drafting.
- **Save documents you've drafted to Lexis Advance® work folders:** You can save documents you are drafting to your Lexis Advance folders. (This is in addition to the research you can save to your work folders.)
- Minor enhancements and fixes to existing features.

Lexis® *for* Microsoft Office® , Release 5.2

- **Proofreading tools available from Microsystems EagleEye:** Using these tools, you can proofread your documents and correct terms that have been improperly used or defined, phrases that might be inconsistent, items that are incomplete, and references and numbering that are inconsistent.
- **Save research to folders:** You can now save your research to your Lexis Advance work folders.
- **Updated user interface:** The Lexis for Microsoft Office ribbon buttons have been updated with new designs and colors.
- **Updates to The Bluebook® :** The Bluebook® has been updated from the 19th Edition to the 20th Edition.
- Minor enhancements and fixes to existing features.

Lexis® *for* Microsoft Office® , Release 4.9

- Minor enhancements and fixes to existing features.
- **Search firm documents:** If your firm has a license for Lexis® Search Advantage, your search can include results from your firm's document management system (or DMS). These are the results available when clicking **My Firm**. If you are interested in more information about Lexis Search Advantage, contact your firm representative.
- **Save to LexisNexis® CaseMap:** When you select to download a document in Lexis® *for* Microsoft Office® , you can save the document to LexisNexis® CaseMap. This option is available on the Download Delivery dialog box.

Lexis® *for* Microsoft Office® , Release 4.4

- Minor enhancements and fixes to existing features.
- **Printing and emailing various reports:** You can now print your Check Cite Format, Check Quotes, and Table of Authorities reports.
- **Permanently link citations to documents on Lexis Advance® :** You can link citations in the document you are drafting to their associated documents on Lexis Advance® . Readers of the electronic document can click the link to view the associated case.

Lexis® *for* Microsoft Office®, Release 4.2

- Minor enhancements and fixes to existing features.
- **Overall improvements to Citation Tools:** The Check Cite Format, Check Quotes, and Table of Authorities reports all appear in the right-hand pane now (rather than as dialog boxes). This lets you more easily view the report side by side with the document, and it lets you review items in the report in the order you choose. Items in either the document or pane will stay in sync as you work in both. Additionally, when you make changes to the document text, all three tools let you easily refresh the report so it will be updated with your changes.
- **The following new features are available in the Check Cite Format tool:**
    - You can now save time by correcting all citations in the document at once, rather than individually. (This applies to all citations that have only one suggestion for correction.)
    - All changes you make to citations are automatically updated in the document.
    - When viewing citations, you can view what the tool recognizes as the parent citation and easily change the parent of the short or id. citation, if needed.
- **The Table of Authorities feature has been improved to include the following:**
    - You are no longer required to run **Check Cite Format** before you generate and insert your Table of Authorities. (It is still recommended, however.)
    - You can now add and edit your own custom headings, as well as move citations to different sections of the Table of Authorities.
    - You can remove citations from the Table of Authorities without deleting them from the document.
    - You can also set formatting preferences that will be available for all documents you draft.
- **The Check Quotes feature has been improved to include the following:**
    - New status icons have been added to help you better understand the status of each of the quotes in the document.

Lexis® *for* Microsoft Office®, Release 3.5

- **Integration with Microsoft® Office, including Microsoft® Word and Microsoft® Outlook®:** A LexisNexis® ribbon was added to the Outlook® and Word toolbars, which contains tools for conducting research directly in your Microsoft application. Research appears in the right-hand pane of the Microsoft window so you never have to change windows or tools.
- **Highlighting legal terms of art, company names, individuals' names, and citations:** You can scan your document or email message and highlight the terms that might be important to your research. You can then click these highlighted terms in the document and submit them as search terms. Results may be found in any number of sources, including Lexis® Web, Lexis Advance®, Lexis® Firstlook (which includes cases, statutes, and analytical materials), Martindale-Hubbell®, and so forth.
- **Validating legal authorities in your document:** You can highlight all legal citations in the document and then view the case and/or *Shepard's*® report associated with the citation. *Shepard's* Signal™ indicators also help you identify whether the case is still "good law".
- **Finding and viewing legal precedent:** You can select text in your document and use it to perform a search for cases, briefs, pleadings, and motions, which you can then use as precedent in the document you are drafting. Precedent text can either be copied and pasted or highlighted and dragged to your document.
- **Selecting your own search terms:** Using either the Search feature or the Suggest feature on the LexisNexis ribbon, you can search your personal computer or server, Lexis Advance, and the Web for documents that contain the specific concept or text that you are looking for.
- **Finding and viewing model clauses, contracts, samples, and forms:** You can search for clauses, contracts, forms, and samples. Doing this, you can find model or alternative language for documents you are drafting.

- **Converting PDF documents to Microsoft Word format:** Using the PDF conversion utilities available in Lexis for Microsoft Office, you can convert your PDF documents to Word format. This lets you use the other tools available in Lexis for Microsoft Office to closely examine PDF-based documents you receive from opposing counsel and identify research inconsistencies.
- **View your research path:** Using the History Map, you can save your research history path so you have a record of what was done. You can then share this information with colleagues or clients so you can identify which research tasks were performed and where you left off in your research. Additionally, *Shepard's* Signal™ indicators are updated in the History Map, which lets you view whether a case you are relying on has changed.
- **Perform research in a dedicated Web browser:** While using Lexis for Microsoft Office, your research results appear in the Research Pane. At times, you may want to view these results in a larger window. You can do this by launching the Research Browser. This dedicated research window includes the four search services you are accustomed to using: Lexis Advance, Lexis® Web, Google™, and Bing® . You can use these or any other services while working in the Research Browser.
- **Setting the formatting style for citations:** You can choose which style guide you want your cited references to follow. Your options include The Bluebook® , California style, and New York style.
- **Checking citations for validity and formatting:** You can search through the document and identify all potential citations. If Lexis for Microsoft Office detects problems with the citation, it will offer suggestions for correcting it. Once Lexis for Microsoft Office identifies a citation, it becomes an active field in the document. This means that changes you make to the citation may be reflected in other instances where you cite the same source. You can check citations on a cite-by-cite basis, or you can check all citations in the document at once.
- **Copying quotations from source documents:** You can copy and paste text you are reviewing in the Research Pane or Research Browser into the document you are drafting. When you do this, you can choose to automatically insert a citation for the source.
- **Checking the validity of quotations in a document:** You can use Lexis for Microsoft Office to validate that quoted text in your document is accurate and matches the original source. Additionally, as Lexis for Microsoft Office is checking your quotations, it is also validating whether the citations associated with each quotation are correct. For example, the citation may list an incorrect page number for the source. Where Lexis for Microsoft Office finds inconsistencies, suggestions for correcting the citation are provided.
- **Inserting Tables of Authorities:** You can use Lexis for Microsoft Office to automatically insert a Table of Authorities in your document. If your jurisdiction requires these be formatted a specific way, you can let Lexis for Microsoft Office automatically format the table so it is in compliance with the jurisdiction's rules. Otherwise, you can specify the formatting yourself.
- **Moving cited text within the document:** While drafting a document, you frequently want to move sections of text around. However, typically when you do this, you have to manually update references that are cited multiple times. When you've used Lexis for Microsoft Office to add and manage your citations, Lexis for Microsoft Office can automatically update the long and short form of any references that require it.

How do I set or change the client ID?

As you use Lexis® *for* Microsoft Office® , you can change the client associated with the research you perform while drafting your documents or email messages. If you have a mandatory client ID, you will be prompted to enter an ID when you first click the LexisNexis tab, per session. (A session lasts either 5 hours or until you close all copies of Outlook® and Word.)

To do this:

1. While viewing either a Microsoft Word document or an Outlook® email message, click the **Client** button (). The Set Client ID dialog box appears.
2. Provide the required information on the form.
3. Click **OK** to save your changes and return to your document or email message.

Contacting LexisNexis®

As you use Lexis® *for* Microsoft Office® , you may have questions or comments. If you can't find the answer in the help system, if you would like to view product demonstrations, or if you have other comments you would like to make about the product, please contact us using one of the following options:

LexisNexis® Customer Support

Law firm, corporate, and government users	1-888-539-4770
Law school students and faculty	1-800-455-3947
Additional Customer Support options	http://support.lexisnexis.com/lmo/

Microsoft® Product Help

Telephone	1-800-936-4900
Web site	http://support.microsoft.com

Getting Help While Using Lexis® *for* Microsoft Office®

Note:
The information in this help topic applies to searching the help system, not Lexis® *for* Microsoft Office®.

You can access the Lexis for Microsoft Office help file at any time while you use the product by clicking the **Help** button on the LexisNexis® ribbon. Then, click the **Help** link.

The help file includes several options for accessing information in it:

- Click the **Home** link in the Help window navigation bar to view the main "table of contents" for the help file. This displays a page that describes sections of the help file. You can click a folder and navigate to the specific help topic that most interests you.
- Enter a search term or phrase in the **Search** box and click **Search** to view topics that contain your search phrase. If the search phrase is found, a Search Results page is displayed, showing the different topics, grouped by category, that meet your criteria.

  Note:
  See Form a Help Search Query for detailed instructions on creating a help search query.

Viewing Individual Help Pages

To print the help page you are viewing, click the **Print** icon ( ) near the top-right corner of the page.

To view the help page as a PDF document or as an RTF document, click the **PDF** icon ( ) or the **RTF** icon ( ) near the top-right corner of the page.

Resizing Text

To make the help text size larger, click the **Increase font size** icon ( ). To make the help text size smaller, click the **Decrease font size** icon ( ).

Form a Help Search Query

Note:
The information in this help topic applies to searching the help system, not Lexis® *for* Microsoft Office® .

The search feature available in the help file provides a powerful mechanism for retrieving information from the online help system. You can use the search field at the top of the Help page to submit words and phrases. In addition, you can use connectors, wildcards, and "fuzzy" searches.

Note:
When you submit a search query, some characters require special treatment. The following characters need to be escaped before they can be submitted as part of a search query:

```
+ - & | ! ( ) { } [ ] ^ " ~ * ? : \
```

To escape these characters, use the \ before the character. You do not need to escape characters when you are using them as part of the search query syntax.

Searching the Help Using Phrases and Connectors

To find documents containing ...	Enter...
The phrase "table of contents"	`"table of contents"`
The word "research" or the phrase "table of contents" or both	`research OR "table of contents"`
The word "research" and the phrase "table of contents"	`research AND "table of contents"`
The word "research" but not the word "lexisnexis"	`research NOT lexisnexis`

Searching the Help Using Wildcards and Fuzzy Searches

Example Query	Description
`research`	Keyword search for documents containing the word `research`. **Note:** The search feature does not support *stemming*. A search for the word `alert` will only return the whole word and not partial matches such as `alerts` or `alerting`. To obtain results such as these you must use a wildcard, as shown below.
`research*`	Wildcard search for documents containing words that begin with the letters `research`. For example: ■ research*ed* ■ research*er* ■ research*es*

	■ research*ing*
`smartlinks~`	Fuzzy search for documents that contain words similar to `smartlinks` (e.g., `SmartLinx`).

Searching Using Lexis® *for* Microsoft Office®

How do I identify legal entities in my document?

As you are drafting your document or email message, you can have Lexis® *for* Microsoft Office® search for and highlight the names of people (such as attorneys or judges) or companies, as well as identify terms of art and citations. When these items are highlighted, they become interactive, meaning you can click the item and view related research or case information in the Research Pane.

To highlight names, terms, and citations in your document:

1. While in either a Microsoft Word document or an Outlook® email message, and in the **Analysis** section of the ribbon, click the **Find All** button ( ). Names, possible legal terms, and citations are marked in the document.

   Note:
   You can choose specific types of terms you want highlighted by selecting your option from the **Find** button drop-down list.

2. Click highlighted text to view information about that text. Categorized research results appear in the Research Pane.
3. While viewing the Research Pane, complete any of the following optional steps:

Option	Description
To view additional information about a particular result	Click the link for that result. The research pane is opened and the results for the term are displayed.
To view results in specific sources (such as **Lexis Advance** or **Lexis Web**) and then in specific categories for those sources	Click the **Source** tab, followed by the category tab, below it.
To close the tab once you are done reviewing your search results	Click in the upper-right corner of the tab.

How do I perform research from within my document?

One of the greatest tools available from within Lexis® *for* Microsoft Office® is the ability to perform searches in the different sources you use the most: Lexis Advance, your computer, the Web, and your work folders. Using Lexis for Microsoft Office, you can search each of these sources individually or cumulatively.

To do this:

1. While viewing your document, click the **Search** button ( ). A search box appears at the top of the Research Pane.
2. Choose the source you want to search from the drop-down list. Your options include: **Lexis Advance**, **Lexis Practice Advisor**, **My Computer**, **Web**, and **Work Folders**. Or, to search all of the sources at once, choose **Search All**.
3. Enter your search terms in the search box.
4. Click the **Search** button ( ) to submit the search and review your search results.

How do I launch and search Lexis Advance® from my Microsoft® Word document?

When you perform research using Lexis® *for* Microsoft Office® , the results of your research appear, by default, in the Research Pane. At times, however, you may want to view your results directly in Lexis Advance® . Or, sometimes you want to move directly to Lexis Advance to perform your research. To do these things, you can open Lexis Advance in a separate window.

To open a Lexis Advance window from the ribbon:

1. Click the **Lexis Advance** button ( ) on the LexisNexis ribbon. A window with Lexis Advance appears.
2. Complete your research.

To open a Lexis Advance® window from the Research Pane:

1. While viewing your search results in the Research Pane, click the **View in Browser** button. A window showing Lexis Advance appears, showing the contents of the tab you are viewing in the Research Pane.
2. Complete your research in the browser window.

Work with Citations in Your Documents

How do I identify and view a report of citations in my document?

While drafting a document, you can generate a list of citations used in your document. When you do this, citations will be changed to hyperlinks so you can click them and view the related cases in the Research Pane. Additionally, *Shepard's* Signal™ indicators will be added to the citations to help you know the citation's status.

Note:
If a citation is recognized, but there is no exact match on *Shepard's* at Lexis Advance® (for example, because of formatting or a misspelling), this icon will appear next to the citation. This is because the system is not able to determine exactly which *Shepard's* report to return. Clicking this button lets you look at *Shepard's* results at Lexis Advance so you can identify the correct *Shepard's* report for your citation.

To mark citations in your document:

1. While viewing the document, in the **Shepard's® Tools** section of the ribbon, click the **Get Cited Docs** button ( ). The text is scanned and any citations you have included in the text are changed to hyperlinks. Where possible, *Shepard's* Signal™ indicators are displayed. Additionally, the Research Pane is opened on the right side of the document, and the case list is displayed in the Validation tab.

   Note:
   Any citations listed in comment fields will be ignored.

2. Complete any of the following optional steps:

Option	Description
To view a case you are citing	Click the hyperlink. The case is opened in the Research Pane.
To view the *Shepard's* Summary for a citation	Click the indicator next to the hyperlink. The following indicators can help you determine the current standing of a case: Warning: Negative treatment indicated Q Question: Validity questioned by citing references Caution: Possible negative treatment Positive treatment is indicated A Citing references with analysis are available I Citation information is available
To change citations back to standard (non-hyperlinked) text	Click the **Get Cited Docs** button ( ) again.

Note:

- Citations do not always have *Shepard's* Signal™ indicators, which show how subsequent courts have discussed and impacted an earlier case. It is possible that a case has never been treated critically or positively by another court. Also, a case could be new and not yet cited by another court. In these instances, the case exists but no subsequent *Shepard's* treatment exists to be displayed.

- If you retrieve a *Shepard's* report, normal usage charges apply.
- To validate whether your citations are in valid format, click **Check Cite Format**.

How do I verify that citations in my document are formatted correctly?

While drafting your document, you can check your citations to make sure they are formatted correctly. Lexis® *for* Microsoft Office® can identify all potential citations and detect problems with them. When problematic citations are found, Lexis for Microsoft Office can offer suggestions for correcting them.

Lexis for Microsoft Office also tracks each citation in the document for you. If the citation is valid and formatted properly, its long and short form will be updated as you make changes to the document. Additionally, any text you indicate is a citation (whether it's valid or not) will be included in the document's Table of Authorities; however, which section of the Table of Authorities it is inserted in depends on how you resolve the citation format.

To check the format of citations in your document:

1. While viewing the LexisNexis ribbon, click the **Check Cite Format** button (). The document is analyzed and if any citations are identified, a list of them appears in the Check Cite Format report, located in the right-hand pane.
2. Review each of the citations listed and make any necessary corrections, based on the following:

Icon	What It Means
	The citation is recognized by Lexis for Microsoft Office and does not require any further action.
	The associated text is recognized as a citation, but it does not conform to the selected style guide. To correct the issue: a. Click the citation. The area around the citation expands to show options for resolving the citation format. b. Review the suggestions listed in the **Suggestions** box. c. Select the suggestion in the **Suggestions** box that best represents your citation and click **Use Suggestion**. The citation in the document is replaced with your correction. d. If no suggestions are listed, either edit the current citation to bring it into compliance (you can click **Check Current** to check it after you've made your changes), or accept the current citation as it is by clicking **Use Current**. The text as it appears in the Current Citation box is used in the document.
	The selected text is not a valid citation, and Lexis for Microsoft Office cannot provide any suggestions. To correct the issue: a. Click the text. The area around the citation expands to show options for resolving the citation format. b. Either select **Let me edit text of current citation** and then make whatever changes are necessary to create a valid citation (click **Check Current** to check its validity), or click **Not a Citation**.

3. Once you have reviewed a citation, its icon changes to one of the following:

Icon	What It Means
	This citation is valid, and its long and short form will be updated automatically as you work in the document. The citation reference will be included in its proper place in the Table of Authorities.
	You have reviewed the associated citation and confirmed that it is acceptable. However, it does not conform to the selected style guide, so its long and short forms will not be automatically updated. The citation will be included in its proper place in the Table of Authorities.

Icon	What It Means
	You have reviewed the text and confirmed that it is acceptable; however, Lexis for Microsoft Office does not recognize it as a citation. Still, it will be included in the Other section of the Table of Authorities. Any long and short forms will not be updated automatically.
	You have reviewed the text and indicated that it is not a citation. The text will not be tracked by Lexis for Microsoft Office (i.e., long and short forms will not be managed, nor will it be included in the Table of Authorities).

Note:
See Other Options Available in the Check Cite Format Pane for information about other options available in this report.

Other Options Available in the Check Cite Format Pane

The topic How do I verify that citations in my document are formatted correctly? contains instructions for reviewing and resolving citation formats within a document and covers the basic functionality available when reviewing each citation. Other options exist in the Check Cite Format pane, however. Following is a table that discusses what these features are and how they can be used:

Feature	Description
Citation scorecard	The citation scorecard, located at the top of the Check Cite Format pane, shows a high-level view of citations in the document and their status as far as they are formatted. The scorecard uses icons to help you determine how many citations have had their format reviewed and accepted or changed. **Tip:** You can rest your mouse pointer over an icon in the scorecard and view a description of what that particular icon means.
Correct All	When you click this button, Lexis for Microsoft Office will review all citations in the document and automatically correct those citations that have a single suggestion. If the citation is already validated by Lexis for Microsoft Office, or if two or more format suggestions are available for the citation, it will not be changed. Additionally, if you've already marked a possible citation as "not a citation," it will be skipped. **Caution:** Once you click **Correct All**, these changes cannot be undone. If you want to correct these citations individually, close the Correct All Citations dialog box, and then click on each individual citation within the report.
Not a Cite	When you select some document text and click this button, Lexis for Microsoft Office will review the text and mark any possible citations in the text as "not a cite." **Caution:** Once you click **Not a Cite**, these changes cannot be undone. If you want to review these citations individually, close the Not a Cite dialog box, and then click on each individual citation within the report.
Add Citation	To use this option, select (highlight) a single citation in your document and then click this button. Lexis for Microsoft Office then analyzes the text and makes suggestions for valid formatting, if needed.
Refresh Report	Use this option to update the Check Cite Format pane with changes you've made to your document text. For example, if you have added citations to the document text, or if you've moved your existing long and short-form citations around, you can click this button and the document will be analyzed and the report will be updated with your changes.
Change cite boundaries	Click this link to more clearly define the beginning and end of the actual citation. This option is useful if Lexis for Microsoft Office has incorrectly identified non-citation text as part of your citation and you want to remove it. To define the citation boundaries, click **Change cite boundaries** and highlight just the text you consider part of the citation. Then click **Submit**. (Click **Expand Text** to view more of the text surrounding the citation.)
Let me edit text of current citation	Select this option to edit the text in the **Current Citation** box. When you are finished making your changes, you can click **Check Current** to validate the format of the citation. If Lexis for Microsoft Office has a suggestion for further correcting the citation, it will be listed in the **Suggestions** box.
Get suggested document	Click this link to view the document you are citing. This can help you review the context in which you've used the citation.

Search Lexis Advance®	Click this link to search directly on Lexis Advance for whatever information you need to understand or resolve this citation.
Change parent	Click this link to reassign the citation to a different parent document. When you click the link, the Change Parent dialog box appears, where you can choose the new document from the **New Parent** drop-down list. Once reassigned, click the **Check Parent** button to verify the citation format and click **Submit**.

How do I verify quotes I've used from cases I've cited are accurate?

When drafting legal documents, you often quote other sources to substantiate your arguments. You can use Lexis® *for* Microsoft Office® to validate that your quoted text is accurate and matches the original source.

Additionally, as Lexis for Microsoft Office is checking your quotations, it is also validating whether the citations associated with each quotation are correct. For example, the citation may list an incorrect page number for the source. Where Lexis for Microsoft Office finds inconsistencies, you may see a warning that the pinpoint page is incorrect. (You can then run Check Cite Format to make the correction.)

To do this:

> **Note:**
> While it is not required, it is recommended that you first verify the format of your citations in your document before you check your quotations.

1. While viewing your document, click the **Check Quotes** button ( ) in the *Shepard's*® Tools section of the ribbon. The document is scanned for quotations and the Check Quotes pane appears to the right of the document.
2. Review each of the quotations listed and make any necessary corrections, based on the following icons:

Icon	What It Does
	The associated quotation is correct and pinpoints the correct citation pages. You do not need to do anything to modify the quotation.
	The associated quotation has been located in the correct document, but the quotation may have incorrect text or the pinpoint cite may be inaccurate. To correct the problem: a. Click the quotation. The pane expands to show options for working with the quote. b. If the quotation is incorrect: i. Review the suggestions listed in the **Source Text** box. Differences between source text and your text are marked using red and green. ii. Decide whether to use the suggested quotation (click **Use Source Text**) or the current quotation (click **Use Current**). **Note:** You can mark the changes you've made to the current quotation (using brackets and/or ellipses) by selecting **Mark my changes to the source text**. You can also make further changes to the current quotation by selecting **Let me edit my text** and then making those changes to the text in the box. c. If the pinpoint page associated with the quotation is incorrect (a note with a caution icon will appear at the top of the review box), click one of the following links, based on whether you've reviewed the format of the citation associated with the quotation: i. Click **Reassign pinpoint page** to view and select the correct citation for the quote. At the Reassign Pinpoint Page dialog box, select the suggested citation you want to use and click **Submit**. ii. Click **View suggested pinpoint page** to view the possible citations. (To actually reassign the citation, you must first review all citations in the document using How do I verify that citations in my document are formatted correctly?.)

Icon	What It Does
	The associated quotation cannot be found in any document. To correct the problem: a. Click the quotation. The pane expands to show options for working with the quote. b. Review the text in the **Current Quotation** box and either accept the text as it's currently shown by selecting **Use my text** and clicking **Use Current**, or select **Let me edit my text** and make whatever changes you need to the quote. Then click **Use Current**.

3. Once you have reviewed a quotation, its icon changes to one of the following:

Icon	What It Means
	The quotation is correct. No further changes need to be made to it.
	You have reviewed the quotation and, despite having inaccuracies, you have confirmed that the current version is acceptable.
	You have reviewed the quotation and, despite it not matching any document, you have confirmed that the current version is acceptable.

How do I copy text from a case I'm viewing and paste it, with its citation, into my document?

At times, you may want to use some of the text you are reviewing in the Research Pane or Lexis Advance in the document you are drafting. You can copy this text and paste it in your document. When you do this, a citation listing the source will be included.

There are three ways you can copy text to your document and include a citation for it:

- Using shortcut menu commands
- Using keyboard shortcut commands
- Using a drag-and-drop command

To use shortcut menu commands:

1. Perform your research.
2. While viewing your research in the Research Pane, highlight the text you want to include in your document.
3. Right-click on the text and choose **Copy with Cite** from the shortcut menu. A list of options appears.
4. Select an option, based on the following:
   - Choose **Text plus citation** to add the text exactly as you copied it, without enclosing it in quotations, etc. The text will appear inline with the text into which you are pasting it.
   - Choose **Text formatted as a quotation plus citation** to paste the text as a quotation. This means that if the text exceeds a certain length (about 50 words), it will appear in its own text block. Otherwise, it will appear inside quotation marks. The citation will be included.
   - Choose **Citation only** to copy just the citation for the associated text.
5. Place your cursor in the document where you want to paste the text you copied.
6. Right-click and choose **Paste with Citation** from the shortcut menu. The text is pasted, according to the option you selected in Step 4.

To use keyboard shortcut commands:

1. Perform your research.
2. While viewing your research in the Research Pane, highlight the text you want to include in your document.
3. Press **CTRL+C** to copy the text.
4. Place your cursor in the document where you want to paste the text you copied.
5. Press **CTRL+V**. By default, the text is pasted just as you copied it, not as a quotation. The text does include the citation, however.

To use a drag-and-drop command:

1. Perform your research.
2. While viewing your research in the Research Pane, highlight the text you want to include in your document.
3. Using your mouse, drag the highlighted text to the place in the document where you want the text inserted. By default, the text is pasted just as you copied it, not as a quotation. The text does include the citation, however.

How do I link citations in my document to their cases on Lexis Advance®?

You can permanently link citations in the document you are drafting to their associated documents on Lexis Advance®. Readers of the document (in electronic format) can click the link to view the associated case. (Standard subscription rules and rates apply.)

To do this:

- While viewing your document, click the **Link to Cites** button ( ). The document is analyzed and citations that can be linked to content on Lexis Advance are converted to hyperlinks.

Note:
To remove the hyperlinks, click the **Link to Cites** button again.

How do I insert a Table of Authorities in my document?

When drafting your legal document, you may need to include a Table of Authorities, which lists the cases and other legal sources you include in the document. The Table of Authorities includes the page numbers in the document on which the cited reference appears.

If your jurisdiction requires Tables of Authorities be formatted a specific way, you can let Lexis® *for* Microsoft Office® automatically format the table so it is in compliance with the jurisdiction's rules. Otherwise, you can specify the formatting yourself, which can include adding your own headings or rearranging entries within the Table of Authorities.

To do this:

> **Note:**
> For best results, you should first verify the format of all citations in your document before you generate a Table of Authorities.

1. While viewing your document, click the **Prepare TOA** button ( ) in the **Shepard's® Tools** section of the ribbon. (When prompted, confirm that you want to open the Table of Authorities pane.)
2. While viewing the Table of Authorities pane, use any of the following options to work with the table:

Option	Description
Add Citation	To add a single citation from the document that isn't already listed in your Table of Authorities, select (highlight) the citation in your document and then click **Add Citation**. Lexis for Microsoft Office then analyzes the text and adds the citation to the Table of Authorities.
Refresh Report	Use this option to update the Table of Authorities pane with changes you've made to your document text. For example, if you have added citations to the document text, or if you've moved your existing long and short-form citations around, you can click this button and the document will be analyzed and the Table of Authorities report will be updated with your changes. (To update the table within the document, click **Update TOA**.)
Customize format	Click this link to specify the settings you want to use for inserting this Table of Authorities. The options you select here will only be used for this document. To set the default preferences for all documents, see How do I set my preferences for inserting a Table of Authorities? for details.
Advanced Functions	Click the **Expand** icon ( ) to view options for adding your own custom headings to the Table of Authorities, and then complete the following steps: a. Enter your heading in the **Add new heading to Table of Authorities** box. **Note:** As you type, potential headings are suggested, based on the characters you type. To select one of these suggestions, select it from the list. b. Click **Add** to add the heading to the table. c. To arrange the order of headings and citations within the table, click the **Up** and **Down** arrows (and) to the right of the entry (in the table) to move the entry up or down in the category it currently resides. To move the entry to a new category, click the **Move to New Category** button .

3. When you're ready to insert the Table of Authorities in the document, click in the document where you want the table to appear and then click **Insert TOA**. The table is inserted.

Note:

To update your Table of Authorities, perhaps because you edited the document further, click the **Prepare TOA** button ( ). Make whatever changes you need to the structure of the table (using the instructions above), and then click **Update TOA**.

How do I remove citation metadata from the document?

When you use Lexis® *for* Microsoft Office® to manage citations within your document, certain metadata is stored about each citation. This metadata helps information in your document stay in sync. Specifically, it's this metadata that makes it possible for you to move quoted text from one location in the document to another and have the citation reference be updated as necessary.

At times, however, you may want to remove this metadata. Reasons may include improving the confidentiality of the document or making it ready for review by your peers. Once you remove the metadata, citations will no longer be managed by Lexis for Microsoft Office.

To remove citation metadata:

1. In the **Shepard's® Tools** section of the ribbon, choose **Remove Citation Metadata** from the **Set Cite Format** drop-down list. A message appears, confirming you want to do this.
2. When asked to confirm, click **Yes** to continue. The metadata is removed.

Tip:
If you want Lexis for Microsoft Office to manage your citations again, check citation formats again.

How do I remove hyperlinks from the document?

You can remove all hyperlinks from the document. This includes hyperlinks you've added as well as those added by Lexis® *for* Microsoft Office® .

To do this:

1. In the **Shepard's® Tools** section of the ribbon, choose **Remove Hyperlinks** from the **Set Cite Format** drop-down list. A message appears, confirming you want to do this.
2. When asked to confirm, click **Yes** to continue. All hyperlinks (except those used in a Table of Authorities) are removed.

How do I print or email my citation format, quotation, or Table of Authorities reports?

Once you are viewing either your citation format report, your check quotes report, or a Table of Authorities report for your document, you can print or email the list to share it with others or keep a separate record for yourself.

To do this:

- At any point during the Check Cite Format, Check Quotes, or Insert Table of Authorities process, complete the following:
  - Click the **Email** icon ( ) to copy the report into an email and send it to someone else.
  - Click the **Print** icon ( ) to print the report.

Search for Precedent

How do I view cases related to the document I'm drafting?

While drafting a document, you may wish to view cases that are related to the contents of your document. You can use Lexis® *for* Microsoft Office® to locate these cases. Results are displayed in the Research Pane. For the most part, you can work with these results as you would if you were viewing them at Lexis Advance®.

To view related case law:

1. While viewing a document, highlight the text on which you want to search.
2. In the **Precedents & Guidance** section of the ribbon, click the **Cases** button ( ). Cases related to your search phrase appear in the Research Pane.

   Note:
   Lexis® *for* Microsoft Office® 5.2 and earlier users: In the **Precedents** section of the ribbon, click the **Precedent Types** button ( ) and choose **Cases** from the list of options. Cases related to your search phrase appear in the Research Pane.

3. Click one of the following tabs to show only documents found using that search tool: **Lexis Advance®**, **Lexis® Web**, **Bing®**, or **Google™**.
4. Review the list of cases, and complete any of the following optional steps:

Option	Description
To view a specific case	Click the hyperlink associated with the case name.
To view your search results in a separate browser window	Click the **View in Browser** button.
To filter your search results (Lexis Advance and Lexis Web searches only)	Click the **Narrow by** drop-down list, locate the area on which you want to filter, and choose the specific filter. For example, to filter based on court, choose the specific court from the list under the **Court** heading.
To sort your results in a different order	Choose your sorting option from the **Sort by** drop-down list.
To rerun your search using different options, or to expand your search to include synonyms or other text equivalents	Choose the option you want from the **Actions** drop-down list.

How do I view briefs, motions, or pleadings related to my document?

While drafting a document or email message, you may wish to view briefs, motions, or pleadings that are related to the contents of your document. You can use Lexis® *for* Microsoft Office® to locate these types of documents. Results are displayed in the Research Pane. You can work with these results as you would if you were viewing them at Lexis Advance® .

To view related briefs, pleadings, and motions:

1. While viewing your document, highlight the text on which you want to search.

   Note:
   Lexis® *for* Microsoft Office® 5.2 and earlier users: In the **Precedents** section of the ribbon, click the **Precedent Types** button ( ) and choose **Briefs, Pleadings, and Motions** from the list of options. Documents related to your search phrase appear in the Research Pane.

2. In the **Precedents** section of the ribbon, click the **Precedent Types** button ( ) and choose **Briefs, Pleadings and Motions** from the list of options. Documents related to your search phrase appear in the Research Pane.
3. Click one of the following tabs to show only documents found using that search tool: **Lexis®** , **Lexis® Web**, **Bing®** , or **Google™**.
4. Review the list of documents, and complete any of the following optional steps:

Option	Description
To view a specific document	Click the hyperlink associated with the document name.
To filter your search results (Lexis and Lexis Web searches only)	Click the **Narrow By** drop-down list, locate the area on which you want to filter, and choose the specific filter. For example, to filter based on court, choose the specific court from the list under the **Court** heading.
To view your search results in a new browser window	Click the **View in Browser** button.
To sort your results in a different order	Choose your sorting option from the **Sort by** drop-down list.
To rerun your search using different options, or to expand your search to include synonyms or other text equivalents	Choose the option you want from the **Actions** drop-down list.

How do I search for and use clauses and contracts?

Before You Begin:

This feature *is not available* to Lexis® *for* Microsoft Office® 5.3 and later users. Instead, you can use Lexis Practice Advisor® to perform these types of searches. See How do I use Lexis Practice Advisor® to either search for or browse available forms and documents? for details.

You can highlight text in your document and then use it to search for related clauses or contracts. For example, imagine you are creating an employment agreement for a contract employee. You can highlight text like "employment agreement for contract employee" in your document and then search for clauses or contracts that relate to this idea.

To search for clauses and contracts:

1. While viewing a document, highlight the text on which you want to search.
2. In the **Precedents** section of the ribbon, click the **Precedent Types** button ( ) and choose **Clauses & Contracts** from the list of options. Documents related to your search appear in the Research Pane.
3. Click one of the following tabs to show only documents found using that search tool: **Lexis®** , **Lexis® Web**, **Bing®** , or **Google™**.
4. Complete any of the following optional steps:

Option	Description
To view a specific document	Click the hyperlink associated with the document you want to review.
To filter your search results (Lexis and Lexis Web searches only)	Click the **Narrow by** drop-down list, locate the area on which you want to filter, and choose the specific filter. For example, to filter based on court, choose the specific court from the list under the **Court** heading.
To sort your results in a different order	Choose your sorting option from the **Sort by** drop-down list.
To rerun your search using different options, or to expand your search to include synonyms or other text equivalents	Choose the option you want from the **Actions** drop-down list.
To view your search results in a separate browser window	Click the **View in Browser** button.

How do I search for and use samples and forms?

Before You Begin:

This feature *is not available* to Lexis® *for* Microsoft Office® 5.3 and later users. Instead, you can use Lexis Practice Advisor® to perform these types of searches. See How do I use Lexis Practice Advisor® to either search for or browse available forms and documents? for details.

You can highlight text in your document and then use Lexis® *for* Microsoft Office® to search for model forms. For example, imagine you are drafting an employment agreement for a contract employee. You can highlight text like "employment agreement for contract employee" in your document and then search for model documents that can serve as examples or templates for your work. These models may include text or other ideas you may wish to incorporate in your own document.

To search for samples and forms:

1. While in the document, highlight the text on which you want to search.
2. In the **Precedents** section of the ribbon, click the **Precedent Types** button ( ) and choose **Samples & Forms** from the list of options. Documents related to your search appear in the Research Pane.
3. Click one of the following tabs to show only documents found using that search tool: **Lexis®** , **Lexis® Web**, **Bing®** , or **Google™**.
4. Complete any of the following optional steps:

Option	Description
To view a specific document	Click the hyperlink associated with the document you want to review.
To filter your search results (Lexis and Lexis Web searches only)	Click the **Narrow by** drop-down list, locate the area on which you want to filter, and choose the specific filter. For example, to filter based on court, choose the specific court from the list under the **Court** heading.
To sort your results in a different order	Choose your sorting option from the **Sort by** drop-down list.
To rerun your search using different options, or to expand your search to include synonyms or other text equivalents	Choose the option you want from the **Actions** drop-down list.
To view your search results in a separate browser window	Click the **View in Browser** button.

How do I use Lexis Practice Advisor® to either search for or browse available forms and documents?

Before You Begin:
This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

Lexis Practice Advisor® provides you access to transactional forms, practice notes, briefs, pleadings, motions, cases, secondary materials, emerging issues, and so forth. Using Lexis Practice Advisor, you can either search for a specific form, or you can browse through all available forms, based on practice area.

To search Lexis Practice Advisor for a specific document:

1. While viewing the LexisNexis ribbon, click the **Practice Advisor** button drop-down arrow and choose **Search Practice Advisor** from the list of options. the Lexis Practice Advisor® pane appears with the search box at the top of the pane.

   Note:
   If you have a specific term or phrase in your document you want to use as your search term, highlight it before clicking this button.

2. Type your keywords in the search box and click the **Search** button. Your search results appear in the pane.
3. Using the tabs across the top of the results list, select the type of document you want to view. For example, to view pleadings, click the **Briefs, Pleadings and Motions** tab.
4. Once you have located the document you want to view, click its link. The document is opened.

To browse through all available documents:

1. While viewing the LexisNexis ribbon, click the **Practice Advisor** button drop-down arrow and choose **Browse Practice Advisor** from the list of options. the Lexis Practice Advisor® pane appears with a list of topics listed in it.
2. Click the **Practice Area** drop-down list to view forms and documents available for that practice.
3. Using the links under **Topics**, navigate to the document you want to view and click its link. (To view all topics at once, click **Expand All** in the upper-right corner of the pane.)

For information about working with your Lexis Practice Advisor results, see How do I work with my Lexis Practice Advisor® results?.

How do I complete an interactive form using Lexis Practice Advisor® ?

Before You Begin:
This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

When using Lexis Practice Advisor® , you have access to interactive forms that you can customize with data about your clients, such as names, dates, and so forth. Where applicable, Lexis Practice Advisor forms also include links to alternate clauses you can add, and alternative clauses you can use in place of standard text. Once you find one of these editable forms, you can complete it by opening the form in Lexis Advance or by opening it in Microsoft Word.

To complete an interactive form:

1. While reviewing your list of Lexis Practice Advisor results, click the **Forms** tab. The view changes to show all available forms.
2. Click the link for a form you want to view. The form is opened in the research pane.
If the form is editable, you will see fields in the document which instruct you what type of information to enter in them.
3. Click one of the following options to customize the form:
   - Click **Edit in Browser** to open the form directly in Lexis Advance. From there, you can click the icon to enter your answer for the corresponding field, the icon to view the notes associated with the field, and the icon to view alternate clauses you can replace the existing clause with. When you are finished completing the form, click **Draft Now** to save the completed form to your computer.
   - Click **Open as a Word Document** to download the document to your computer. When the document is opened, fields you can edit are marked with brackets. However, alternate clauses and drafting notes aren't included in the saved document.

Working with Lexis Practice Advisor®

About Lexis Practice Advisor®

Note:

Lexis Practice Advisor® is available to Lexis® *for* Microsoft Office® version 5.3 and later users.

Lexis Practice Advisor® is a practical guidance tool that provides transactional attorneys with relevant, practical forms and other content, including practice notes, sample forms, cases, secondary materials and emerging issues. The integration between Lexis for Microsoft Office and Lexis Practice Advisor allows you access to these various guidance tools from directly within the legal document you are drafting.

Using Lexis Practice Advisor, you can either browse through the vast listing of available documents, or you can search for a specific document. If your results include forms or model documents, you can add your own custom data (such as client names, dates, and so forth) to the document.

Additionally, you can launch Lexis ® Market Tracker, which searches all legal documents filed for the purchase of corporations in the United States. This helps you find information about recent developments in a particular industry or about a single sale. You can locate digital copies of the original documents for sales, closing contracts, financing, etc., then search those documents for a specific name or phrase.

How do I use Lexis Practice Advisor® to either search for or browse available forms and documents?

Before You Begin:

This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

Lexis Practice Advisor® provides you access to transactional forms, practice notes, briefs, pleadings, motions, cases, secondary materials, emerging issues, and so forth. Using Lexis Practice Advisor, you can either search for a specific form, or you can browse through all available forms, based on practice area.

To search Lexis Practice Advisor for a specific document:

1. While viewing the LexisNexis ribbon, click the **Practice Advisor** button drop-down arrow and choose **Search Practice Advisor** from the list of options. the Lexis Practice Advisor® pane appears with the search box at the top of the pane.

   Note:

   If you have a specific term or phrase in your document you want to use as your search term, highlight it before clicking this button.

2. Type your keywords in the search box and click the **Search** button. Your search results appear in the pane.
3. Using the tabs across the top of the results list, select the type of document you want to view. For example, to view pleadings, click the **Briefs, Pleadings and Motions** tab.
4. Once you have located the document you want to view, click its link. The document is opened.

To browse through all available documents:

1. While viewing the LexisNexis ribbon, click the **Practice Advisor** button drop-down arrow and choose **Browse Practice Advisor** from the list of options. the Lexis Practice Advisor® pane appears with a list of topics listed in it.
2. Click the **Practice Area** drop-down list to view forms and documents available for that practice.
3. Using the links under **Topics**, navigate to the document you want to view and click its link. (To view all topics at once, click **Expand All** in the upper-right corner of the pane.)

For information about working with your Lexis Practice Advisor results, see How do I work with my Lexis Practice Advisor® results?.

How do I complete an interactive form using Lexis Practice Advisor® ?

Before You Begin:

This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

When using Lexis Practice Advisor® , you have access to interactive forms that you can customize with data about your clients, such as names, dates, and so forth. Where applicable, Lexis Practice Advisor forms also include links to alternate clauses you can add, and alternative clauses you can use in place of standard text. Once you find one of these editable forms, you can complete it by opening the form in Lexis Advance or by opening it in Microsoft Word.

To complete an interactive form:

1. While reviewing your list of Lexis Practice Advisor results, click the **Forms** tab. The view changes to show all available forms.
2. Click the link for a form you want to view. The form is opened in the research pane.
   If the form is editable, you will see fields in the document which instruct you what type of information to enter in them.
3. Click one of the following options to customize the form:
   - Click **Edit in Browser** to open the form directly in Lexis Advance. From there, you can click the icon to enter your answer for the corresponding field, the icon to view the notes associated with the field, and the icon to view alternate clauses you can replace the existing clause with. When you are finished completing the form, click **Draft Now** to save the completed form to your computer.
   - Click **Open as a Word Document** to download the document to your computer. When the document is opened, fields you can edit are marked with brackets. However, alternate clauses and drafting notes aren't included in the saved document.

How do I launch Market Tracker?

Before You Begin:

This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

Lexis® Market Tracker includes information on U.S. acquisitions. It includes the legal documents associated with the purchase and sale of a business in the U.S. so you can find information about recent developments in a particular industry, or about a single acquisition. You can locate facsimiles of the original documents for sales, proxies, 8Ks, contracts, financing, etc. and then search those documents for a specific name or phrase.

To launch Market Tracker from Lexis® *for* Microsoft Office® :

1. While viewing the LexisNexis ribbon, click the **Market Tracker** button on the Precedents & Guidance ribbon. The Market Tracker tool is opened.
2. Complete the form to perform your resesarch.

   Note:
   Click the **More** drop-down list to select and view the help file for more information about using this tool.

How do I work with my Lexis Practice Advisor® results?

Before You Begin:
This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

Once you either complete your search using Lexis Practice Advisor® , or you locate (via browsing) the documents available for a specific practice area, you can work with your results. As you view your results, you can filter based on document type, sort your results, deliver your results, and so forth.

To work with your results:

1. Perform your search by searching on a specific term or by browsing through practice area topics.
2. Using the options available based on your search, complete any of the following steps:

To...	Do This
View your results based on document type	Click the tab for the type of document you want to view. For example, to view available forms, click the **Forms** tab.
Add the results list from the page you are viewing to your work folder	Click the **Add to Folder** drop-down list and either select one of the most recent folders you've used, or select **Choose a folder** to review all available folders or create a new folder. See How do I save my research and Lexis Advance® documents to a work folder? for additional information.
Deliver the results list from the page you are viewing either via printing, downloading, or emailing	Click the icon for the delivery type you want to complete. See How do I deliver my Lexis for Microsoft Office® search results and documents? for additional information.
View the results directly in Lexis Advance	Click **View in Browser**. The results are displayed in Lexis Advance.
Sort the results	Click the **Sort by** drop-down list to choose your sorting option.
Filter your search results	Click the **Narrow By** drop-down list and choose the filter you want to apply.
View a specific document	Click the link for the document.
Complete an interactive form (as indicated by form fields throughout the document)	Click either **Edit in Browser** or **Open as a Word Document**. Then enter the required information in the editable fields of the document.

Working with Results

How do I work with my search results list?

While viewing your search results, you can perform many different tasks, including sorting, narrowing, or delivering your results. Additionally, you can add your results list to a work folder as well as view your results directly in Lexis Advance.

To do these different tasks:

1. Perform your search.
2. While viewing the contents of the Research Pane, do any of the following:

To...	Do This
View the results in a specific search tool, like Google or Bing	Click the link for the search tool in the **Source** list of options. Your choices might include Lexis Practice Advisor®, Lexis Advance®, Lexis Web®, Bing®, and Google™. Additional subcategories might be available based on what you select here.
Sort your results	Click the **Sort by** drop-down list and choose the sorting option you want.
Filter your results to a specific category, such as court or jurisdiction	Click the **Narrow by** drop-down list and choose the category on which you want to filter. To select multiple filters, choose **Select multiple**.
Add the results to a work folder	Click the **Add to Folder** button. (See How do I save my research and Lexis Advance® documents to a work folder?.)
Print, download, or email the results	Click the delivery button for the type of delivery you want. (See How do I deliver my Lexis for Microsoft Office® search results and documents?.)
View your results directly in Lexis Advance	Click **View in Browser**. (See How do I view my search results directly in Lexis Advance (and not the research pane)?.)

How do I work with a document I'm viewing?

Lexis® *for* Microsoft Office® provides many tools for working with a document you are viewing. For example, you can navigate the different parts of the document, add the document to a work folder, or deliver the document by downloading it, printing it, or emailing it. Additionally, you can view supporting documents related to the document.

To use tools for working with the document:

1. While viewing your search results, click the link for the document you want to view. The document is opened in a separate tab of the Research Pane.
2. Complete any of the following optional tasks:

   Note:
   Many of the options that are available depend on the type of document you are viewing.

To	Do This
Add the document to a work folder	Click **Add to Folder** and then provide the information required on the Add to Folder dialog box. (See How do I save my research and Lexis Advance® documents to a work folder?.)
Print, download, or email the document	Click the icon associated with the type of delivery you want to perform, and then provide the information required on that form. (See How do I deliver my Lexis for Microsoft Office® search results and documents?.)
Open the document and view it directly in Lexis Advance	Click **View in Browser** button. The document is opened in Lexis Advance. (See How do I view my search results directly in Lexis Advance (and not the research pane)?.)
View related cases	Click **Shepardize®** . The list of citing documents appears in the Research Pane.
Navigate through the sections of the document	Use the navigation options available for the type of document you are viewing. For example, if you are viewing a case, use the **Section** drop-down list to move between parts of the document.
View supporting documents	If it's available, click the **About this document** button. Related information (like related documents or court materials) appears in the list.

How do I work with my Lexis Practice Advisor® results?

Before You Begin:
This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

Once you either complete your search using Lexis Practice Advisor® , or you locate (via browsing) the documents available for a specific practice area, you can work with your results. As you view your results, you can filter based on document type, sort your results, deliver your results, and so forth.

To work with your results:

1. Perform your search by searching on a specific term or by browsing through practice area topics.
2. Using the options available based on your search, complete any of the following steps:

To...	Do This
View your results based on document type	Click the tab for the type of document you want to view. For example, to view available forms, click the **Forms** tab.
Add the results list from the page you are viewing to your work folder	Click the **Add to Folder** drop-down list and either select one of the most recent folders you've used, or select **Choose a folder** to review all available folders or create a new folder. See How do I save my research and Lexis Advance® documents to a work folder? for additional information.
Deliver the results list from the page you are viewing either via printing, downloading, or emailing	Click the icon for the delivery type you want to complete. See How do I deliver my Lexis for Microsoft Office® search results and documents? for additional information.
View the results directly in Lexis Advance	Click **View in Browser**. The results are displayed in Lexis Advance.
Sort the results	Click the **Sort by** drop-down list to choose your sorting option.
Filter your search results	Click the **Narrow By** drop-down list and choose the filter you want to apply.
View a specific document	Click the link for the document.
Complete an interactive form (as indicated by form fields throughout the document)	Click either **Edit in Browser** or **Open as a Word Document**. Then enter the required information in the editable fields of the document.

How do I view my search results directly in Lexis Advance (and not the research pane)?

When you perform research using Lexis® *for* Microsoft Office® , the results of your research appear, by default, in the Research Pane. At times, however, you may want to view your results directly in Lexis Advance.

To open Lexis Advance® from the ribbon:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis ribbon.
2. Click the **Lexis Advance®** button ( ). The Lexis Advance window appears.
3. Complete your research in the browser window.

To open Lexis Advance® from the Research Pane:

1. Using the options available in the Lexis® *for* Microsoft Office® ribbon, complete your research.
2. While viewing your search results in the Research Pane, click **View in Browser** button. The Lexis Advance window appears, showing the contents of the tab you were viewing in the Research Pane.
3. Complete your research directly in Lexis Advance.

How do I deliver my Lexis for Microsoft Office® search results and documents?

1. While viewing either your search results list or a specific document, click the button for the type of delivery you want to perform: **Print** ( ), **Download** ( ), or **Email** ( ).
2. Choose your delivery options by completing the form that appears.

How do I convert a PDF document to Microsoft Word format?

You can import a PDF document into Microsoft Word or Outlook® . This lets you use the other tools available in Lexis® *for* Microsoft Office® to closely examine PDF-based documents you receive from opposing counsel and identify research inconsistencies.

To import the PDF document using the LexisNexis ribbon in Word:

1. While viewing the document, in the **PDF** section of the ribbon, click the **Import** button ( ). The **Select PDF File** dialog box appears.
2. Browse to and select the PDF document you want to import.
3. Once selected, click **Open**. The document is imported into Word.

To import the PDF document using the LexisNexis ribbon in Outlook:

1. While in an Outlook email message that contains a PDF attachment, click the **Convert Attachments** button ( ). The **Convert to Microsoft Word** dialog box appears.
2. Select the PDF document you want to convert and click **OK**. The PDF document is converted and opened in Microsoft Word.

Performing Proofreading Tasks

About Proofreading Your Document Using Microsystems EagleEye

Lexis® *for* Microsoft Office® includes the third-party tool Microsystems EagleEye. This product lets you proofread your documents and correct terms that have been improperly used or defined, phrases that might be inconsistent, items that are incomplete, and references and numbering that are inconsistent.

The following options are available on the **Proofreading Tools** section of the ribbon:

Terms & Phrases

Defined Terms	This option reviews terms you've used in the document to make sure you have not created any ambiguity or inconsistency with how the terms are defined.
Definitions List	This option creates a list of legal terms and their associated definitions so you can analyze them. Additionally, you can compare the definitions in the current document with those in other documents as well.
Inconsistent Phrases	Using this tool, you can find commonly used phrases and resolve any inconsistencies in definitions you encounter.
References	This option lets you find references to defined terms, different document sections or documents, case law, or other references and resolve any issues or problems with them.

Accuracy

Editing Mistakes	This option helps you find and resolve errors like unpaired punctuation (missing parentheses, quotation marks, etc.).
Inconsistent Numbering	This tool locates and resolves numbering that is out of sequence.

Completeness

Mark Incomplete	Using this option, you can mark your documents for later review and completion.
Incomplete Items	Use this option to search the document for items you've marked "Incomplete" so that you can make your edits and mark the items as finished.

Full instructions on using these features can be found here:

Access the EagleEye Quick Reference Guide

How do I proofread my document?

You can use the Microsystems EagleEye tools to proofread your document. Instructions for completing these tasks can be found here:

Access the EagleEye Quick Reference Guide

You can view a brief overview of each tool here:

About Proofreading Your Document Using Microsystems EagleEye

Saving Work to Folders

How do I save my research and Lexis Advance® documents to a work folder?

You can save your Lexis® *for* Microsoft Office® research, including documents you find in your research, to your Lexis Advance work folder.

Note:
See How do I save my own Lexis for Microsoft Office® documents to a work folder? for instructions on saving documents you are drafting to a work folder.

1. Do one of the following:

To...	Do This
Either save one or more documents or save the results list (up to 50 documents or results in both cases)	a. Select the **Add to Folder** ( ) icon at the top of your results. A list of options for saving the results or documents appears. b. To save to a specific folder you've already created and used recently, choose that folder from the list. The documents are saved to the selected folder, and **no further steps are required**. c. To save to a new folder or a folder that's not appearing in your recently used list, select **Choose a folder**. Then **proceed to step 2**, below.
Save a document from the full document view	a. While viewing the full document, select the **Add to folder** ( ) icon at the top of the document. A list of options for saving the document appears. b. To save the document to a specific folder you've already created and used recently, choose that folder from the list. The document is saved to the selected folder, and **no further steps are required**. c. To save the document to a new folder or a folder that's not appearing in your recently used list, select **Choose a folder**. Then **proceed to step 2**, below.

2. At the **Add to Folder** dialog box, click the **Selected Documents** tab to review the documents you have selected. If you want to remove a document from a list that contains multiple documents, clear its check box.

   Note:
   To edit a title for a document, select **Edit all titles**, click in the box for the document you want to rename, and then enter the new text.

3. Select the **Save Options** tab to specify how you want the document to be saved:
   - To select whether to save the **Selected Documents** or your **Results list**, select the appropriate option.
   - To include a note with the saved documents, enter it in the **Notes** box.
   - To create a new folder for the document, select the folder where you want the new folder to be saved and then click **Create New Folder**.
   - To save the document or documents to a specific folder, select it in the list.
4. To share the folder with other users, select the **Share With Others** tab and then enter the name or email address of the person you want to share with. Then click **Add**.
5. Click **Save** to save your changes and save the document or documents to the folder.

The items will be saved for you to access from the **Work Folders** tool on the ribbon. See How do I open my work folders from Lexis® *for* Microsoft Office® ? for details.

How do I save my own Lexis for Microsoft Office® documents to a work folder?

Before You Begin:
This feature is available to users of Lexis® *for* Microsoft Office® 5.3 and later.

You can save the Lexis® *for* Microsoft Office® documents you are drafting to your Lexis Advance® work folders. You can access any documents you upload from the Lexis for Microsoft Office ribbon or from Lexis Advance. If you edit a document, you will need to upload it to your work folder again.

Note:
See How do I save my research and Lexis Advance® documents to a work folder? for instructions on saving your Lexis Advance research to a work folder.

To save documents you're drafting to your Lexis Advance work folders:

1. Save any changes you've made to the document you are drafting.
2. Click **Upload File** in the **Work Folders** section of the Lexis for Microsoft Office ribbon. The Upload File to Work Folders dialog box appears.
3. Select the folder you want to save the document to from the list of folders on the left.

   Note:
   To save the document to a new folder, select **My Folders** and then click the **New Folder** button. Provide the required information for creating a new folder.
4. Click **Upload** to finish uploading the document.

How do I open my work folders from Lexis® *for* Microsoft Office® ?

Note:

For instructions on saving research to your work folders, see How do I save my research and Lexis Advance® documents to a work folder?.

You can view records of research you've performed and saved to your work folders.

To view your work folders:

1. While viewing your Word document, click the **Open Folders** button. My Folders is opened.
2. Navigate to the specific folder you want to view.
3. Use the options available on the page to work with items in your folder.

Setting Lexis® *for* Microsoft Office® Options

How do I change my settings for working with Lexis for Microsoft Office?

When drafting your legal documents, you can choose certain default ways in which you interact with Lexis® *for* Microsoft Office® . For example, you can choose which jurisdiction you want to search by default, or you can define how lists of citations found in your document will be displayed in the Research Pane.

To do this:

1. While viewing the Lexis® *for* Microsoft Office® ribbon, click the **Options** drop-down list. The **LexisNexis® Options** dialog box appears.
2. Review the options available and make your selections, based on the following:

Option	Description
Sign-in Settings page	Select from the following options: ID Enter your user ID in this box. Password Enter the password for your user ID in this box. Sign In button Click this button to complete the sign-in process. Sign out If you are signed in to Lexis for Microsoft Office, click this link to sign out.
Analysis Tools page	From the **When I click "Find All" in the Analysis section of the ribbon, highlight** group of options, choose those options you want Lexis for Microsoft Office to recognize when it is analyzing your document and identifying the different entities.
Practice Advisor page **Note:** These settings are available to users of Lexis for Microsoft Office 5.3 and later.	Using the list of available practice areas, select those areas you want Lexis for Microsoft Office to search when using the Lexis Practice Advisor® search or browse tool.
Forms page **Note:** These settings are available to users of Lexis for Microsoft Office 5.3 and later.	Using the list of available practice areas, select those areas you want Lexis for Microsoft Office to search when using the Lexis Practice Advisor® Forms search or browse tool.
Jurisdiction page	To choose the default jurisdiction that will be suggested for your research, click the **Jurisdiction** drop-down list and choose the option that best suits you. **Note:** The option you choose here will be suggested for each search; however, you can change the jurisdiction on a search-by-search basis. You can do this using the **Narrow By** options while viewing your search results.
Get Cited Docs page	Click the **Show** drop-down list and choose how you want the citation list displayed: ■ **Cite by Cite** shows the full text of the cited case.

Option	Description
	■ **Citations List** shows just a list of the citation numbers. You can click a citation number to view the full document. ■ **Citations with Context** shows a list of citations, followed by the text of the case that relates to your research.
Citation Format page	Format Choose one of these options: **The Bluebook®** , **California**, or **New York** Case names in citations should be Choose either of these options: **Underlined** or **Italicized**. Never use "Id." format in short form citations Choose this option to keep Lexis for Microsoft Office from using Id. in short-form citations.
Table of Authorities page	Select your options for formatting a Table of Authorities. See How do I set my preferences for inserting a Table of Authorities? for details.

How do I define how citations will be formatted in my documents?

When drafting your legal documents, you can choose which style guide you want your cited references to follow. For example, you can elect to use rules defined in The Bluebook® to style and format your citations.

Your options include The Bluebook® , California style, and New York style.

To do this:

1. In the **Shepard's® Tools** group, choose the option from the **Set Cite Format** drop-down list. A confirmation message appears.
2. Click **Yes** to confirm your selection. Citations are updated to follow the selected format.

Tip:
You can specify a default option at LexisNexis Preferences. See How do I change my settings for working with Lexis for Microsoft Office? for details.

How do I set my preferences for inserting a Table of Authorities?

When drafting your legal document, you may need to include a Table of Authorities, which lists the cases and other legal sources you include in the document. You can specify the default behavior for inserting tables in your document.

To change your default settings for the Table of Authorities:

1. While viewing the LexisNexis® ribbon, click the **Options** button. The LexisNexis® Options dialog box appears.
2. Click the **Table of Authorities** link in the left navigation pane. The page changes to show the current settings.
3. Make your selections, based on the following options:

Option	Description
Table of Authorities Layout	Choose the type of Table of Authorities you want inserted in your document. Your options include **General purpose**, **Jurisdiction-specific**, or **Cases and statutes**. **Note:** Select **Separate federal and state citations** list federal and state citations separately in the Table of Authorities.
Sort entries in the Table of Authorities by	Click this drop-down list to choose how entries in the Table of Authorities will be sorted - either **Alphabetical** or by **Order of Appearance**. To keep the text "In re" and "Ex parte" from being considered when sorting, select **Remove 'In re' and 'Ex parte' from case citations when sorting**.
List citations mentioned in citing or quoting parentheticals separately	Select this option to list all citations mentioned in citing or quoting parentheticals as separate entries in your Table of Authorities. For example, if you select this option, the citation *United States v. Johnson, 988 F.2d 941, 945 (9th Cir. 1993) (citing United States v. Frady, 456 U.S. 152, 168 (1982))* would list *Frady* separately in the Table of Authorities. If you leave this option cleared, only *Johnson* will appear in the table.
Use Passim for [N] or more page references	Select this option to insert the word "Passim" when a certain number of cases are cited in your document. You can then specify the number of references before this reference is used.
Place party names on separate lines	Select if you want your table to list party names in the citation on a line separate from the rest of the citation.
Custom heading for overall Table of Authorities	Enter a custom title you want applied to the Table of Authorities
Overall Table of Authorities heading / Individual category headings / Entries	Specify the text formatting for headings and entries in your Table of Authorities by choosing the appropriate options from the font and text size options. Additionally, to apply styling options to the headings, click any of these options: bold, underline, italicize, and center.

4. Click **OK** to save your changes and return to the document.