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About Lexis® for Microsoft Office®

What is Lexis® for Microsoft Office®?

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, you can use the Background button to scan and highlight legal terms of art in your message. You can then click on these terms and use them in a Lexis Advance search query. Or, 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.

Note: For a complete list of the options available in both Microsoft Outlook and Microsoft Word, see Lexis® for Microsoft® Outlook® Ribbon and Lexis® for Microsoft® Word Ribbon, respectively.

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 prefer to conduct your research in a full-size browser window, you can launch the Research Browser, which includes a predefined list of search sites (such as Lexis Advance, Lexis® Web, Google™, and Bing®). You can also use it to search any site you choose on the open Web. You can launch this window directly from the Microsoft application you are working in, which allows you to transfer the research you were previously viewing in the Research Pane to the newly opened Research Browser window.

While viewing your research, you might want to pin (or bookmark) specific results. Saving your search results like this allows you to keep a record of what's important to you, as well as share it with colleagues or clients.

Additionally, you can review a trail of the different steps you've taken in your research by viewing the History Map. This map can also provide a record of your work which you can share with others.

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®:

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, motions, and pleadings, 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.

- **Pinning research**: You can pin (or bookmark) research items you find as you are using Lexis for Microsoft Office. Pinning lets you save research that will support your argument so you can pick up your research trail where you left off. Additionally, pinning lets you share your research with others. For example, you can include links to your research in an email message, or you can save your pinned items to disk. Finally, you can review your pinned items to quickly see if Shepard's Signal™ indicators have changed for a case you are relying on.

- **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.
System Requirements

Please see Lexis® for Microsoft Office® System Requirements to view the technical requirements for using Lexis® for Microsoft Office®.

Additionally, please note that when working with Microsoft® Word documents, the required document format is .DOCX. The .DOC format is not officially supported in Lexis for Microsoft Office.
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

<table>
<thead>
<tr>
<th>Law firm, corporate, and government users</th>
<th>1-888-539-4770</th>
</tr>
</thead>
<tbody>
<tr>
<td>Law school students and faculty</td>
<td>1-800-455-3947</td>
</tr>
<tr>
<td>Additional Customer Support options</td>
<td><a href="http://support.lexisnexis.com/imo/">http://support.lexisnexis.com/imo/</a></td>
</tr>
</tbody>
</table>

Microsoft® Product Help

| Telephone                              | 1-800-936-4900 |
| Web site                               | http://support.microsoft.com |
How do I sign in to Lexis® for Microsoft Office®?

In order to perform research using Lexis® for Microsoft Office®, you must first sign in to the Lexis Advance® service.

Note: If you are a new user (with a new ID and password), you must first set up your Lexis Advance profile and define your Lexis Advance preferences. Visit http://advance.lexis.com to do this.

To do this:

1. View the LexisNexis® ribbon. If you are not signed in, the LexisNexis® Preferences dialog box appears.
2. At the Sign-in Settings page, enter your Lexis Advance sign-in credentials (an ID and password) and click Sign In. You are signed in to the Lexis® for Microsoft Office® service.
3. Click OK to close LexisNexis® Preferences.

Note:
- If you are already signed in to the service but want to use different sign-in credentials, see How do I sign out of Lexis® for Microsoft Office® and sign in as another user?.
- If you have forgotten your password, you can reset it. To do this, click the Forgot password? link on the sign-in form.
How do I sign out of Lexis® for Microsoft Office® and sign in as another user?

You can sign out of Lexis® for Microsoft Office® and sign in as a different user. When you sign out of Lexis for Microsoft Office and sign in using a different ID, any links or pinned items in the Research Pane will be removed.

To do this:

1. While in either a Microsoft® Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the Preferences button ( ). The LexisNexis® Preferences window appears.
3. At the Sign-in Settings page, click I want to sign in with a different ID. A confirmation message appears.
4. Click OK to continue with the sign-out process. You are returned to the Lexis Advance® sign-in page.
5. Enter your new sign-in credentials and click Sign In. You are signed in to the Lexis for Microsoft Office service.
6. Click OK to close the LexisNexis® Preferences window.
How do I change the client associated with my research?

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 in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.

2. Click the Client button ( ). The Set Client ID dialog box appears.

3. Provide the required information on the form.

4. Click OK to save your changes and return to your document or email message.
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.
- Click the Index link to view a listing of all the topics in the help file, referenced by index keyword.
- 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, click the PDF 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

<table>
<thead>
<tr>
<th>To find documents containing ...</th>
<th>Enter...</th>
</tr>
</thead>
<tbody>
<tr>
<td>The phrase &quot;table of contents&quot;</td>
<td>&quot;table of contents&quot;</td>
</tr>
<tr>
<td>The word &quot;research&quot; or the phrase &quot;table of contents&quot; or both</td>
<td>research OR &quot;table of contents&quot;</td>
</tr>
<tr>
<td>The word &quot;research&quot; and the phrase &quot;table of contents&quot;</td>
<td>research AND &quot;table of contents&quot;</td>
</tr>
<tr>
<td>The word &quot;research&quot; but not the word &quot;lexisnexis&quot;</td>
<td>research NOT lexisnexis</td>
</tr>
</tbody>
</table>

### Searching the Help Using Wildcards and Fuzzy Searches

<table>
<thead>
<tr>
<th>Example Query</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>research</td>
<td>Keyword search for documents containing the word research.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>research*</td>
<td>Wildcard search for documents containing words that begin with the letters research. For example:</td>
</tr>
<tr>
<td></td>
<td>- researched</td>
</tr>
<tr>
<td></td>
<td>- researcher</td>
</tr>
<tr>
<td></td>
<td>- researches</td>
</tr>
<tr>
<td>smartlinks~</td>
<td>Fuzzy search for documents that contain words similar to <code>smartlinks</code> (e.g., SmartLinx).</td>
</tr>
</tbody>
</table>
# Lexis® for Microsoft® Outlook® Ribbon

The following buttons appear on the Lexis® for Microsoft® Outlook® ribbon:

<table>
<thead>
<tr>
<th>Button</th>
<th>What It Does</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Background</strong></td>
<td>Searches through the email and highlights names, legal terms of art, and citations. You can click these highlighted terms in the email to view related content in several different research sources, such as Lexis® Web, Lexis Advance®, Lexis® Firstlook (which includes cases, statutes, and analytical materials), Martindale-Hubbell®, and so forth.</td>
</tr>
<tr>
<td><strong>Suggest</strong></td>
<td>Analyzes text you have selected in the email message and generates a list of search results that relate to your search term.</td>
</tr>
<tr>
<td><strong>Search parameters and Search field</strong></td>
<td>Searches the selected source for the terms you enter in the search field and displays the results in the Research Pane. Search options include Lexis®, your computer, and the Web, including Google™, Bing®, and Lexis® Web. Or, you can search all of these sources together. Using this option, you can search on any term you enter.</td>
</tr>
<tr>
<td><strong>Convert Attachments</strong></td>
<td>Lets you select PDF attachments in the email message and convert them to Microsoft® Word format. This can make it easier to validate the research in the newly converted Word document and repurpose it for future use.</td>
</tr>
<tr>
<td><strong>Research Browser</strong></td>
<td>Opens a separate browser window dedicated to research. This may be useful if you want more space than the Research Pane provides to conduct your research. At the Research Browser window, you can use the Lexis Advance, Google™, Bing®, and Lexis® Web search engines for your research.</td>
</tr>
<tr>
<td><strong>History Map</strong></td>
<td>Shows your research history, including the linear path you took as you completed your research. This allows you to keep a record of what was done, either to share with colleagues/clients or to keep for your own reference. Additionally, the History Map can show when a Shepard's Signal™ indicator has changed, especially for a case you may be relying on.</td>
</tr>
<tr>
<td><strong>Pinned Items</strong></td>
<td>Shows a list of research items you have pinned (or bookmarked). While viewing this list, you can include links to the pinned items in an email so you can share your research findings with others, or you can save the pinned documents to disk so you can refer back to them. Pinning makes it easy to save research items that pique your interest.</td>
</tr>
<tr>
<td><strong>Pane</strong></td>
<td>Shows or hides the Research Pane.</td>
</tr>
<tr>
<td><strong>Preferences</strong></td>
<td>Opens the LexisNexis® Preferences dialog box where you can define your personal preferences for working with Lexis for Microsoft Office.</td>
</tr>
<tr>
<td><strong>Client ID</strong></td>
<td>Lets you change the client ID for the research you are performing.</td>
</tr>
<tr>
<td>Client</td>
<td>Opens the Lexis for Microsoft Office Help page, where you can see which version of the product you are using, provide feedback on the product, access the product's help file, and access support and training information.</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
# Lexis® for Microsoft® Word Ribbon

The following buttons appear on the Lexis® for Microsoft® Word ribbon:

<table>
<thead>
<tr>
<th>Button</th>
<th>What It Does</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Background" /></td>
<td>Searches through the document and highlights names, legal terms of art, and citations. You can click these highlighted terms in the document to view related content in several different sources, such as Lexis® Web, Lexis Advance®, Lexis® Firstlook (which includes cases, statutes, and analytical materials), Martindale-Hubbell®, and so forth.</td>
</tr>
<tr>
<td><img src="image" alt="Suggest" /></td>
<td>Analyzes text you have selected in the document and generates a list of search results that relate to your search term.</td>
</tr>
<tr>
<td><img src="image" alt="Search parameters and Search field" /></td>
<td>Searches the selected source for the terms you enter in the search field and displays the results in the Research Pane. Search options include Lexis®, your computer, and the Web, including Google™, Bing®, and Lexis® Web. Or, you can search all of these sources together. Using this option, you can search on any term you enter.</td>
</tr>
<tr>
<td><img src="image" alt="Shepardize® Cited Docs" /></td>
<td>Links all citations in your document and inserts Shepard's Signal™ indicators, where available. You can click these citations and view the related case in the Research Pane, or you can click a Shepard's Signal™ indicator to view the Shepard's report.</td>
</tr>
<tr>
<td><img src="image" alt="Get Cited Docs" /></td>
<td>Identifies all of the citations in the document and lists them in the Research Pane. You can view just the citations themselves, the citations followed by the text of the case that relates to your research, or the full text of the cited case. Shepard's Signal™ indicators help you determine whether the case is still &quot;good law&quot;.</td>
</tr>
<tr>
<td><img src="image" alt="Check Cite Format" /></td>
<td>Searches through the document, identifies all possible citations, and formats them correctly, based on the citation style guide you've associated with the document (using the Set Cite Format drop-down list). Once Lexis for Microsoft Office marks a citation, it becomes managed, meaning its long and short forms will be updated if you move the citation in the document, and it will automatically be included in a Table of Authorities, if you choose to create one.</td>
</tr>
<tr>
<td><img src="image" alt="Check Quotes" /></td>
<td>Searches through the document, identifies the quotations you've added to it, and attempts to verify their correctness.</td>
</tr>
<tr>
<td><img src="image" alt="Set Cite Format" /></td>
<td>Lets you specify the style guide you want to follow when inserting your quotations. Your options include The Bluebook®, California, and New York styles. Using this option, you can also remove all citation metadata from the document. (You may want to do this when you are finished drafting the document and ready to share it with others.)</td>
</tr>
<tr>
<td><img src="image" alt="Insert TOA" /></td>
<td>Prepares and inserts a Table of Authorities in the document, based on the information it knows about the citations you've included. (Any citations that are managed by Lexis for Microsoft Office will be included in the table.)</td>
</tr>
<tr>
<td><img src="image" alt="Searches Lexis® for cases that contain your selected terms" /></td>
<td>Searches Lexis® for cases that contain your selected terms.</td>
</tr>
<tr>
<td>Cases</td>
<td>Searches Lexis Advance for briefs, motions, and pleadings that contain your selected terms.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Briefs, Motions, &amp; Pleadings</td>
<td>Searches for clauses and contracts that contain your selected terms. Contracts can provide additional alternative language for documents you are drafting.</td>
</tr>
<tr>
<td>Clauses &amp; Contracts</td>
<td>Searches for model forms that contain your selected terms. Forms can help you draft your own transactional documents.</td>
</tr>
<tr>
<td>Samples &amp; Forms</td>
<td>Lets you select a PDF document and convert it to Microsoft Word format. This can make it easier to validate the research in the newly converted Word document and repurpose it for future use.</td>
</tr>
<tr>
<td>Import</td>
<td>Opens a separate browser window dedicated to research. This may be useful if you want more space than the Research Pane provides to conduct your research. At the Research Browser window, you can use Lexis Advance, Google™, Bing®, and Lexis® Web as search engines for your research.</td>
</tr>
<tr>
<td>Research Browser</td>
<td>Shows your research history, including the linear path you took as you completed your research. This allows you to keep a record of what was done, either to share with colleagues/clients or to keep for your own reference. Additionally, the History Map can show when a Shepard's Signal™ indicator has changed, especially for a case you may be relying on.</td>
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<tr>
<td>History Map</td>
<td>Shows a list of research items you have pinned (or bookmarked). While viewing this list, you can include links to the pinned items in an email so you can share your research findings with others, or you can save the pinned documents to disk so you can refer back to them. Pinning makes it easy to save research items that pique your interest.</td>
</tr>
<tr>
<td>Pinned Items</td>
<td>Shows or hides the Research Pane.</td>
</tr>
<tr>
<td>Pane</td>
<td>Opens the LexisNexis® Preferences dialog box where you can define your personal preferences for working with Lexis for Microsoft Office.</td>
</tr>
<tr>
<td>Preferences</td>
<td>Lets you change the client ID for the research you are performing.</td>
</tr>
<tr>
<td>Client</td>
<td></td>
</tr>
<tr>
<td>Help</td>
<td>Opens the Lexis for Microsoft Office Help page, where you can see which version of the product you are using, provide feedback on the product, access the product’s help file, and access support and training information.</td>
</tr>
</tbody>
</table>
Getting Started Using Lexis® for Microsoft Office®

**Note:**
The specific set of Lexis® for Microsoft Office® options available to each customer depends on the type of contract signed. This means you may see features described in this topic that you may not have access to. If you are interested in learning more about these features, please contact LexisNexis® Customer Support by calling 888-539-4770 or by visiting http://support.lexisnexis.com/imo.

While drafting your legal documents, you may spend hours researching your topic and carefully constructing the document so that it's legally sound. Using Lexis® for Microsoft Office® can help make this process easier. This help topic describes, in somewhat sequential order, some of the common tasks you might perform while using Lexis for Microsoft Office. (To see a complete list of the different tasks you can perform while using Lexis for Microsoft Office, click the Home link at the top of the Help window.)

This topic is divided into two sections:

- Using Lexis® for Microsoft Office® with Microsoft® Word
- Using Lexis® for Microsoft Office® with Microsoft® Outlook®

Using Lexis® for Microsoft Office® with Microsoft® Word

<table>
<thead>
<tr>
<th><strong>STEP 1: SETTING PREFERENCES</strong></th>
<th><strong>Topics to Explore</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The first thing you may choose to do once you install Lexis for Microsoft Office is review your program preferences, which define the settings you'll use as you step through the document drafting process. For example, if you want your citations to follow The Bluebook® format, or if you want your Lexis Advance® searches to focus primarily on your local jurisdiction (rather than federal), you can define these properties up front.</td>
<td>Setting Preferences for Using Lexis® for Microsoft Office®</td>
</tr>
</tbody>
</table>

- **Tip:** If you aren't sure which preferences you want to set right away, you can always revisit Preferences later - once you better understand
### STEP 2: DRAFTING YOUR DOCUMENT

Whether you’re starting with an existing document or creating a new one, Lexis for Microsoft Office provides tools in the Find Precedent section of the LexisNexis ribbon to help ensure your document is legally sound. You can search Lexis Advance for model clauses, contracts, and forms, which you can then use as the basis for your new document. You can also search briefs, pleadings, and motions for existing verbiage, which you can reference in your own document.

**Note:** As you identify research text you want to include in your document, you can **copy it from the Research Pane and paste it in your document**, and the correct citation will be included.

### STEP 3: PERFORMING YOUR RESEARCH

One of the benefits of using Lexis for Microsoft Office is you can perform research directly in Microsoft Word. When submitting your search query, you can either highlight language directly in the document text, or you can enter your search terms in a special search field. Your search results are displayed in

---

<table>
<thead>
<tr>
<th>Topics to Explore</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I search for clauses and contracts?</td>
</tr>
<tr>
<td>How do I search for samples and forms?</td>
</tr>
<tr>
<td>How do I view cases related to the document I’m drafting?</td>
</tr>
<tr>
<td>How do I view briefs, motions, or pleadings related to the document I’m drafting?</td>
</tr>
<tr>
<td>How do I identify companies, individuals, terms of art, and citations in my document or email message?</td>
</tr>
<tr>
<td>How do I perform research using selected text in my document or email message?</td>
</tr>
<tr>
<td>How do I search for content at Lexis Advance®?</td>
</tr>
<tr>
<td>How do I pin items in the Research Pane?</td>
</tr>
<tr>
<td>How do I view pinned items?</td>
</tr>
</tbody>
</table>
the Research Pane, which appears to the right of your document.

As you review your search results, you can use the pinning feature to save those searches you may want to review later.

**Tip:** As you cite your research while drafting your document, you can validate each citation as you enter it to make sure it is formatted correctly.

### STEP 4: FINALIZING AND VALIDATING YOUR DOCUMENT

The final step in the process is to review your work. Part of this final review is to check Shepard's Signal™ indicators to make sure cases you’ve cited still follow good law. Then, you should verify that all of your citations are formatted correctly, both in content and format. Finally, you can verify the accuracy of any quotations you’ve included. Lexis for Microsoft Office provides tools to help you do this.

One of the final steps, after verifying your citations and quotations, is to generate a Table of Authorities for the document.

---

**Using Lexis® for Microsoft Office® with Microsoft® Outlook®**

<table>
<thead>
<tr>
<th>Lexis for Microsoft Office includes several options for</th>
<th>Topics to Explore:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How do I identify citations within my Microsoft® Word document?</td>
</tr>
<tr>
<td></td>
<td>How do I check all citations within a document for correct formatting?</td>
</tr>
<tr>
<td></td>
<td>How do I check the validity of quotations in my document?</td>
</tr>
<tr>
<td></td>
<td>How do I insert a Table of Authorities in my document?</td>
</tr>
</tbody>
</table>
reviewing and responding to email. For example, you can search the text of an email message to identify companies, individuals, terms of art, or citations, as well as perform searches from the Microsoft Outlook toolbar on additional topics.

You can also convert PDF attachments you receive into Microsoft Word format so you can closely examine documents you receive from opposing counsel and identify research inconsistencies.

Finally, you can save your research and then include links to those pins in your email.

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I identify companies, individuals, terms of art, and citations in my document or email message?</td>
</tr>
<tr>
<td>How do I perform research using selected text in my document or email message?</td>
</tr>
<tr>
<td>How do I search for content at Lexis Advance®?</td>
</tr>
<tr>
<td>How do I convert a PDF document into Word format?</td>
</tr>
<tr>
<td>How do I pin items in the Research Pane?</td>
</tr>
<tr>
<td>How do I share pinned items with others?</td>
</tr>
</tbody>
</table>
Searching for Content Using Lexis® for Microsoft Office®

How do I identify companies, individuals, terms of art, and citations in my document or email message?

As you are drafting your document or email message, you can have Lexis® for Microsoft Office® 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. Search results may appear categorized in the following groups, depending on the highlighted terms: Snapshot, Definition by Lexis®, Lexis® Firstlook, and Web (which includes Lexis®, Bing®, and Google™). The Snapshot view shows the top results in each of these categories.

**Caution:**
The Background feature may not work in Word documents larger than 10 MB.

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

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.

2. In the Search Tools section of the ribbon, click the Background button ( ). Names, possible legal terms, and citations are marked in the document.

   **Note:**
   You can choose which types of terms you want highlighted when you click the Background button. See How do I set my search preferences? for details.

3. Click highlighted text to view information about that text. Categorized research results appear in the Research Pane.

4. While viewing the Research Pane, complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view additional information about a particular result</td>
<td>Click the link for that result. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To show or hide a particular category of research</td>
<td>Click the plus (+) or minus (−) icon for the category heading.</td>
</tr>
<tr>
<td>To view a full list of results</td>
<td>Click the View All link at the bottom of each category listing.</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon (●) appears. Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To close the tab once you are done reviewing your search results</td>
<td>Click ☐ in the upper-right corner of the tab.</td>
</tr>
</tbody>
</table>
How do I set my search preferences?

When using the **Background** feature to identify legal terms in your document or email message, you can set a preference for which types of data you want highlighted. For example, if you don't want to view company names, you can choose not to search for and highlight them.

**To choose which items to include in your Background search:**

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis ribbon.

2. Click the **Preferences** button (}). The LexisNexis® Preferences dialog box appears.

3. Click the **Advanced** link in the left navigation pane. The view changes to show advanced options.

4. From the list of options under **When I click “Background” from the Search Tools box, highlight**, select or clear the options you want included or excluded in the Background search.

5. Click **OK** to save your changes.
How do I perform research using selected text in my document or email message?

As you are drafting your document or email message, you may see terms or phrases used in the document you would like to use in a Lexis Advance® or other type of search. You can select the text and use Lexis® for Microsoft Office® to submit it as your search phrase. Search results may appear categorized in the Research Pane in the following groups: LexisNexis® Firstlook results (which includes Cases, Statutes, and Secondary Materials) and Web results (which includes Lexis® Web, Bing®, and Google™).

To search using selected terms in your document:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Select (or highlight) the text on which you want to search.
3. In the Search Tools section of the ribbon, click the Suggest button (🚀). Your highlighted search terms are submitted and your results are displayed in the Research Pane.
4. Review the list of results, and complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view additional information about a particular result</td>
<td>Click the link for that result.</td>
</tr>
<tr>
<td>To hide or show a particular category of research</td>
<td>Click the plus or minus icon for the category heading.</td>
</tr>
<tr>
<td>To view a full list of results</td>
<td>Click the View All link at the bottom of each category listing.</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon (📌) appears. Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To close the tab once you are done reviewing your search results</td>
<td>Click ✗ in the upper-right corner of the tab.</td>
</tr>
</tbody>
</table>
How do I search for content on my computer?

While drafting a document using the tools available in Lexis® for Microsoft Office®, you can search for files and documents on your local disk (including your Outlook® email message repository). The list of those items found will appear in the Research Pane. This might be useful if you need to quickly find locally stored content related to the document you are drafting. Your search results may include Microsoft Office files (such as .DOC, .PPT, .XLS, and so forth), .TXT files, .PDF files, and emails.

To search your local disk for files:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. In the Search Tools section of the ribbon, choose Search My Computer from the drop-down list.
3. Enter your search terms in the search box.
4. Click the Search button ( ). Files containing your search term are listed in the Research Pane.
5. Optionally, to view a file, locate it in the list and double-click it.
How do I search for content at Lexis Advance®?

You can use Lexis® for Microsoft Office® to perform legal research directly in your document or email message. One research service you can use is Lexis Advance®. Any results that are found appear in the Research Pane.

To research a topic using Lexis Advance:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. In the Search Tools section of the ribbon, choose Search Lexis® from the drop-down list.
3. Enter your search terms in the search box.
4. Click the Search button ( ). Your search results are displayed in the Research Pane.
5. Click the button for Cases, Legislative, or Admin Codes, depending on which type of documents you want to view. (To see the full list of content types, click the drop-down arrow next to the last option.)
6. Review the results, and complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view a specific case or document</td>
<td>Click the hyperlink associated with the case name. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To filter your search results by jurisdiction</td>
<td>Choose an option from the Jurisdiction drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Tip: To change the default search jurisdiction, see How do I change my default jurisdiction for searching?.</td>
</tr>
<tr>
<td>To rerun your search using different options, or to expand your search to include synonyms or other text equivalents</td>
<td>Choose the option you want from the Options drop-down list.</td>
</tr>
<tr>
<td>To view your search results in a separate browser window</td>
<td>Click the Open Research Browser button ( ).</td>
</tr>
<tr>
<td>To filter your search results</td>
<td>Click the Narrow by drop-down list and choose the filter you want to apply.</td>
</tr>
<tr>
<td>To sort your results in a different order</td>
<td>Choose your sorting option from the Sort by drop-down list.</td>
</tr>
<tr>
<td>To change how much of the document you can preview</td>
<td>Click one of the following buttons:</td>
</tr>
<tr>
<td></td>
<td>- Terms shows the section of the text that contains the terms on which you are searching</td>
</tr>
<tr>
<td></td>
<td>- Overview shows the overview section of the document</td>
</tr>
<tr>
<td></td>
<td>- Both shows both the paragraph of terms as well as the overview section</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon ( ) appears. Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous ( ) or Next ( ).</td>
</tr>
</tbody>
</table>
How do I search for content using Google™, Bing®, or Lexis® Web?

You can perform legal research from your document or email message using Google™, Bing®, or Lexis® Web as your search engine. Your search results will be displayed in the Research Pane.

To research a topic using Google™, Bing®, or Lexis® Web:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. In the Search Tools section of the ribbon, choose Search the Web from the drop-down list.
3. Enter your search terms in the search box.
4. Click the Search button ( ). Your search results are displayed in the Research Pane.
5. Click the Lexis® Web, Bing®, or Google™ button (located just below the tabs) to view the search results for that search engine.
6. Review the search results list, and complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view the details of a specific search result</td>
<td>Click the hyperlink associated with the result.</td>
</tr>
<tr>
<td>To view your search results in a separate browser window</td>
<td>Click the Open Research Browser button ( ).</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon appears ( ). Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous or Next. (The look of these buttons or links will vary, depending on which search engine you are viewing.)</td>
</tr>
<tr>
<td>(Lexis Web users only) To filter your search results</td>
<td>Choose your filtering options from the Narrow by list, located on the left side of the Lexis Web page.</td>
</tr>
</tbody>
</table>
How do I view and work with a full document?

When you select a document from your results, the full text of the document appears as a tabbed page in the Research Pane. The options available for working with the document you are viewing depends on the type of document you request.

Even though you’re viewing a specific document, your results list is still accessible from its original tab, so that as you continue your research, you can return to either one by clicking the appropriate tab.

To view and work with a document:

1. From your document or email message, complete your search.

2. While viewing your search results, click the link for the document name. The full document appears on a new tab in the Research Pane.

   **Note:**
   If the document is not within your subscription plan, you must confirm that you are willing to pay to view the document. Click **Access** if you want to proceed.

3. Complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view each of your search terms within the document</td>
<td>From the <strong>Navigate</strong> drop-down list, select either <strong>All Terms</strong> or one of your search terms. Then click the right or left arrows to go backward or forward in the document.</td>
</tr>
<tr>
<td>To view specific sections of the document</td>
<td>From the <strong>Jump to</strong> drop-down list, choose the section.</td>
</tr>
<tr>
<td>To view a specific case reporter</td>
<td>From the <strong>Reporter</strong> drop-down list, choose the case reporter you want to view. (This option applies to only cases, briefs, motions, or pleadings.)</td>
</tr>
<tr>
<td>To print, download, or email the document</td>
<td>Click the appropriate icon ( <img src="print.png" alt="print" /> <img src="download.png" alt="download" /> <img src="email.png" alt="email" />) and provide the information on the form that appears.</td>
</tr>
<tr>
<td>To pin the document so you can refer back to it or share it with others</td>
<td>Click the pin icon ( <img src="pin.png" alt="pin" />).</td>
</tr>
<tr>
<td>To close the tab once you are done reviewing your search results</td>
<td>Click <img src="close.png" alt="close" /> in the upper-right corner of the tab.</td>
</tr>
</tbody>
</table>
How do I convert a PDF document into Word format?

You can import a PDF document into Microsoft Word. 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 do this, you can import the PDF document using a ribbon button in either Microsoft® Word or Outlook®.

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

1. While in a Microsoft Word document, view the LexisNexis® ribbon.
2. In the PDF section of the ribbon, click the Import button ( ). The Select PDF File dialog box appears.
3. Browse to and select the PDF document you want to import.
4. 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, view the LexisNexis® ribbon.
2. In the PDF section of the ribbon, click the Convert Attachments button ( ). The Convert to Microsoft Word dialog box appears.
3. Select the PDF document you want to convert and click OK. The PDF document is converted and opened in Microsoft Word.
How do I view the Research Pane?

Once you are viewing research content in the Research Pane of your document or email message, you can hide and show this pane. For example, maybe you want to temporarily hide your research while you focus on the contents of the document you are drafting. Later, you might want to show the pane again so you can continue with or review your research.

To hide and show the Research Pane:

1. Either in your document or your email message, perform the type of research you are interested in. For example, complete one of the following types of searches:
   - Citations
   - Cases
   - Briefs, Motions, & Pleadings
   - Clauses & Contracts
   - Samples & Forms
   The Research Pane appears to the right of your document.

2. While viewing the LexisNexis ribbon, complete one of the following steps to hide or show the pane, as needed.
   - To hide the Research Pane if it is showing, click the Pane button ( ).
   - To show the Research Pane if it isn't visible, click the Pane button ( ) again.
How do I open a separate, dedicated research browser window?

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 in a larger window. Or, sometimes you want your legal research activities to be kept separate from other Web-based search activities. To do these things, you can open the Research Browser window. Within this window, you can perform many of the same tasks as you would in your regular Web browser window, such as adding additional sites to your Favorites bar, viewing your research history, and using the search box to search for any content available on the Web.

There are three ways you can open the Research Browser window. You can launch it from either the Lexis for Microsoft Office ribbon or the Research Pane. Or, if you selected to install them during the Lexis for Microsoft Office installation, you can launch it from a desktop or Start menu shortcut.

To open the Research Browser window from the ribbon:

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

To open the Research Browser window 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 the Open Research Browser button ( ). The Research Browser window appears, showing the contents of the tab you are viewing in the Research Pane.
3. Complete your research in the browser window.

To open the Research Browser window from a shortcut option:

Note: Shortcuts are only available if you selected to install them during the Lexis for Microsoft Office installation.

1. Locate the Research Browser shortcut, either on your desktop or on the Windows Start menu and click it. The Research Browser window appears.
2. Complete your research in the browser window.
How do I work in the Research Browser window?

Lexis® for Microsoft Office® allows you to perform your legal research in a dedicated browser window. From this window, you can perform research using Lexis Advance®, Lexis® Web, Google™, and Bing®. Using the Research Browser, you can perform many of the same tasks as you would in your regular Web browser window, such as:

- Add sites to your Favorites bar
- View a history of research you have performed in the Research Browser
- Simultaneously view multiple pages of information using the different tabs available
- Use the search box to search for any content available on the Web

To work inside the Research Browser:

1. **Open the Research Browser window.**
2. **Complete any of the following optional tasks:**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for content</td>
<td>Choose your search parameters (search all available resources, or search just Lexis Advance, your computer, or the Web) by choosing an option from the Search drop-down list. Then, enter your search terms in the search field and click the Search button (Search).</td>
</tr>
</tbody>
</table>
| Add the site you are viewing to your Favorites list | Click the **Add to Favorites** button (Add to Favorites) in your browser window.  
  **Important:** Bookmarks you've created in your other Web browsers will not be available in the Research Browser. Likewise, bookmarks you create while in the Research Browser will not be available in your other browsers. |
| View other Web sites you've bookmarked as a favorite | Either click the icon for the site you want to view in the Favorites bar, or click the **Manage Favorites and View History** button (Manage Favorites and View History) to view a drop-down list of your favorite Web pages. Then, click the link for the site you want to open. |
| View a history of sites you've viewed in the Research Browser | Click the **Manage Favorites and View History** button (Manage Favorites and View History), click the **History** tab, and then choose the page from the history you want to view.  
  **Important:** Only the research you perform in the Research Browser will be listed in History. Research you perform inside Microsoft Office will not be listed, nor will research you perform in your regular browser window. |
| Print a copy of the Web page you are viewing | Click the **Print** button (Print). The Print dialog box appears so you can specify your printing options. |
| View the Home page, which is Lexis Advance | Click the **Home** button (Home). You are taken to Lexis Advance.  
  **Note:** You cannot change the default Home page. It will always be Lexis Advance. |
<p>| Open a new tab | On the tab bar, click the right-most tab with the + icon. The new tab is opened. (You can then enter the URL you want to view in the Web address field, perform a new search, or click an existing Favorite to open it.) |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Tip:</strong> To close a tab, click the <code>x</code> icon in the upper-right corner of the tab.</td>
</tr>
</tbody>
</table>
How do I change my default jurisdiction for searching?

You can change the default jurisdiction you use when searching using Lexis® for Microsoft Office®.

To do this:

1. View the LexisNexis® ribbon.

2. Click the Preferences button ( ). The LexisNexis® Preferences dialog box appears.

3. Click the Jurisdiction link in the left navigation pane. The page changes to show the current jurisdiction.

4. Choose the new jurisdiction from the Jurisdiction drop-down list.

5. Click OK to save your changes and return to the document.

Note:
You can also change your jurisdiction on a search-by-search basis. While viewing Lexis Advance® content in the Research Pane, click the Jurisdiction drop-down button and choose a different jurisdiction from the list. This will update your current search results only.
How do I view the LexisNexis® ribbon in Microsoft® Word or Outlook®?

To perform legal research while using Microsoft® Word or Outlook®, you use the options available on the LexisNexis® ribbon.

To do this:

1. Open your Word document or your Outlook® email message.
2. Click the LexisNexis® tab. The ribbon changes to show the different options available for performing your research.

Note:
See either Microsoft® Outlook® Ribbon or Microsoft® Word Ribbon for explanations of how buttons on each of the ribbons work.
# Working with Citations in a Microsoft Word Document

## How do I identify citations within my Microsoft® Word document?

While drafting a document, you can identify citations you've included in the text. 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.

**Caution:**

The Shepardize® Cited Docs feature may not work in Word documents larger than 10 MB.

## To mark citations in your document:

1. While in a Microsoft Word document, view the LexisNexis® ribbon.

2. In the Shepard's® Citation Tools section of the ribbon, click the Shepardize® 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.

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

3. Complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view a case you are citing</td>
<td>Click the hyperlink. The Research Pane is opened on the right side of the document, and the case is displayed in it.</td>
</tr>
<tr>
<td>To view the Shepard's Summary for a citation</td>
<td>Click the indicator next to the hyperlink. The following indicators can help you determine the current standing of a case:</td>
</tr>
<tr>
<td></td>
<td>🔄 Warning: Negative treatment indicated</td>
</tr>
<tr>
<td></td>
<td>🎉 Question: Validity questioned by citing references</td>
</tr>
<tr>
<td></td>
<td>🔄Caution: Possible negative treatment</td>
</tr>
<tr>
<td></td>
<td>🔄Positive treatment is indicated</td>
</tr>
<tr>
<td></td>
<td>🔄Citing references with analysis are available</td>
</tr>
<tr>
<td></td>
<td>🔄Citation information is available</td>
</tr>
<tr>
<td>To change citations back to standard (non-hyperlinked) text</td>
<td>Click the Shepardize® Cited Docs button (✨) again.</td>
</tr>
</tbody>
</table>
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 display.

- 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 view citations in my document in list format?

You can view a list of all the citations in your document. When viewing this list, you can choose whether to view just the citation itself, the citation within its context, or the full case. Viewing a list of citations side by side with your document lets you review the text of the case you are citing, its subsequent treatment, and whether you’re working with "good law".

**Note:**
If a citation is recognized, but there is no exact match in *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 via Lexis Advance so you can identify the correct *Shepard's* report for your citation.

**Caution:**
The Get Cited Docs feature may not work in Word documents larger than 10 MB.

To pull a list of citations from the document and view them in the Research Pane:

1. While in a Microsoft Word document, view the LexisNexis® ribbon.

2. In the *Shepard's* Citation Tools section of the ribbon, click the Get Cited Docs button ( pantalla). The Research Pane appears, showing the case associated with the first citation in your document.

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

3. Complete any of the following optional steps:

   **Option** | **Description**
   --- | ---
   To filter the list to show only cases that have a specific type of analysis (for example, Positive, Caution, etc.) | Choose the analysis from the Navigate drop-down list.
   To move between cases or pages of results in the list | Click the Next button ( ▶️) or the Previous button ( ▲ ).
   **Tip:**
   Depending on which case you are viewing in the Research Pane, the corresponding citation in the document is highlighted.
   To change how much of the case detail you are viewing | Choose an option from the Show drop-down list:
   - **Cite by Cite** shows the full text of the cited case.
   - **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.
   To print, email, or save to disk a citation or list of citations you are viewing in the Research Pane | Click the delivery option you want and then enter the information needed to complete the delivery.
   **Note:**
   Delivery options may not be available for each type of list you view.
   To pin a specific citation ( ⬇️) so you can refer back to it or share it with others | Click the pin associated with the result you want to save.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note:</td>
<td>Pinning options may not be available for each type of list you view.</td>
</tr>
</tbody>
</table>

**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 display.
- 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 specify how my citations should be formatted?

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. View the LexisNexis® ribbon.

2. In the Shepard's® Citation Tools group, choose the option from the Set Cite Format drop-down list. A confirmation message appears.

3. Click Yes to confirm your selection. Citations are updated to follow the selected format.

Tip: You can specify a default option at LexisNexis Preferences.
How do I change which style I'm using for marking my citations?

When drafting a legal document, you select which style guide should be used for formatting the document. For example, if you want your document to use The Bluebook® as its formatting guide, you would choose The Bluebook® as the Cite Format. At times, however, you may want to choose a different citation format. When you do this, you must update the document to use the new format.

To update the citations in your document to a different format:

1. View the LexisNexis® ribbon.

2. In the Shepard’s® Citation Tools section of the ribbon, click the Set Cite Format button ( ) and choose the new option you want to use. A message appears, asking you to confirm that you want to convert the citations to the new format.

3. Click Yes to accept the changes. The citations are reformatted.
How do I check all citations within a document for correct formatting?

At any point in the document-drafting process, you may want to check the citations in your document to make sure they are formatted correctly. Lexis® for Microsoft Office® includes a tool that allows you to search through the document and identify all potential cites. If Lexis for Microsoft Office detects problems with the citation, it can offer suggestions for correcting it.

Once you review each citation and decide how you want it formatted in the document, the citation becomes managed. This means that Lexis® will keep track of the citation for you and update its long and short form if the citation is referenced multiple times in the document. Also, Lexis for Microsoft Office will automatically include the citation 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.

For example, say you have referenced a case in your document and the citation you have used is marked as correct - maybe because it was correct to begin with or because you’ve applied the suggested format from Lexis. When you choose to use this citation in your document, it becomes confirmed as correct, and it will be listed in the main section of the Table of Authorities. Additionally, if you reference the citation multiple times throughout your document, the long and short form of each reference will be updated accordingly.

However, maybe you have a different citation in your document whose format you want to appear a specific way - one that doesn't match a specific Lexis format. Or maybe Lexis for Microsoft Office is unable to suggest a valid format for the citation you are reviewing. You can still use this citation in your document and Lexis for Microsoft Office will manage its long and short form, but since its format isn’t recognized by Lexis, it will be marked as confirmed, but incorrect. It will be listed in the “Other” section of the Table of Authorities.

Confirmed citations become active fields in the document.

To do this:

1. View the LexisNexis® ribbon.
2. Make sure you do not have any text highlighted in the document and click the Check Cite Format button ( ). The Check Cite Format dialog box appears.

   Note:
   - See About the Check Cite Format Dialog Box for a more detailed description of the different elements of this dialog box.
   - To show only a specific subset of citations in the list, choose the option you prefer from the Show drop-down list.

3. Review the text in both the Citation and the Suggestions fields.
4. If the text you are reviewing in the Citation box is already using a correct format, click Use This. The citation is marked as confirmed and no changes are made to the underlying document text.
5. If Lexis for Microsoft Office is suggesting a different citation format than what you have used (including indicating that no suggestion is available), choose one of the following options:
   - To use the suggestion from LexisNexis, select Suggestions, click Apply, and then click Use This. The suggested citation is confirmed and updated in the document.
   - To edit the suggestion from LexisNexis, select Edit suggestion, make your changes to the citation, click Apply, and then click Use This. The modified citation is confirmed and updated in the document.
   - To edit the text you originally had in the document, select Edit my original and make your changes. Then click Apply, followed by Use This. The modified citation is confirmed and updated in the document.
6. If LexisNexis added text to the citation that isn’t part of the citation, select **Edit cite boundaries**, then highlight the text you consider part of the citation. Once highlighted, click **Apply**, followed by **Use This**. The citation is confirmed and updated in the document.

7. If the text you are reviewing is not a citation, click **Not a Citation**. The text is no longer considered a citation and will not be included in citation lists.

8. Optionally, complete any of the remaining steps:
   - Click **Get the suggested document** to view the associated case document in the Research Browser.
   - Click **Search Lexis Advance® on my own** to search for this document and related content at Lexis Advance®.
   - Click **Undo Last** to return to the previous citation and undo any changes made to it.

**Tip:**
To view full details of a citation, including its long form as well as the original text if the citation was corrected, right-click on the citation and choose **See Citation Details** from the shortcut menu.
Other Options Available in the Check Cite Format Pane

The Check Cite Format pane is a feature available in Lexis® for Microsoft Office® version 4.2 and later. If you are interested in upgrading to this version, please contact your sales representative. Otherwise, please see About the Check Cite Format Dialog Box for details about the options available in the Check Cite Format dialog box.
How do I set my preferences for citation formats?

When drafting your legal documents, you can identify the default style guide you want your cited references to follow. (Even though you specify a default selection, you can change your selection on a per-document basis, as needed.)

You can also specify whether case names should be italicized or underlined in the document, as well as choose to keep from using "Id." to identify short-form citations.

**Note:**

These settings will be applied to all new documents you create, as well as documents that do not have a specific format assigned. If a document already has a format applied, that format will be used.

**To do this:**

1. View the LexisNexis® ribbon.

2. In the Shepard's® Citation Tools section of the ribbon, click Set Cite Format and choose Format Options from the drop-down list. The LexisNexis® Preferences window appears, showing the options for Citation Format.

3. Make any of the following changes:
   - To specify the default format, choose the option you want from the Default format drop-down list. Options include The Bluebook®, New York style, and California style. This option will be selected by default for documents that do not already have a format applied.
   - Select Underlined or Italicized from Case name in citations should be. This will determine whether case names will be underlined or italicized.
   - To keep Lexis for Microsoft Office from using Id. in short-form citations, select Never use "Id." format in short-form citations.

4. Click OK to save your changes.
How do I remove metadata associated with the citations in my 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. If the Check Citation Format, Check Quotes, or Prepare TOA pane is open, close it.

2. View the LexisNexis® ribbon.

3. In the Shepard’s® Citation 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.

4. 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 copy text from a case I want to cite and paste it into my document?

At times, you may want to use some of the text you are reviewing in the Research Pane or Research Browser 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 move cited text within my 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 your citations, Lexis for Microsoft Office can automatically update any references that require it.

To do this:

**Note:** You must first check the format of citations in your document before you can move cited text around in your document.

1. While editing your document, highlight the text you want to move.
2. Using your mouse, drag the highlighted text to the new location in the document. The text is moved and the citation is updated. For example, if you are moving a portion of a quote to a location later in the document, the citation will be updated to include the "Id." abbreviation.

**Tip:**
To view full details of a citation, including its long form as well as the original text if the citation was corrected, right-click on the citation and choose See Citation Details from the shortcut menu.
How do I check the validity of quotations in my document?

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 is 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.

To do this:

**Note:** You must first verify the format of all citations in your document before you can check your quotations.

1. While in a Microsoft Word document, view the LexisNexis® ribbon.
2. Click the Check Quotes button ( ) in the Shepard’s® Citation Tools section of the ribbon. The document is scanned for quotations and the Check Quotes dialog box appears. The top field in the dialog box shows the quotation you have in your document, while the bottom field shows the suggested quotation from Lexis for Microsoft Office. Differences between the two quotations are marked using red and green.
3. Click the Review drop-down button and choose either All quotes (which reviews all quotations in the document) or Conflicting quotes only (which reviews only those quotes that are different from the original source).
4. Select an option, based on the following:
   - To keep the quotation from being changed in the document, click Keep.
   - To change the quoted text, select one of the following options, and then click Change:
     - Select Use original source text to replace the text in your document with that from the original source document.
     - Select Keep [and mark] my altered text to continue using the text you’ve specified in the document, but have Lexis for Microsoft Office mark the changes you’ve made to the quotation using brackets and/or ellipses.
     - Select Manually edit to edit the text yourself before replacing it in the document.

**Note:** If Lexis for Microsoft Office finds an incorrect citation associated with a quotation, it provides options for correcting the citation. To keep the citation from being changed in the document, click Keep. To change the citation to the corrected version, click Change. To view the quoted text in the source document, click Get Document. (See the details in How do I check all citations within a document for correct formatting? for more information on what each of these options means.)
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.

**To do this:**

1. While in a Microsoft Word document, view the LexisNexis® ribbon.
2. Place your cursor in the document where you want the Table of Authorities to be inserted.
3. Click the **Insert TOA** button ( ) in the *Shepard’s® Citation Tools* section of the ribbon. The Insert Table of Authorities dialog box appears.
4. Specify how you want the Table of Authorities formatted by selecting the following options:
   - To control the order authorities are sorted in the document yourself, select **General-purpose Table of Authorities**, and then specify the sort order.
   - To allow the courts to specify the order authorities are sorted in the document, select **Jurisdiction-specific Table of Authorities**, and then specify which jurisdiction the document will be filed with.
5. Optionally, to use the option you selected in Step 4 by default, select **From now on, skip this step and use this selection as my default choice**. (You can change this in the future at LexisNexis® Preferences > Tables of Authorities.)
6. Click **Insert**. The table is inserted in the document.

**Note:** You must first verify the format of all citations in your document before you can generate a Table of Authorities.

**Note:** You should first verify the format of all citations in your document before you generate a Table of Authorities.

To update your Table of Authorities, perhaps because you edited the document further, click the **Update TOA** button ( ). (This table is automatically updated every time you specifically save the document or when you print it.)
How do I change my default Table of Authorities preferences?

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. View the LexisNexis® ribbon.
2. Click the Preferences button. The LexisNexis® Preferences dialog box appears.
3. Click the Table of Authorities link in the left navigation pane. The page changes to show the current settings.
4. Make your selections, based on the following options:
   - To be prompted to specify the Table of Authorities format each time you insert a table in a document, select Display a window each time that asks which format I want to use.
   - To use a default format for your Table of Authorities, select Don't display a window each time; instead use the format below, and then specify which options you want:
     - To control the order authorities are sorted in the document yourself, select General-purpose Table of Authorities, and then specify the sort order.
     - To allow the courts to specify the order authorities are sorted in the document, select Jurisdiction-specific Table of Authorities, and then specify which jurisdiction the document will be filed with.
5. Click OK to save your changes and return to the document.
How do I link citations in my document to documents on Lexis Advance®?

**Note:**
The options described below are available in Lexis® for Microsoft Office® version 4.4 and later. Please contact your sales representative if you are interested in upgrading your license to this version.

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:**

1. View the LexisNexis® ribbon.

2. 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 print or email citation, quotation, and Table of Authorities reports?

**Note:**
The options described below are available in Lexis® for Microsoft Office® version 4.4 and later. Please contact your sales representative if you are interested in upgrading your license to this version.

When you view any of the following reports, you can either email a copy of the report to others or you can print a copy of it:

- Check Cite Format report
- Check Quotes report
- Table of Authorities report

**To email a copy of the report:**

1. Either check the format of citations or check the quotations in your document, or generate a Table of Authorities. The report you want to view is displayed in the right-side pane.
2. Review the contents of the pane, making any updates you choose.
3. Click the **Email** icon ( ), located in the upper-right corner of the pane. An email message is opened.
4. Complete the email and send it.

**To print a copy of the report:**

1. Either check the format of citations or check the quotations in your document, or generate a Table of Authorities. The report you want to view is displayed in the right-side pane.
2. Review the contents of the pane, making any updates you choose.
3. Click the **Print** icon ( ), located in the upper-right corner of the pane. The Print dialog box is opened.
4. Select your printing options and print the document.
Finding 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 in a Microsoft Word document, view the LexisNexis® ribbon.
2. In the document, highlight the text on which you want to search.
3. In the Find Precedent section of the ribbon, click the Cases button ( ). Cases related to your search phrase appear in the Research Pane.
4. Review the list of cases, and complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view a specific case</td>
<td>Click the hyperlink associated with the case name. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To filter your search results by jurisdiction</td>
<td>Choose an option from the Jurisdiction drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Tip: To change the default search jurisdiction, see How do I change my default jurisdiction for searching?.</td>
</tr>
<tr>
<td>To view your search results in a separate browser window</td>
<td>Click the Open Research Browser button ( ).</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon appears ( ). Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To filter your search results</td>
<td>Click the Narrow by drop-down and choose the filter you want to apply.</td>
</tr>
<tr>
<td>To sort your results in a different order</td>
<td>Choose your sorting option from the Sort by drop-down list.</td>
</tr>
<tr>
<td>To rerun your search using different options, or to expand your search to include synonyms or other text equivalents</td>
<td>Choose the option you want from the Options drop-down list.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous ( ) or Next ( ).</td>
</tr>
<tr>
<td>To change how much of the document you view in the results list</td>
<td>Click Terms, Overview, or Both.</td>
</tr>
</tbody>
</table>
How do I view briefs, motions, or pleadings related to the document I'm drafting?

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, motions, and pleadings:

1. While in a Microsoft Word document, view the LexisNexis® ribbon.
2. In the document, highlight the text on which you want to search.
3. In the Find Precedent section of the ribbon, click the Briefs, Motions, & Pleadings button ( ). Documents related to your search phrase appear in the Research Pane.
4. Review the list of documents, and complete any of the following optional steps:

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>To view a specific document</td>
<td>Click the hyperlink associated with the document name. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To filter your search results by jurisdiction</td>
<td>Choose an option from the Jurisdiction drop-down list.</td>
</tr>
<tr>
<td>Tip:</td>
<td>To change the default search jurisdiction, see How do I change my default jurisdiction for searching?.</td>
</tr>
<tr>
<td>To view your search results in a separate browser window</td>
<td>Click the Open Research Browser button ( ).</td>
</tr>
<tr>
<td>To pin a specific item of research so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the research title. A pin icon ( ) appears. Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To filter your search results</td>
<td>Click the Narrow by drop-down and choose the filter you want to apply.</td>
</tr>
<tr>
<td>To sort your results in a different order</td>
<td>Choose your sorting option from the Sort by drop-down list.</td>
</tr>
<tr>
<td>To rerun your search using different options, or to expand your search to include synonyms or other text equivalents</td>
<td>Choose the option you want from the Options drop-down list.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous ( ) or Next ( ).</td>
</tr>
</tbody>
</table>
How do I search for clauses and contracts?

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 in a Microsoft Word document, view the LexisNexis® ribbon.
2. In the document, highlight the text on which you want to search.
3. In the Find Precedent section of the ribbon, click the Clauses & Contracts button ( ). Documents related to your search appear in the Research Pane.
4. Click one of the following tabs to show only documents found using that search engine: Lexis®, Lexis® Web, Bing®, or Google™.
5. Complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view a specific document</td>
<td>Click the hyperlink associated with the document you want to review. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To move between the different documents or pages you are viewing</td>
<td>Click either the Previous or Next buttons or links. (The look of these buttons or links may change, depending on which search service you are viewing.)</td>
</tr>
</tbody>
</table>
| To navigate between pages in each individual search engine | Use the navigation buttons:  
  - Click ⬅️ to move to the previous page you viewed in the Research Pane  
  - Click ➤️ to move to the next page you viewed in the Research Pane  
  - Click ⬝️ to refresh the page you are viewing  
  - Click ❌️ to stop the page from loading |
| To filter your search results (Lexis and Lexis Web searches only) | Click the Narrow by drop-down and choose the filter you want to apply. |
| 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 Options drop-down list. |
| To view your search results in a separate browser window | Click the Open Research Browser button ( ). |
| To pin a specific item of research so you can refer back to it or share it with others | Rest your mouse pointer to the right of the research title. A pin icon appears ( ). Click this pin to bookmark the research. |
How do I search for samples and forms?

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 a Microsoft Word document, view the LexisNexis® ribbon.
2. In the document, highlight the text on which you want to search.
3. In the Find Precedent section of the ribbon, click the Samples & Forms button ( ). Documents related to your search appear in the Research Pane.
4. Click one of the following tabs to show only documents found using that search engine: Lexis®, Lexis® Web, Bing®, or Google™.
5. Complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To view a specific document</td>
<td>Click the hyperlink associated with the document you want to review. (See How do I view and work with a full document? for details.)</td>
</tr>
<tr>
<td>To filter your search results (Lexis and Lexis Web searches only)</td>
<td>Click the Narrow by drop-down and choose the filter you want to apply.</td>
</tr>
<tr>
<td>To sort your results in a different order</td>
<td>Choose your sorting option from the Sort by drop-down list.</td>
</tr>
<tr>
<td>To rerun your search using different options, or to expand your search to include synonyms or other text equivalents</td>
<td>Choose the option you want from the Options drop-down list.</td>
</tr>
<tr>
<td>To view the next document, set of documents, or set of pages in your search results</td>
<td>Click either the Previous or Next buttons or links. (The look of these buttons or links may change, depending on which search service you are viewing.)</td>
</tr>
</tbody>
</table>
| To navigate between pages in each individual search engine | Use the navigation buttons:  
  ▪ Click ← to move to the previous page you viewed in the Research Pane  
  ▪ Click → to move to the next page you viewed in the Research Pane  
  ▪ Click ⇔ to refresh the page you are viewing  
  ▪ Click ✗ to stop the page from loading |
<p>| To view your search results in a separate browser window | Click the Open Research Browser button ( ). |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To pin a specific item of research so you can refer back to it or share it with others</strong></td>
<td>Rest your mouse pointer to the right of the research title. A pin icon appears (📌). Click this pin to bookmark the research.</td>
</tr>
</tbody>
</table>
How do I filter my search results?

If your search has resulted in a large answer set, you can narrow your results to the documents most relevant to your search by using any of the filters in the Narrow by... drop-down list above your results.

For example, you can use the Search Within Results filter to find documents within your results that contain specific search terms. For example, if you entered the search terms: dog bite liability and your answer set is very large, you might enter the terms: assumed risk to narrow the results to only documents that also contain those terms. Or, you can use the other filters, such as Source, Jurisdiction, Timeline, Practice Areas & Topics, etc. to narrow your results to cases in your jurisdiction, a specific time frame, etc. The filters that are available for narrowing your results depend on what kind of search you ran and what types of content your results contain.

To use post-search filters to refine your search results:

1. Complete your search.

2. While viewing the Research Pane, click the Narrow by drop-down button. A list of post-search filters appears.

3. Choose the filter you want to apply to your search results by clicking the filter heading and selecting the specific filter you want to apply from the list of options.

   **Note:** To narrow your results by more than one category under a filter, click Select multiple, select the check boxes for the categories you want to narrow your results to, and click OK.

   **Note:** To remove a specific post-search filter, click the Close icon ( ) next to your selections at the top of the Narrow by drop-down list. To clear all of your post-search filters, click the Clear All link next You've selected at the top of the Narrow by list.

   Each time you narrow your results, the results are cumulative. For example, you can narrow your results to Cases, then to a specific timeline within those cases, and then to a specific jurisdiction or court within those cases in the timeline.
Viewing a History of Your Research Steps

How do I allow Lexis® *for Microsoft Office®* to document my research?

Lexis® *for Microsoft Office®* can document each step of your research process. This might be useful if you want to revisit a specific research step. You can share this information with your colleagues or clients. You can also use this information to determine if a *Shepard's Signal™* indicator has changed on a case you are citing in your document. In order to track your research history like this, you must first specify a preference that allows this History Map to be created.

**Note:**

This preference is selected by default when Lexis for Microsoft Office is installed.

**To do this:**

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the Preferences button (⚙️). The LexisNexis® Preferences dialog box appears.
3. Click the History Map link in the left navigation pane.
4. Select Create a History Map for Word documents and Outlook® messages.
5. Click OK to close the LexisNexis® Preferences dialog box and return to your document or email message.
How do I view a map of my research history?

Lexis® for Microsoft Office® tracks and records each step of your research process in the History Map. You can review this map to see your research trail. This might be useful if you want to revisit a specific research step. Additionally, you can share this information with your colleagues or clients, or you can use this information to determine if a Shepard's Signal™ indicator has changed on a case you are citing in your document.

**Note:**

Before you view your History Map, make sure you have specified the preference for creating the History Map. See How do I allow Lexis® for Microsoft Office® to document my research? for details.

To view the History Map:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the History Map button ( ). The Research Browser window appears, showing the History Map tab.
3. Complete any of the following optional steps:
   - Understand and navigate the contents of the map
   - Edit the contents of the map
   - Save the map as an image file
# Understand the History Map

The following information can help you understand and navigate the contents of the History Map:

<table>
<thead>
<tr>
<th>Feature</th>
<th>What It Looks Like</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event nodes</td>
<td><img src="image" alt="Event Node Example" /></td>
<td>Each node in the history map represents a particular point of research you performed while editing the document or message. For example, the node shows the type of research you performed (for instance, a search for a specific citation, etc.) or the action that was taken. When you rest your mouse pointer on the node, the search terms appear in the tooltip text.</td>
</tr>
<tr>
<td>Lines between event nodes*</td>
<td><img src="image" alt="Line between Event Nodes" /></td>
<td>Each node is connected by a line, which indicates the progression of the research. For example, as you browse through your research, each item you view is included in the line. Where you branch in your research, the line in the history map likewise branches. Note: *Lines have been changed to red for this demonstration. In the History Map, they appear black.</td>
</tr>
<tr>
<td>Expand / collapse your research nodes</td>
<td><img src="image" alt="Expand/Collapse Icon" /></td>
<td>Each node in your research history can be expanded or collapsed. For example, maybe you want to temporarily hide a particular research path. To do this, click the Collapse icon ( ▼ ) next to the node you want to hide. That node (and any others following it) is hidden. To show the node again, click the Expand icon ( ▲ ).</td>
</tr>
<tr>
<td>Shepard's Signal™ indicators</td>
<td><img src="image" alt="Shepard's Signal Indicator" /></td>
<td>When viewing cases in the History Map, Shepard's Signal™ indicators appear next to the case name. These indicators help you know the current status of the case. When a case status has changed since you first viewed it, the updated information appears below the node.</td>
</tr>
<tr>
<td>Pinned items and notes</td>
<td><img src="image" alt="Pinned Item and Note" /></td>
<td>When performing your research in the Research Pane, you can pin research items and then add notes to the items. While viewing the History Map, you can view which items you have pinned, as well as view any notes you have associated with the research. The pin and note icons appear next to the item name.</td>
</tr>
<tr>
<td>Save History Map</td>
<td><img src="image" alt="Save History Map Icon" /></td>
<td>You can save a copy of the History Map as an image file, which you can share.</td>
</tr>
<tr>
<td>Remove research nodes from the map</td>
<td>You can remove items from the History Map. These nodes and any subsequent items of research will be hidden in the map. (You can choose to view them again later.)</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>with others or keep as a record of your research.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How do I remove research items from the History Map?

While viewing the History Map, you can remove research items from the map. For example, you may decide a particular branch of research is no longer relevant to the document. Using the options available in the History Map, you can delete those items. Once you edit the map, you can choose between viewing the original, unedited map (which contains the original research nodes), or viewing the edited map (which shows the map without the research nodes you deleted).

To edit the History Map:

1. **Open the History Map.**

2. **Click the Edit Activities in Map button ( ).**

3. Rest your mouse pointer over the research node you want to remove. A **Hide Branch** icon ( ) appears.

4. Click the icon to remove the research item. The research is hidden.

   **Note:** If you make a mistake, you can add the research node back to the branch. To do this, click the **Undo** button ( ).

5. When you are finished editing the map, click the Edit Activities in Map button ( ) again.

6. Once you have removed research nodes in the map, you can view them again by choosing **Complete History Map** from the View drop-down list.
How do I save a copy of the History Map?

You can save a copy of the History Map. This may be useful if you want to keep a separate record of your research, or if you want to share your research trail with a colleague or client. The file will be saved as a graphic image, in .PNG format.

To save your research history as an image file:

1. Open the History Map.
2. Click the **Save a copy of this map** button ( ). The **Save As** dialog box appears.
3. Browse to the location where you want to save the file and enter a name in the **File name** box.
4. Click **Save**. The file is saved to the location you specified.
Using the Dedicated Research Browser

How do I open a separate, dedicated research browser window?

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 in a larger window. Or, sometimes you want your legal research activities to be kept separate from other Web-based search activities. To do these things, you can open the Research Browser window. Within this window, you can perform many of the same tasks as you would in your regular Web browser window, such as adding additional sites to your Favorites bar, viewing your research history, and using the search box to search for any content available on the Web.

There are three ways you can open the Research Browser window. You can launch it from either the Lexis for Microsoft Office ribbon or the Research Pane. Or, if you selected to install them during the Lexis for Microsoft Office installation, you can launch it from a desktop or Start menu shortcut.

To open the Research Browser window from the ribbon:

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

To open the Research Browser window 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 the Open Research Browser button ( ). The Research Browser window appears, showing the contents of the tab you are viewing in the Research Pane.
3. Complete your research in the browser window.

To open the Research Browser window from a shortcut option:

Note: Shortcuts are only available if you selected to install them during the Lexis for Microsoft Office installation.

1. Locate the Research Browser shortcut, either on your desktop or on the Windows Start menu and click it. The Research Browser window appears.
2. Complete your research in the browser window.
How do I work in the Research Browser window?

Lexis® for Microsoft Office® allows you to perform your legal research in a dedicated browser window. From this window, you can perform research using Lexis Advance®, Lexis® Web, Google™, and Bing®. Using the Research Browser, you can perform many of the same tasks as you would in your regular Web browser window, such as:

- Add sites to your Favorites bar
- View a history of research you have performed in the Research Browser
- Simultaneously view multiple pages of information using the different tabs available
- Use the search box to search for any content available on the Web

To work inside the Research Browser:

1. **Open the Research Browser window.**
2. **Complete any of the following optional tasks:**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search for content</strong></td>
<td>Choose your search parameters (search all available resources, or search just Lexis Advance, your computer, or the Web) by choosing an option from the Search dropdown list. Then, enter your search terms in the search field and click the Search button (🔍).</td>
</tr>
<tr>
<td><strong>Add the site you are viewing to your Favorites list</strong></td>
<td>Click the Add to Favorites button (ضيف) in your browser window. <strong>Important:</strong> Bookmarks you've created in your other Web browsers will not be available in the Research Browser. Likewise, bookmarks you create while in the Research Browser will not be available in your other browsers.</td>
</tr>
<tr>
<td><strong>View other Web sites you've bookmarked as a favorite</strong></td>
<td>Either click the icon for the site you want to view in the Favorites bar, or click the Manage Favorites and View History button (ضيف) to view a drop-down list of your favorite Web pages. Then, click the link for the site you want to open.</td>
</tr>
<tr>
<td><strong>View a history of sites you've viewed in the Research Browser</strong></td>
<td>Click the Manage Favorites and View History button (ضيف), click the History tab, and then choose the page from the history you want to view. <strong>Important:</strong> Only the research you perform in the Research Browser will be listed in History. Research you perform inside Microsoft Office will not be listed, nor will research you perform in your regular browser window.</td>
</tr>
<tr>
<td><strong>Print a copy of the Web page you are viewing</strong></td>
<td>Click the Print button (🖨). The Print dialog box appears so you can specify your printing options.</td>
</tr>
<tr>
<td><strong>View the Home page, which is Lexis Advance</strong></td>
<td>Click the Home button (🏠). You are taken to Lexis Advance. <strong>Note:</strong> You cannot change the default Home page. It will always be Lexis Advance.</td>
</tr>
<tr>
<td><strong>Open a new tab</strong></td>
<td>On the tab bar, click the right-most tab with the + icon. The new tab is opened. (You can then enter the URL you want to view in the Web address field, perform a new search, or click an existing Favorite to open it.)</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Tip:</td>
<td>To close a tab, click the ❌ icon in the upper-right corner of the tab.</td>
</tr>
</tbody>
</table>
How do I allow Lexis® for Microsoft Office® to document my research?

Lexis® for Microsoft Office® can document each step of your research process. This might be useful if you want to revisit a specific research step. You can share this information with your colleagues or clients. You can also use this information to determine if a Shepard’s Signal™ indicator has changed on a case you are citing in your document. In order to track your research history like this, you must first specify a preference that allows this History Map to be created.

**Note:** This preference is selected by default when Lexis for Microsoft Office is installed.

To do this:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the Preferences button (猬). The LexisNexis® Preferences dialog box appears.
3. Click the History Map link in the left navigation pane.
4. Select Create a History Map for Word documents and Outlook® messages.
5. Click OK to close the LexisNexis® Preferences dialog box and return to your document or email message.
How do I view a map of my research history?

Lexis® for Microsoft Office® tracks and records each step of your research process in the History Map. You can review this map to see your research trail. This might be useful if you want to revisit a specific research step. Additionally, you can share this information with your colleagues or clients, or you can use this information to determine if a Shepard’s Signal™ indicator has changed on a case you are citing in your document.

Note: Before you view your History Map, make sure you have specified the preference for creating the History Map. See How do I allow Lexis® for Microsoft Office® to document my research? for details.

To view the History Map:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the History Map button ( ). The Research Browser window appears, showing the History Map tab.
3. Complete any of the following optional steps:
   - Understand and navigate the contents of the map
   - Edit the contents of the map
   - Save the map as an image file
Marking (Pinning) Research So You Can Save It or Share It with Others

How do I pin items in the Research Pane?

As you use Lexis® for Microsoft Office®, you may find you want to bookmark documents or cases you view so that you can review them later. To do this, you pin the items.

Once you pin an item, you can save the related content to disk, or you can email it to someone. (Recipients of pinned items will need active Lexis Advance® subscriptions to view the content.) You can also include a note with the item. Notes allow you to either comment on why you pinned the item or provide additional information about the case or document. Finally, pinning allows you to keep track of cases so you can more easily identify if the Shepard's Signal™ indicator has changed. Pinned items are associated with the document or email message you are drafting when you pin the research item.

**Note:**
Information about pinned items and notes is stored in a SQL database that gets installed with Lexis for Microsoft Office. Pins are only accessible by those using your Lexis for Microsoft Office ID.

To pin items:

1. From your document or email message, complete your search.
2. While viewing your results in the Research Pane, hover your mouse to the right of the document or case’s title. A pin icon (_pin_ ) appears.
3. Click the pin icon. Images of a pin (_pin_ ) and a note (_note_ ) appear next to the title.
4. Optionally, to add a note to the pinned item, click the Note icon (_note_ ) and enter your text in the pop-up note. (Click the X to save and close the note. To remove a note you’ve created, open the note, clear its contents, and then click the X to save and close your changes.)

Once you have pinned cases and documents, you can view a list of them by clicking the Pinned Items button (_pinned items_ ) on the ribbon. Additionally, the Pinned Items button on the ribbon shows how many items you have pinned.

**Note:**
To unpin an item, click the pinned icon (_pin_ ). The item is no longer pinned and any notes associated with the item will be cleared.

**Caution:**
If you create a copy of the document by using Windows Explorer to copy and paste it, any changes you make to pins in one document will affect pinning in all other copies of the document. To create a new, independent copy of the document, use the File > Save As command in Microsoft Word.
How do I view pinned items?

You can view a list of all the cases and documents you have pinned. As you are viewing this list, you can save the related content to disk, email links to the content to others, or unpin all of the documents.

To view your list of pinned items:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.

2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane. Information about the pinned items appears for each item in the list. This may include the document title, the date it was pinned, and a high-level description of the document's content.

3. Complete any of the following optional steps:
   - Embed the list of pinned items as links in an email message and send it to someone.
   - Save the full text of the pinned items as PDF documents to disk.
   - Clear all pins from the list of items.
How do I save the text of my pinned items to disk?

Once you have pinned research items, you can save these research items to disk. This allows you to review the research you performed at a later date. Each research document will be saved in its own PDF document.

To do this:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane.
3. Click the Save all link. The Browse for Folder dialog box appears.
4. Browse to and select the folder where you want to save the documents.
5. Click OK. The documents are saved to that location.

Note: The download process may take several minutes, depending on the size of each document in your Pinned Items list. During the download process, do not close Microsoft Outlook® or Word, or the download process will be canceled. However, you can continue to work since the download process happens in the background.
How do I share pinned items with others?

Once you have pinned research items, you can share your research with others. You can do this by sending links to the research in an email message.

Recipients of an email that contains embedded links to Lexis Advance® will need a valid ID to access the content.

You can shared pinned items: 1) in an email you are drafting, 2) in an email you are reading, and 3) in a Word document you are drafting.

To include links to pinned items in an email message you are drafting:

1. While in an Outlook® email message, view the LexisNexis® ribbon.

2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane.

3. Click Email this list as links in the current message link. The links are copied to the body of the email message you are drafting.

To include links to pinned items in an email message you are reading:

1. While in an Outlook® email message, view the LexisNexis® ribbon.

2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane.

3. Choose Embed this list as links from the When I reply or forward drop-down list.

4. When you are finished conducting your research, reply to or forward the email message you are reading. The links are copied to the body of the email message.

To include links to pinned items in an email message while drafting a document in Word:

1. While in a Microsoft Word document, view the LexisNexis® ribbon.

2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane.

3. Click the Email links to these items link. An email message is opened and the links are copied to it.
How do I clear all pins from the Pinned Items list?

While viewing the Pinned Items tab of the Research Pane, you can clear all pinned items from the list. Once you do this, all pins associated with the document or email message will be permanently removed. Any notes associated with the pinned items will also be deleted.

To do this:

1. View the LexisNexis® ribbon.

2. In the Show section of the ribbon, click the Pinned Items button ( ). The Pinned Items tab appears in the Research Pane.

3. Click the Un-pin all link. A message appears, confirming that you want to remove all pinned items.

4. Click OK. The list of pinned items is cleared.

Note: You can clear pinned items on an item-by-item basis. To do this, while viewing the individual research items, click the pin associated with it.
Setting Preferences for Using Lexis® for Microsoft Office®

How do I change my default jurisdiction for searching?

You can change the default jurisdiction you use when searching using Lexis® for Microsoft Office®.

To do this:

1. View the LexisNexis® ribbon.

2. Click the Preferences button ( ). The LexisNexis® Preferences dialog box appears.

3. Click the Jurisdiction link in the left navigation pane. The page changes to show the current jurisdiction.

4. Choose the new jurisdiction from the Jurisdiction drop-down list.

5. Click OK to save your changes and return to the document.

Note: You can also change your jurisdiction on a search-by-search basis. While viewing Lexis Advance® content in the Research Pane, click the Jurisdiction drop-down button and choose a different jurisdiction from the list. This will update your current search results only.
How do I allow Lexis® for Microsoft Office® to document my research?

Lexis® for Microsoft Office® can document each step of your research process. This might be useful if you want to revisit a specific research step. You can share this information with your colleagues or clients. You can also use this information to determine if a Shepard’s Signal™ indicator has changed on a case you are citing in your document. In order to track your research history like this, you must first specify a preference that allows this History Map to be created.

**Note:** This preference is selected by default when Lexis for Microsoft Office is installed.

**To do this:**

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis® ribbon.
2. Click the **Preferences** button (琦). The LexisNexis® **Preferences** dialog box appears.
3. Click the **History Map** link in the left navigation pane.
4. Select **Create a History Map for Word documents and Outlook® messages**.
5. Click OK to close the LexisNexis® **Preferences** dialog box and return to your document or email message.
How do I set my search preferences?

When using the Background feature to identify legal terms in your document or email message, you can set a preference for which types of data you want highlighted. For example, if you don’t want to view company names, you can choose not to search for and highlight them.

To choose which items to include in your Background search:

1. While in either a Microsoft Word document or an Outlook® email message, view the LexisNexis ribbon.

2. Click the Preferences button (≡). The LexisNexis® Preferences dialog box appears.

3. Click the Advanced link in the left navigation pane. The view changes to show advanced options.

4. From the list of options under When I click “Background” from the Search Tools box, highlight, select or clear the options you want included or excluded in the Background search.

5. Click OK to save your changes.
How do I set my preferences for citation formats?

When drafting your legal documents, you can identify the default style guide you want your cited references to follow. (Even though you specify a default selection, you can change your selection on a per-document basis, as needed.)

You can also specify whether case names should be italicized or underlined in the document, as well as choose to keep from using "Id." to identify short-form citations.

**Note:**
These settings will be applied to all new documents you create, as well as documents that do not have a specific format assigned. If a document already has a format applied, that format will be used.

To do this:

1. **View the LexisNexis® ribbon.**
2. In the Shepard's® Citation Tools section of the ribbon, click Set Cite Format and choose Format Options from the drop-down list. The LexisNexis® Preferences window appears, showing the options for Citation Format.
3. Make any of the following changes:
   - To specify the default format, choose the option you want from the Default format drop-down list. Options include The Bluebook®, New York style, and California style. This option will be selected by default for documents that do not already have a format applied.
   - Select Underlined or Italicized from Case name in citations should be. This will determine whether case names will be underlined or italicized.
   - To keep Lexis for Microsoft Office from using Id. in short-form citations, select Never use "Id." format in short-form citations.
4. Click OK to save your changes.
How do I change my default Table of Authorities preferences?

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. View the LexisNexis® ribbon.

2. Click the Preferences button. The LexisNexis® Preferences dialog box appears.

3. Click the Table of Authorities link in the left navigation pane. The page changes to show the current settings.

4. Make your selections, based on the following options:
   - To be prompted to specify the Table of Authorities format each time you insert a table in a document, select Display a window each time that asks which format I want to use.
   - To use a default format for your Table of Authorities, select Don't display a window each time; instead use the format below, and then specify which options you want:
     - To control the order authorities are sorted in the document yourself, select General-purpose Table of Authorities, and then specify the sort order.
     - To allow the courts to specify the order authorities are sorted in the document, select Jurisdiction-specific Table of Authorities, and then specify which jurisdiction the document will be filed with.

5. Click OK to save your changes and return to the document.
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