Lexis® for Microsoft®
Office
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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 stop and perform research, either on lexis.com®, the Internet, or on your own local computer. Using Lexis® for Microsoft® Office, you can complete these research tasks without ever having to leave the Microsoft application 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.com 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 out to lexis.com 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".

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 on lexis.com or another 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 pre-defined list of search sites (such as lexis.com, 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 window 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 other 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?

These features were made available in each release of Lexis® for Microsoft® Office:

Lexis® for Microsoft® Office, Release 2

- **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 on 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.com®, Lexis Web®, Google™, and Bing™. You can use these or any services while working in the Research Browser.

Lexis® for Microsoft® Office, Release 1

- **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, individual's 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.com®, 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. You might use any search results you find as precedent in the document you are drafting. Text you identify as precedent 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.com®, and multiple open Web search engines for documents that contain a specific concept or text that you are looking for.
System Requirements

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

Additionally, please note that when working with Microsoft® Word documents, the preferred document format is .DOCX. The .DOC format is not officially supported in Lexis for Microsoft Office; however, many .DOC files will work with the product.
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 tutorials, 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>Category</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Law firm, corporate, and government users</td>
<td>1-888-539-4770</td>
</tr>
<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/lmo/">Link</a></td>
</tr>
</tbody>
</table>

**Microsoft Product Help**

<table>
<thead>
<tr>
<th>Category</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>1-800-936-4900</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://support.microsoft.com">Link</a></td>
</tr>
</tbody>
</table>
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.com® Research Service.

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.com 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, visit http://www.lexis.com, and click theForgot 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.com® 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 the user has a mandatory client ID, then they will be prompted to enter an ID when he or she first clicks on the LexisNexis tab, per session. (A session lasts 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 (Client). The Lexis®: Client dialog box appears.
3. Provide the required information on the form.
4. Click Set 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 contains information that can help you use Lexis for Microsoft Office.

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:

+ - & | ! ( ) { } [ ] ^ " ~ * ? : \n
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>Note: The search feature does not support stemming. A search for the word alert will only return the whole word and not partial matches such as alerts or alerting. To obtain results such as these you must use a wildcard, as shown below.</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>
How do I uninstall Lexis® for Microsoft® Office?

You can remove existing versions of Lexis® for Microsoft® Office from your computer by using the Windows Add/Remove program in the Windows Control Panel. For instructions on using this program, please see the Windows Help and Support Center.
### 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, <em>lexis.com®</em>, 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 <em>lexis.com®</em>, Google™, Bing™, and Lexis® Web as 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 <em>Shepard's Signal™</em> 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 <em>LexisNexis® Preferences</em> dialog box where you can define your personal preferences for working with Lexis for Microsoft Office.</td>
</tr>
<tr>
<td></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>-----------------</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>
Lexis® for Microsoft® Word Ribbon

**Note:** Please note that when working with Microsoft® Word documents, the preferred document format is .DOCX. The .DOC format is not officially supported in Lexis for Microsoft Office; however, many .DOC files will work with the product.

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><strong>Background</strong></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 research sources, such as Lexis® Web, lexis.com®, 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 document 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>Shepard's &amp; Citations</strong></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><strong>Pull Citations</strong></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><strong>Cases</strong></td>
<td>Searches Lexis® for cases that contain your selected terms.</td>
</tr>
<tr>
<td><strong>Briefs, Motions, &amp; Pleadings</strong></td>
<td>Searches Lexis® for briefs, motions, and pleadings that contain your selected terms.</td>
</tr>
<tr>
<td><strong>Clauses &amp; Contracts</strong></td>
<td>Searches for clauses and contracts that contain your selected terms. Contracts can provide alternative language for documents you are drafting.</td>
</tr>
<tr>
<td><strong>Searches for model forms that contain your selected terms. Forms can help you draft your own transactional documents.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Samples &amp; Forms</strong></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>---------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Import</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 <em>lexis.com</em>,Google™, Bing™, and Lexis® Web as search engines for your research.</td>
</tr>
<tr>
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<tr>
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</tr>
<tr>
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<td>Shows or hides the Research Pane.</td>
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<tr>
<td><strong>Pane</strong></td>
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<tr>
<td><strong>Preferences</strong></td>
<td>Lets you change the client ID for the research you are performing.</td>
</tr>
<tr>
<td><strong>Client</strong></td>
<td>Opens the <em>Lexis for Microsoft Office</em> 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>
Frequently Asked Questions

Overview

What is Lexis® for Microsoft® Office?

Searching

What content am I searching when using Lexis for Microsoft Office? Can I specify what lexis.com sources are searched?

Will Lexis for Microsoft Office also search my Microsoft Outlook email? Can I select other locations on my computer to be searched?

Is there a way to search a specific jurisdiction or will Lexis for Microsoft Office just search all jurisdictions?

How does searching in general work in Lexis for Microsoft Office? Can I use a Boolean search or terms and connectors?

In what order are results delivered in Lexis for Microsoft Office?

What will the Background feature recognize? Why does Lexis for Microsoft Office highlight some names and not others when using it?

Shepard's & Citations

When using the Shepard's & Citations button, why are some cases in my document highlighted with Shepard's Signal™ Indicators, while others have a Shepardize button?

Sometimes a citation looks like it's good, but no Shepard's signal appears for it. Why does this happen?

What if a citation in my document is incorrect or isn't in a recognized citation format, such as Bluebook? Will Lexis for Microsoft Office recognize it?

What happens to my links when I save the document?

Can you print/download/email a cite list?

Briefs, Motions, & Pleadings

How does narrowing by jurisdiction work when viewing a list of briefs?

Pinning Research

Can you explain "pinning" in more depth? How are pinned items saved?

Can I send documents with pinned items to others?

What do I do if I do not see the option to pin my items?

Technical Questions and Issues

Does Lexis for Microsoft Office work in the Citrix Environment?

Is Lexis for Microsoft Office a "plug in?"

Is Lexis for Microsoft Office compatible with Microsoft Windows® Vista?
Does Lexis for Microsoft Office work in the Outlook application for Blackberry® devices?

Does Lexis for Microsoft Office conflict with other software?

Does Lexis for Microsoft Office work with my Microsoft Office 2003 documents (which are in .DOC format)?

Miscellaneous

Is there some way to view research in a larger window, perhaps on a second monitor?

Can I have multiple Word documents open while I'm using Lexis for Microsoft Office? I'd like to drag research results from one document to another.

What happens when I close and save my document? Are the pins and the contents in the Research History Map saved?

How does Lexis for Microsoft Office work with Word's Change Tracking feature?

Does Lexis for Microsoft Office recognize citations in the document's endnotes?

Overview

What is Lexis® for Microsoft® Office?

Lexis for Microsoft Office is a workflow tool that provides direct access from Microsoft® Word and Outlook to research content from lexis.com®, Lexis® Web, Bing™, Google™, and your computer and document management system, revolutionizing the way content is surfaced and delivered to you. It is a first-of-its-kind solution that integrates sources of valuable legal content directly within the trusted Microsoft Office desktop applications you use every day.

Lexis for Microsoft Office appears as a LexisNexis® tab in the Microsoft Word or Outlook ribbon. It enables automatic identification of text in the document, which is linked back to Shepard's® citations, documents, Web results, news, and your own files.

See What is Lexis® for Microsoft® Office? for more details.

[ Top ]

Searching

What content am I searching when using Lexis for Microsoft Office? Can I specify what lexis.com sources are searched?

Specific search sources were carefully selected for Lexis for Microsoft Office. To narrow your search results, you can select a Jurisdiction while viewing the results.

In addition to using Lexis for Microsoft Office to access information on lexis.com, you can get direct access to other sources from Lexis Web, Google, Bing, company or customer databases stored in your document management system, as well as information from your own computer.

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Will Lexis for Microsoft Office also search my Microsoft Outlook email? Can I select other locations on my computer to be searched?

The Search My Computer feature in Lexis for Microsoft Office uses the functionality available in the Windows Desktop Search to search any drive or folder that your computer is mapped to.
Here’s how to see what’s being searched and make changes:

1. Click the Start button.

2. Enter search in the Search field. A list of options appears.

3. In the Control Panel group, select Indexing Options. The Indexing Options dialog box appears and lists all of the different locations you are currently searching.

4. Click Modify to change or add new folders, drives, or file types.

Is there a way to search a specific jurisdiction or will Lexis for Microsoft Office just search all jurisdictions?

Yes, you can specify a jurisdiction using the Jurisdiction drop-down list. (This list appears above your search results.) You can also specify a default preference.

How does searching in general work in Lexis for Microsoft Office? Can I use a Boolean search or terms and connectors?

Starting with the release of Lexis for Microsoft Office Release 2, searches are performed using Easy Search™, which supports both natural language and Terms and Connectors.

In what order are results delivered in Lexis for Microsoft Office?

Results are sorted by relevance, just as on lexis.com.

What will the Background feature recognize? Why does Lexis for Microsoft Office highlight some names and not others when using it?

The Background feature recognizes companies, organizations, judges, attorneys, law firms, and legal terms of art. To be recognized:

- Companies must be listed in the Directory of Corporate Affiliates and have annual revenue greater than $1 million
- Names must be registered on Martindale-Hubbell
- Legal terms of art must be included in abridged versions of Ballentine’s Law Dictionary

Shepard’s & Citations

When using the Shepard’s & Citations button, why are some cases in my document highlighted with Shepard’s Signal™ Indicators, while others have a Shepardize button?

Cases that are clearly recognized as existing in Shepard’s on lexis.com will be highlighted with a link and the appropriate Shepard’s signal. If a citation is recognized, but there is no exact match on Shepard’s on lexis.com (because of formatting or typos, for example), the Shepardize button will appear 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 on lexis.com to identify the correct Shepard's report for your citation.

[ Top ]

Sometimes a citation looks like it's good, but no Shepard's signal appears for it. Why does this happen?

Citations do not always have Shepard's signals. Signals in Shepard's 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 may be new and not yet cited by another court. In these instances, the case exists but no subsequent Shepard's treatment exists to include with it.

[ Top ]

What if a citation in my document is incorrect or isn't in a recognized citation format, such as Bluebook? Will Lexis for Microsoft Office recognize it?

Yes. Lexis for Microsoft Office leverages many years of citation recognition expertise and technology and can recognize citation variations; therefore, a cite does not have to be in Bluebook format.

[ Top ]

What happens to my links when I save the document?

Because Shepard's signals can change at any time based on new law being decided, Shepard's links and signals are not retained when you save the document. You must rerun Shepard's to generate them each time you open your document.

[ Top ]

Can you print/download/email a cite list?

Yes, you can print, download, and email your cite lists.

[ Top ]

Briefs, Motions & Pleadings

How does narrowing by jurisdiction work when viewing a list of briefs?

When searching for briefs, the search focuses on the jurisdiction chosen. If there are no briefs available for the jurisdiction indicated, the search will default to a broader search of other jurisdictions. Some smaller jurisdictions may have more limited coverage.

[ Top ]

Pinning Research

Can you explain "pinning" in more depth? How are pinned items saved?

When you install Lexis for Microsoft Office, a SQL database is installed on your computer. Information about pinned items are stored in this database, and are only accessible when using your Lexis for Microsoft Office ID.

See Marking (Pinning) Research So You Can Save It or Share It with Others for more details.
Can I send documents with pinned items to others?

If you send an email message or Word document to someone else, information about the pinned items will not be included in it. If you want to share pinned items with others, you must explicitly instruct Lexis for Microsoft Office to include links to your pinned research in a separate email message.

What do I do if I do not see the option to pin my items?

Most likely, Lexis for Microsoft Office is either not enabled or is not installed for Microsoft Outlook.

First, check to see if the LexisNexis tab in the Outlook ribbon is simply disabled. See Enabling The LexisNexis Tab in Microsoft Outlook.

If Lexis for Microsoft Office does not appear in your list of disabled items in Outlook, then you must install it. To install, follow these instructions:

1. Open your Control Panel. (See the Windows Help for instructions on doing this.)
2. Go to Add/Remove Programs.
3. Uninstall Lexis for Microsoft Office.
5. During the installation process, be sure to select the check boxes for both Outlook and Word.

Technical Questions and Issues

Does Lexis for Microsoft Office work in the Citrix Environment?

Lexis for Microsoft Office may work as long Microsoft Office 2007 or 2010 is installed, but LexisNexis cannot guarantee that Lexis for Microsoft Office will work in all Citrix environments. Installation of Lexis for Microsoft Office in a Citrix environment may require custom installation services and additional installation charges.

See System Requirements for a full list of System Requirements.

Is Lexis for Microsoft Office a "plug in?"

Lexis for Microsoft Office is an integrated Office Business Application (OBA) developed by Microsoft. As such, it is a seamless part of Microsoft Word and Outlook. By working jointly with Microsoft, LexisNexis co-developed an integrated application that minimizes the typical interoperability issues faced by third party plug-ins. As an OBA, Lexis for Microsoft Office will benefit from Microsoft support, upgrades, and enhancement of the Office Application suite.

Is Lexis for Microsoft Office compatible with Microsoft Windows® Vista?
As long as you have Microsoft Office 2007 or 2010, you can use Lexis for Microsoft Office on most later Windows operating systems, including Windows Vista.

See System Requirements for a full list of System Requirements.

Does Lexis for Microsoft Office work in the Outlook application for Blackberry® devices?

Lexis for Microsoft Office does not work with Blackberry devices.

Does Lexis for Microsoft Office conflict with other software?

LexisNexis partnered with Microsoft to create Lexis for Microsoft Office, which adds the LexisNexis tab into Microsoft Outlook and Microsoft Word. Lexis for Microsoft Office is an Office Business Application (OBA) that is fully integrated and backed by both LexisNexis and Microsoft.

When Microsoft releases updates to Microsoft Word or Microsoft Outlook, Lexis for Microsoft Office is tested and approved at release. LexisNexis participates actively and works directly with Microsoft to resolve customer issues.

Does Lexis for Microsoft Office work with my Microsoft Office 2003 documents (which are in .DOC format)?

Because Lexis for Microsoft Office is designed for Microsoft Office 2007 and 2010, we recommend that you convert all .DOC files to .DOCX format for optimal performance.

Miscellaneous Questions

Is there some way to view research in a larger window, perhaps on a second monitor?

Lexis for Microsoft Office includes a Research Browser that lets you "pop out" a separate window for viewing your research. This Research Browser shows your search results in a larger window, which can be viewed on a second monitor to maximize viewing. To view the Research Browser, simply click the Research Browser button ( ). If you want, drag the resulting window to your second screen.

The Research Browser also offers more immediate and seamless access to lexis.com and your full Lexis subscription for completing deeper, more targeted research. You no longer have to access lexis.com using a separate browser.

Can I have multiple Word documents open while I'm using Lexis for Microsoft Office? I'd like to drag research results from one document to another.

Yes.
What happens when I close and save my document? Are the pins and the contents in the Research History Map saved?

Yes. Pinned items and the Research History Map are saved.

[ Top ]

How does Lexis for Microsoft Office work with Word's Change Tracking feature?

We recommend that you turn off Track Changes before using the tools available in Lexis for Microsoft Office.

[ Top ]

Does Lexis for Microsoft Office recognize citations in the document's endnotes?

Lexis for Microsoft Office does not recognize citations in the endnotes, but it does recognize citations in footnotes.

Take the following steps to convert your endnotes to footnotes:

1. In your Word document, click the References tab.
2. Click the Expand icon in the bottom-right corner of the Footnotes section to expand the Footnote and Endnote dialog box.
3. Footnotes to open the Footnote and Endnote dialog box.
4. Click Convert, and then select Convert all endnotes to footnotes.
5. Click OK and then Close. Any endnotes in the document are converted to footnotes.

[ Top ]
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 individuals 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: Definition by Lexis®, About, Cases, News, Citations, Martindale-Hubbell, Lexis® Firstlook (which includes Cases, Statutes, and Analytical) and Web (which includes Lexis®, Bing™, and Google™).

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.

   Note: The highlighted search term will be submitted as an Easy Search™ search.

4. 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 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 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 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. In the "Background" feature section of the page, 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.com® 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: Lexis® Firstlook results (which includes Cases, Statues, and Analytical) and Web results (which includes Lexis®, 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 ( ). The search terms are submitted and your results are displayed in the Research Pane.
   
   **Note:**
   The highlighted search term will be submitted as an Easy Search™ search.

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 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 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 on lexis.com®?

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.com®. Any results that are found appear in the Research Pane. Any terms you submit are searched as Easy Search™ terms.

To research a topic using lexis.com:

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, Statutes, or Analytical, depending on which type of documents you want to view.
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.</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 by entering additional search terms</td>
<td>Enter your terms in the FOCUS™ Terms box and click Go. Click the Exit FOCUS™ link to return to your original search results.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous (◀️) or Next (▶️).</td>
</tr>
<tr>
<td>To print, save, or email your list of search results</td>
<td>Click the appropriate delivery icon. A new tab appears where you can select your delivery options to complete the process:</td>
</tr>
<tr>
<td>■</td>
<td>Click to print the page or document. (Click to preview the printed document.)</td>
</tr>
<tr>
<td>■</td>
<td>Click to save the document to disk.</td>
</tr>
<tr>
<td>■</td>
<td>Click to email the document.</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 convert a PDF document into Word format?

You can import a PDF document into Microsoft Word. This might be useful if the PDF document contains text you want to include in the document or email you are drafting. To do this, you can import the PDF document using a ribbon button in either Word or Outlook, or you can import the PDF document using a file shortcut option.

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 documents you want to convert and click OK. The PDF document is converted and opened in Microsoft Word.

To import the PDF document using a file shortcut option:

1. Locate the PDF document you want to convert. This might be an attachment in an email, or it might be a file already saved to disk.
2. Right-click on the PDF file icon. A shortcut menu appears.
3. Choose Convert to Microsoft Word from the shortcut menu.
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.com®, Lexis® Web, Google™, and Bing™. Within this window, you can perform many of the same tasks as you would in your regular Web browser window, such as:

- Adding sites to your Favorites bar
- Viewing a history of research you have performed in the Research Browser
- Simultaneously viewing multiple pages of information using the different tabs available
- Using 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.com®, 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 (🔍).</td>
</tr>
<tr>
<td>Add the site you are viewing to your Favorites list</td>
<td>Click the Add to Favorites button ( сохранить) in your browser window.</td>
</tr>
<tr>
<td></td>
<td><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>View other Web sites you've bookmarked as a favorite</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 (🌟) 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>View a history of sites you've viewed in the Research Browser</td>
<td>Click the Manage Favorites and View History button (🌟), click the History tab, and then choose the page from the history you want to view.</td>
</tr>
<tr>
<td></td>
<td><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>Print a copy of the Web page you are viewing</td>
<td>Click the Print button (📄). The Print dialog box appears so you can specify your printing options.</td>
</tr>
<tr>
<td>View the Home page, which is lexis.com</td>
<td>Click the Home button (🏠). You are taken to lexis.com.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You cannot change the default Home page. It will always be lexis.com.</td>
</tr>
<tr>
<td>Open a new tab</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 label.</td>
</tr>
</tbody>
</table>
How do I change my default jurisdiction for searching?

When you first install Lexis® for Microsoft® Office, the installation program asks you to specify a default jurisdiction for your research activities. However, you can change the default jurisdiction at any time as you use Lexis for Microsoft Office.

To change your default jurisdiction:

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.com® content in the Research Pane, click the Jurisdiction drop-down button and choose a different jurisdiction from the list. This will update only your current search results.
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, the citation will be changed to a hyperlink so you can click it and view the related case in the Research Pane. Additionally, Shepard's Signal™ Indicators will be added to the citation to help you know the citation's status.

Additionally, if a citation is recognized, but there is no exact match on Shepard's in lexis.com (for example, because of formatting or a misspelling), the Shepardize® button 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 on lexis.com so you can identify the correct Shepard's report for your citation.

Caution: The Shepard's & Citations 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 Validation section of the ribbon, click the Shepard's & Citations button ( Shepardize ). 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 the case you are citing</td>
<td>Click the hyperlink. The Research Pane is opened on the right-hand 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 signal indicator next to the hyperlink. The following signals can help you determine the current standing of a case:</td>
</tr>
<tr>
<td></td>
<td>![Warning](Shepard's &amp; Citations) Negative treatment indicated</td>
</tr>
<tr>
<td></td>
<td>![Question](Shepard's &amp; Citations) Validity questioned by citing references</td>
</tr>
<tr>
<td></td>
<td>![Caution](Shepard's &amp; Citations) Possible negative treatment</td>
</tr>
<tr>
<td></td>
<td>![Positive treatment](Shepard's &amp; Citations) is indicated</td>
</tr>
<tr>
<td></td>
<td>![Citing references with analysis are available](Shepard's &amp; Citations)</td>
</tr>
<tr>
<td></td>
<td>![Citation information is available](Shepard's &amp; Citations)</td>
</tr>
<tr>
<td>To change citations back to standard (non-</td>
<td>Click the Shepard's &amp; Citations button ( Shepardize ) again.</td>
</tr>
<tr>
<td>hyperlinked) text</td>
<td></td>
</tr>
</tbody>
</table>
Note:

- When you save and close the document, links to Shepard's citations and signals will be removed. You must click the Shepard's & Citations button again to generate the links. Because Shepard's signals can change at any time based on new law being decided, it is best to always run these again when opening your document.

- Citations do not always have Shepard's signals. Signals in Shepard's 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.
How do I view a list of all citations in my Microsoft® Word document?

You can view a list of all of 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”.

Additionally, if a citation is recognized, but there is no exact match on Shepard’s in lexis.com (for example, because of formatting or a misspelling), the Shepardize® button 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 on lexis.com so you can identify the correct Shepard’s report for your citation.

Caution: The Pull Citations feature may not work in Word documents larger than 10 MB.

To pull 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 Validation section of the ribbon, click the Pull Citations button ( ). 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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To filter the list to show only cases that have a specific type of analysis (for example, Positive, Caution, etc.)</td>
<td>Choose the analysis from the Navigate drop-down list.</td>
</tr>
<tr>
<td>To move between cases or pages of results in the list</td>
<td>Click the Next button ( ) or the Previous button ( ).</td>
</tr>
<tr>
<td>Tip:</td>
<td>Depending on which case you are viewing in the Research Pane, the corresponding citation in the document is highlighted.</td>
</tr>
<tr>
<td>To change how much of the case detail you are viewing</td>
<td>Choose an option from the Show drop-down list:</td>
</tr>
<tr>
<td></td>
<td>▪ Cite by Cite shows the full text of the cited case.</td>
</tr>
<tr>
<td></td>
<td>▪ Citations List shows just a list of the citation numbers. You can click a citation number to view the full case document.</td>
</tr>
<tr>
<td></td>
<td>▪ Citations with Context shows a list of citations, followed by the text of the case that relates to your research.</td>
</tr>
<tr>
<td>To pin a specific citation ( ) so you can refer back to it or share it with others</td>
<td>Rest your mouse pointer to the right of the case name link and click the pin that appears.</td>
</tr>
<tr>
<td>Note:</td>
<td>This option is available in only Cite by Cite and Citations with Context views. It is not available when viewing citations in Citations List mode.</td>
</tr>
</tbody>
</table>
Note:

- When you save and close the document, links to *Shepard's* citations and signals will be removed. You must click the **Pull Citations** button (​) again to generate the links. Because *Shepard's* signals can change at any time based on new law being decided, it is best to always run these again when opening your document.

- Citations do not always have *Shepard's* signals. Signals in *Shepard's* 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.
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. You can work with these results as you would if you were viewing them on lexis.com®.

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 (_CUSTOMER-ADDED-ICON). Cases related to your search phrase appear in the Research Pane.

   **Note:**
   The highlighted search term will be submitted as an Easy Search™ search.

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.</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><strong>Tip:</strong> 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 (CUSTOMER-ADDED-ICON).</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 (CUSTOMER-ADDED-ICON). Click this pin to bookmark the research.</td>
</tr>
<tr>
<td>To filter your search results by entering additional search terms</td>
<td>Enter your terms in the FOCUS™ Terms box and click Go.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Click Exit FOCUS™ to return to your original search results.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous (CUSTOMER-ADDED-ICON) or Next (CUSTOMER-ADDED-ICON).</td>
</tr>
<tr>
<td>To show (highlight) where your search terms are used in the associated document</td>
<td>Click Show Hits. The view is updated to show your search keywords in the context in which they are used.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Click Hide Hits to stop highlighting your search terms.</td>
</tr>
<tr>
<td>To print, save, or email your list of search results</td>
<td>Click the appropriate delivery icon:</td>
</tr>
<tr>
<td></td>
<td>▪ Click (CUSTOMER-ADDED-ICON) to print the page or document. (Click (CUSTOMER-ADDED-ICON) to preview the printed document.)</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>- Click <img src="image" alt="disk icon" /> to save the document to disk.</td>
</tr>
<tr>
<td></td>
<td>- Click <img src="image" alt="email icon" /> to email the document.</td>
</tr>
<tr>
<td></td>
<td>A new tab appears where you can select your delivery options to complete the process.</td>
</tr>
</tbody>
</table>

**Note:**

If your search results include text you want to add to your document, you can either highlight the text in your search results and then drag it to the place in the document you want to insert it, or you can copy the text and paste it in your document.
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®/or 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 on lexis.com®.

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.
   
   Note: The highlighted search term will be submitted as an Easy Search™ search.

4. Choose which type of document you want to view. Specifically, at the top of the Research Pane, click either the Briefs & Motions button or the Pleadings button.
5. Review the list of documents, 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 document</td>
<td>Click the hyperlink associated with the document name.</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>Note:</td>
<td>If there are no briefs available for the jurisdiction indicated, the search will default to a broader search of other jurisdictions. Some of the smaller jurisdictions may have more limited coverage.</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 by entering additional search terms</td>
<td>Enter your terms in the FOCUS™ Terms box and click Go.</td>
</tr>
<tr>
<td>Note:</td>
<td>Click Exit FOCUS™ to return to your original search results.</td>
</tr>
<tr>
<td>To move through the different pages of results</td>
<td>Click either Previous ( ) or Next ( ).</td>
</tr>
<tr>
<td>To show (highlight) where your search terms are used in the associated research</td>
<td>Click Show Hits. The view is updated to show your search keywords in the context in which they are used.</td>
</tr>
<tr>
<td>Note:</td>
<td>To stop highlighting search terms, click Hide Hits.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| To print, save, or email your list of search results | Click the appropriate delivery icon:  
- Click to print the page or document. (Click to preview the printed document.)  
- Click to save the document to disk.  
- Click to email the document.  
A new tab appears where you can select your delivery options to complete the process. |

**Note:** If your search results include text you want to add to your document, you can either highlight the text in your search results and then drag it to the place in the document you want to insert it, or you can copy the text and paste it in your document.
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 this text ("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.
   
   Note: The highlighted search term will be submitted as an Easy Search™ search.

3. In the Find Precedent section of the ribbon, click the Clauses & Contracts button ( ). By default, the Clauses & Contracts Search Criteria dialog box appears.
4. Specify your search criteria by choosing the options you want to search with.
   
   Note: To always use this search criteria, make your selections and then select From now on, skip this step and use these selections as my default choices.

5. Click OK. Documents related to your search appear in the Research Pane.
6. Click one of these tabs—Lexis®, Lexis® Web, Bing™, or Google™—to show only documents found using that search engine.
7. 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.</td>
</tr>
<tr>
<td>(Lexis® tab only) To filter your search results</td>
<td>Either enter your terms in the FOCUS™ Terms box and click Go, or choose your options from the Narrow By drop-down list. (See How do I filter my search results while searching for clauses, contracts, samples, and forms? for instructions.)</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>
<tr>
<td>To navigate between pages in each individual search engine</td>
<td>Use the navigation buttons:</td>
</tr>
<tr>
<td></td>
<td>▪ Click ▼ to move to the previous page you viewed in the Research Pane</td>
</tr>
<tr>
<td></td>
<td>▪ Click ▶ to move to the next page you viewed in the Research Pane</td>
</tr>
<tr>
<td></td>
<td>▪ Click ◁ to refresh the page you are viewing</td>
</tr>
<tr>
<td></td>
<td>▪ Click ✗ to stop the page from loading</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>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>(Lexis® tab only) To view the original filing in the EDGAR Online database</td>
<td>View a search result and click the <strong>Link back to original filing</strong> link.</td>
</tr>
<tr>
<td>(Lexis® tab only) To go to a specific section or clause of a contract you are viewing</td>
<td>Click the link for the contract you want to view, and then choose the clause from the <strong>Jump to a clause</strong> drop-down list. You are taken to that specific clause in the document.</td>
</tr>
</tbody>
</table>

**Note:**
If your search results include text you want to add to your document, you can either highlight the text in your search results and then drag it to the place in the document you want to insert it, or you can copy the text and paste it in your document.
How do I set my preferences for finding clauses and contracts?

You can specify your preferences for how Lexis® for Microsoft® Office searches for clauses and contracts. For example, you can select an option that will prompt you for your search criteria each time you submit a search, or you can specify the criteria you always want to use.

To specify your preferences for searching for clauses and contracts:

1. While in a Microsoft Word document, 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 page changes to show advanced search options.

4. Scroll through the list of options until you see the Clauses & Contracts section.

5. Select one of the following options for When I click "Clauses & Contracts" from the Find Precedent Box:
   - Display a window each time that asks me for my search criteria lets you choose your search criteria (including area of law and type of agreement) each time you search for clauses or contracts.
   - Don't display a window each time; always use the criteria below lets you set your default search criteria for all search requests. Once you select this option, choose the search criteria you want from the Area of Law/Document Category, Type of Agreement, and Governing Law lists.

   **Tip:**
   To select multiple consecutive and non-consecutive options from these lists, press either SHIFT or CTRL, respectively, as you click on the items you want.

6. Click OK to save your changes and return to the document.
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 this text (“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.

   Note: The highlighted search term will be submitted as an Easy Search™ search.

3. In the Find Precedent section of the ribbon, click the Samples & Forms button ( ). By default, the Samples & Forms Search Criteria dialog box appears.

4. Specify your search criteria by choosing the options you want to search with.

   Note: To always use this search criteria, make your selections and then select From now on, skip this step and use these selections as my default choices.

5. Click OK. Documents related to your search appear in the Research Pane.

6. Click one of these tabs—Lexis®, Lexis® Web, Bing™, or Google™—to show only documents found using that search engine.

7. Complete any of the following optional steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Lexis® tab only) To filter your search results</td>
<td>Either enter your terms in the FOCUS™ Terms box and click Go, or choose your options from the Narrow By drop-down list. (See How do I filter my search results while searching for clauses, contracts, samples, and forms? for instructions.)</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 ( ). |
| To pin a specific item of research so you can refer | Rest your mouse pointer to the right of the research title. A pin icon appears ( ). Click this pin to bookmark the research. |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>back to it or share it with others</td>
<td>(Lexis® tab only) To go to a specific section or clause of a form you are viewing Click the link for the form you want to view, and then choose the clause from the Jump to a clause drop-down list. You are taken to that specific clause in the document.</td>
</tr>
<tr>
<td>(Lexis® tab only) To view the original source document</td>
<td>(Lexis® tab only) To view the original source document Click the link for the form you want to view, and then scroll to the bottom of the form. Click the link for the Original Source. The source document appears in a new tab in the Research Pane.</td>
</tr>
</tbody>
</table>

**Note:**
If your search results include text you want to add to your document, you can either highlight the text in your search results and then drag it to the place in the document you want to insert it, or you can copy the text and paste it in your document.
How do I set my preferences for finding samples and forms?

You can specify your preferences for how Lexis® for Microsoft® Office searches for samples and forms. For example, you can select an option that will prompt you for your search criteria each time you submit a search, or you can specify the criteria you always want to use.

To specify your preferences for searching for samples and forms:

1. While in a Microsoft Word document, 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 page changes to show advanced search options.

4. Scroll through the list of options until you see the Samples & Forms section.

5. Select one of the following options for When I click "Samples & Forms" from the Find Precedent Box:
   - Display a window each time that asks me for my search criteria lets you choose your search criteria (including area of law and type of form) each time you search for samples or forms.
   - Don't display a window each time; always use the criteria below lets you set your default search criteria for all search requests. Once you select this option, choose the search criteria you want from the Area of Law, Type of Sample/Form, and Governing Law lists.

   **Tip:**
   To select multiple options from these lists, press either CTRL or SHIFT as you click on the items you want.

6. Click OK to save your changes and return to the document.
How do I filter my search results while searching for clauses, contracts, samples, and forms?

Using Lexis® for Microsoft® Office, you can search for clauses, contracts, sample documents, and forms to assist you as you are drafting your documents or email messages. As you are viewing your search results, you can filter those results to show you more specific documents. You can use either FOCUS™ Terms or options in the Narrow By drop-down list.

To filter your search results:

1. Complete your search for clauses and contracts or samples and forms.

2. View the Lexis® tab of the Research Pane.

3. Complete one of the following steps to apply a filter:
   - Enter a specific term on which you want to filter in the FOCUS™ Terms box and click Go. (To clear your FOCUS™ filter, click Exit FOCUS™.)
   - Choose an option from the Narrow By drop-down list. (To clear your filters, click Clear All at the top of the drop-down list.)

Your search results are updated, based on the filters you have applied.
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" /></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 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.</td>
</tr>
<tr>
<td>Expand / collapse your</td>
<td><img src="image" alt="Expand/Collapse" /></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 <strong>Collapse</strong> 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 <strong>Expand</strong> icon (▲).</td>
</tr>
<tr>
<td>research nodes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shepard's Signal™ Indicators</td>
<td><img src="image" alt="Shepard's Signal" /></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" /></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" /></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>with others or keep as a record of your research.</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 (谤). 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 (谤). 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.com®, Lexis® Web, Google™, and Bing™. Within this window, you can perform many of the same tasks as you would in your regular Web browser window, such as:

- Adding sites to your Favorites bar
- Viewing a history of research you have performed in the Research Browser
- Simultaneously viewing multiple pages of information using the different tabs available
- Using 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.com®️, 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>
</tbody>
</table>
| Add the site you are viewing to your Favorites list | Click the Add to Favorites button (ضيف) 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 (ضيف) 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 (ضيف), 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 (🖨️). The Print dialog box appears so you can specify your printing options. |
| View the Home page, which is lexis.com | Click the Home button (🏠). You are taken to lexis.com.  
**Note:** You cannot change the default Home page. It will always be lexis.com. |
<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>Tip:</td>
<td>To close a tab, click the ❌ icon in the upper-right corner of the tab label.</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 ( ). 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. 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 changes. Pinned items are associated with the document or email message you are drafting when you pin the research item.

Note: Pinned items and notes are stored in a SQL database that gets installed with Lexis for Microsoft Office. They are only accessible by those using your Lexis for Microsoft Office ID. If you send the email message or Word document to someone else, the pinned information will not be included.

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 ( ▪️) appears.
3. Click the pin icon. Images of a pin ( ▪️) and a note ( 📝) appear next to the title.
4. Optionally, to add a note to the pinned item, click the Note icon ( 📝) 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 ( ▪️) on the ribbon. Additionally, the Pinned Items button in the ribbon shows how many items you have pinned.

When you close Microsoft® Word, you can save (or discard) your pinned items. If you choose to discard pinned items, all pinned items associated with the current document will be deleted—not just the items pinned during the current session. If you choose to save your pinned items, they will be available the next time you edit the document or email message.

Note: To unpin an item, click the pinned icon ( ▪️). 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. Additionally, 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.com® 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.

4. Click Go. 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 Embed 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?

When you first install Lexis® for Microsoft® Office, the installation program asks you to specify a default jurisdiction for your research activities. However, you can change the default jurisdiction at any time as you use Lexis for Microsoft Office.

To change your default jurisdiction:

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.com® content in the Research Pane, click the Jurisdiction drop-down button and choose a different jurisdiction from the list. This will update only your current search results.
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 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. In the "Background" feature section of the page, 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 finding clauses and contracts?

You can specify your preferences for how Lexis® for Microsoft® Office searches for clauses and contracts. For example, you can select an option that will prompt you for your search criteria each time you submit a search, or you can specify the criteria you always want to use.

To specify your preferences for searching for clauses and contracts:

1. While in a Microsoft Word document, 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 page changes to show advanced search options.

4. Scroll through the list of options until you see the Clauses & Contracts section.

5. Select one of the following options for When I click "Clauses & Contracts" from the Find Precedent Box:
   - Display a window each time that asks me for my search criteria lets you choose your search criteria (including area of law and type of agreement) each time you search for clauses or contracts.
   - Don't display a window each time; always use the criteria below lets you set your default search criteria for all search requests. Once you select this option, choose the search criteria you want from the Area of Law/Document Category, Type of Agreement, and Governing Law lists.

   Tip: To select multiple consecutive and non-consecutive options from these lists, press either SHIFT or CTRL, respectively, as you click on the items you want.

6. Click OK to save your changes and return to the document.
How do I set my preferences for finding samples and forms?

You can specify your preferences for how Lexis® for Microsoft® Office searches for samples and forms. For example, you can select an option that will prompt you for your search criteria each time you submit a search, or you can specify the criteria you always want to use.

To specify your preferences for searching for samples and forms:

1. While in a Microsoft Word document, 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 page changes to show advanced search options.

4. Scroll through the list of options until you see the Samples & Forms section.

5. Select one of the following options for When I click "Samples & Forms" from the Find Precedent Box:
   - **Display a window each time that asks me for my search criteria** lets you choose your search criteria (including area of law and type of form) each time you search for samples or forms.
   - **Don't display a window each time; always use the criteria below** lets you set your default search criteria for all search requests. Once you select this option, choose the search criteria you want from the Area of Law, Type of Sample/Form, and Governing Law lists.

   **Tip:**
   To select multiple options from these lists, press either CTRL or SHIFT as you click on the items you want.

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