How-To Guide

The Lexis® *for* Microsoft® Office How-To Guide provides a step-by-step guide to using some of the functionality available in Lexis *for* Microsoft Office. It is designed to help users better understand the options within the tools and includes examples of situations users are likely to encounter when using the product.

If questions remain, contact your local LexisNexis® representative or Customer Support: **888.539.4770**.

The specific set of Lexis *for* Microsoft Office buttons available to each customer is dependent on the type of contract signed. Please contact LexisNexis Customer Support for more details: 888.539.4770.

LexisNexis®

Check Cite Format is the foundation for citation editing/formatting and the creation of a Table of Authorities. Check Cite Format recognizes citations in your document and suggests changes to ensure citation formats conform to your selected style manual. A Table of Authorities can only be created after all citation formats have been reviewed.

When using the Check Cite Format and Insert TOA tools in Lexis *for* Microsoft Office, users are presented with a variety of decisions during the citation formatting and Table of Authorities creation process. Using the tools and options correctly will ensure citations are formatted according to users' requirements and appear in the Table of Authorities as desired.

Check Cite Format: Confirming Correctly Formatted Citations

1.
If a citation is in the correct format (based on the style manual chosen), you will receive the message **Correct format** in the bottom box.
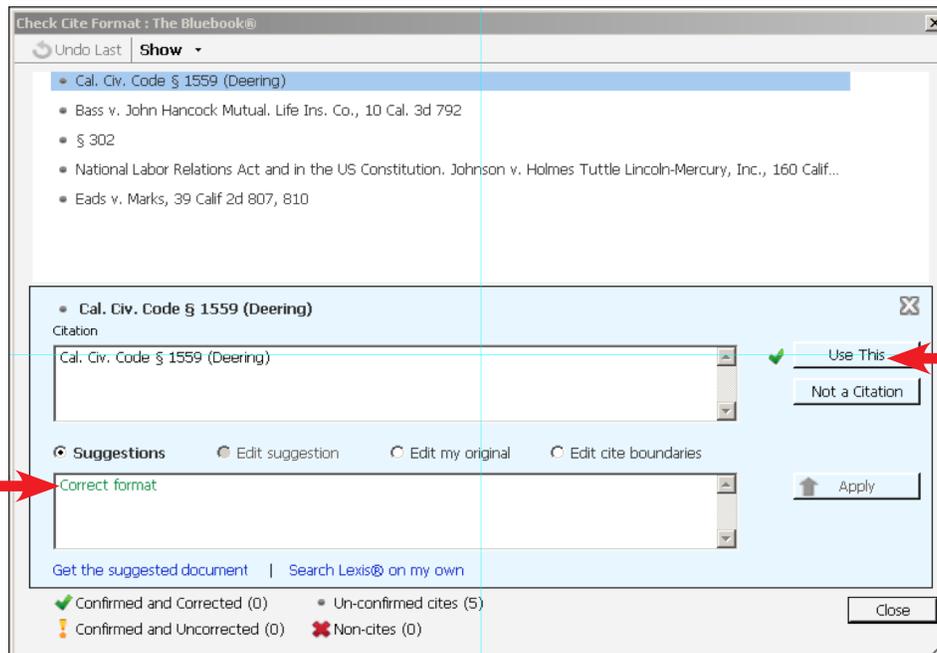
2.
To confirm you want the citation to be managed, click **Use This**.

3.
Once you click **Use This**, a green checkmark will be added to the citation in the list of suspected citations in the document being reviewed. The citation is now "managed." Therefore, it will now have its long and short forms changed as needed, and it will appear under the appropriate heading in the Table of Authorities.
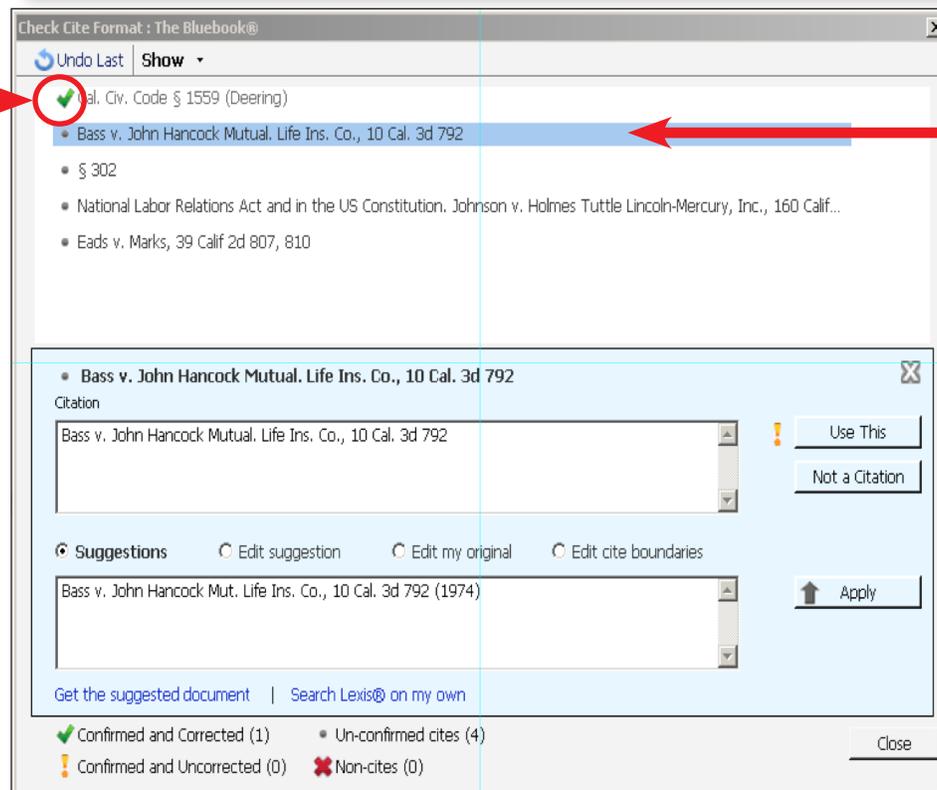
4.
The tool will then move down the list in the top of the dialog box to the next citation that needs to be reviewed.

Check Cite Format: Applying Suggested Citation Formats
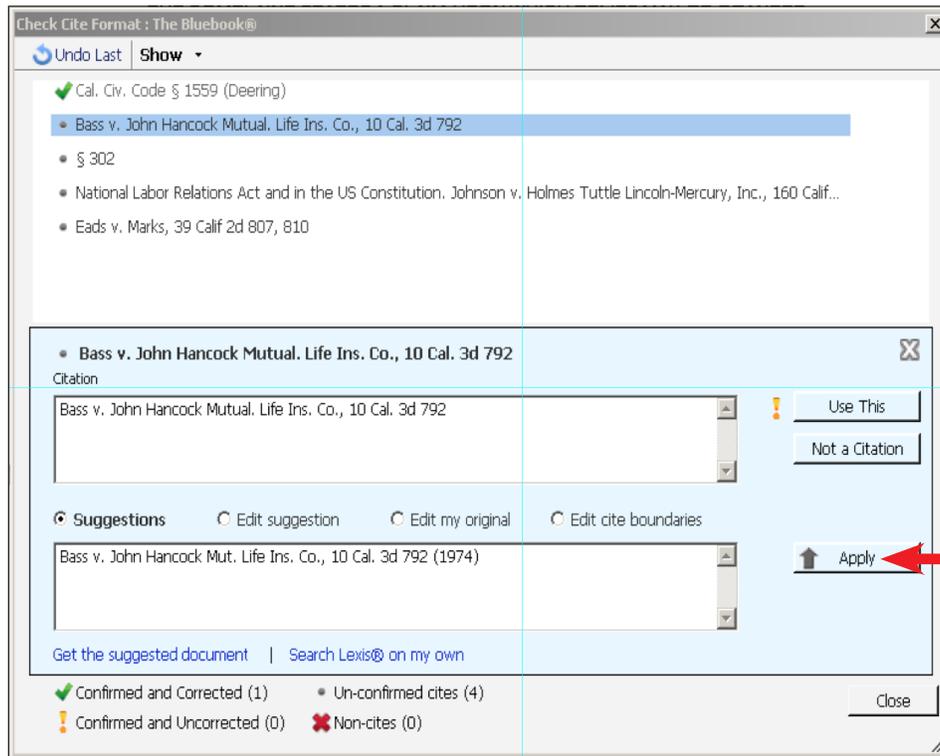
1.
When you are presented with a **Suggestion** that you would like to use to format your citation, first click **Apply**.
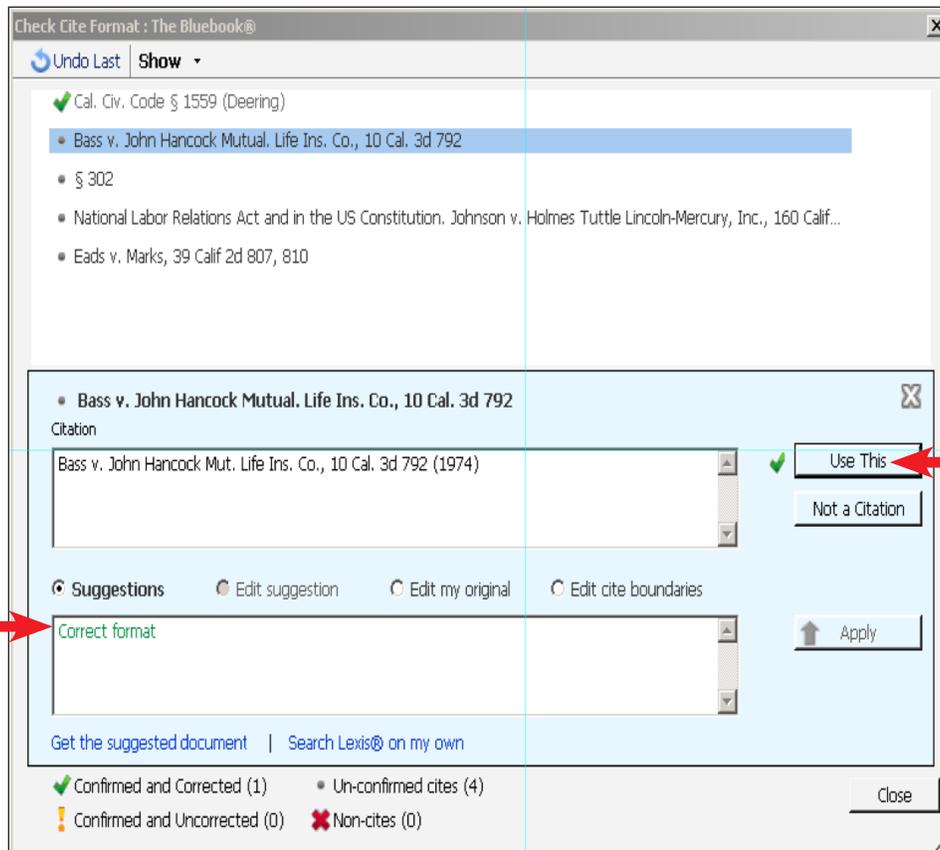
2.
You will then receive the message **Correct format** in the bottom box.

3.
Click **Use This** to apply the suggestion in your document and make the citation a "managed" citation and receive a green checkmark in the top of the dialog box.

Check Cite Format: Marking a Citation as "Not a Citation"

1.
Because § 302 is part of the popular name of an act, rather than part of an actual citation, click **Not a Citation**, and the suspected cite will not be included in your Table of Authorities nor "managed" as a citation.

The suspected cite will be marked with a ✘ in the list of citations at the top of the dialog box.
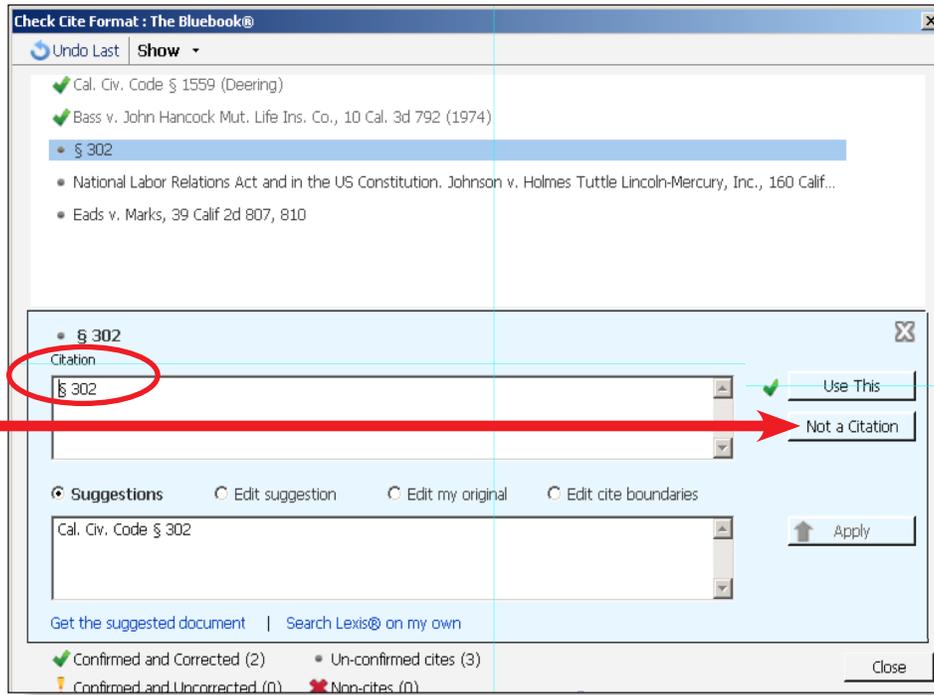
Check Cite Format: Redefining the Start and End of Citations

1.
If you encounter a situation where the tool includes extraneous text as part of the citation, such as "National Labor Relations Act and in the U.S. Constitution" in the example at left, click the radio button for **Edit cite boundaries** and highlight the specific text in the bottom box that you wish to include as a citation for the **Check Cite Format** tool.

Then click **Apply**.
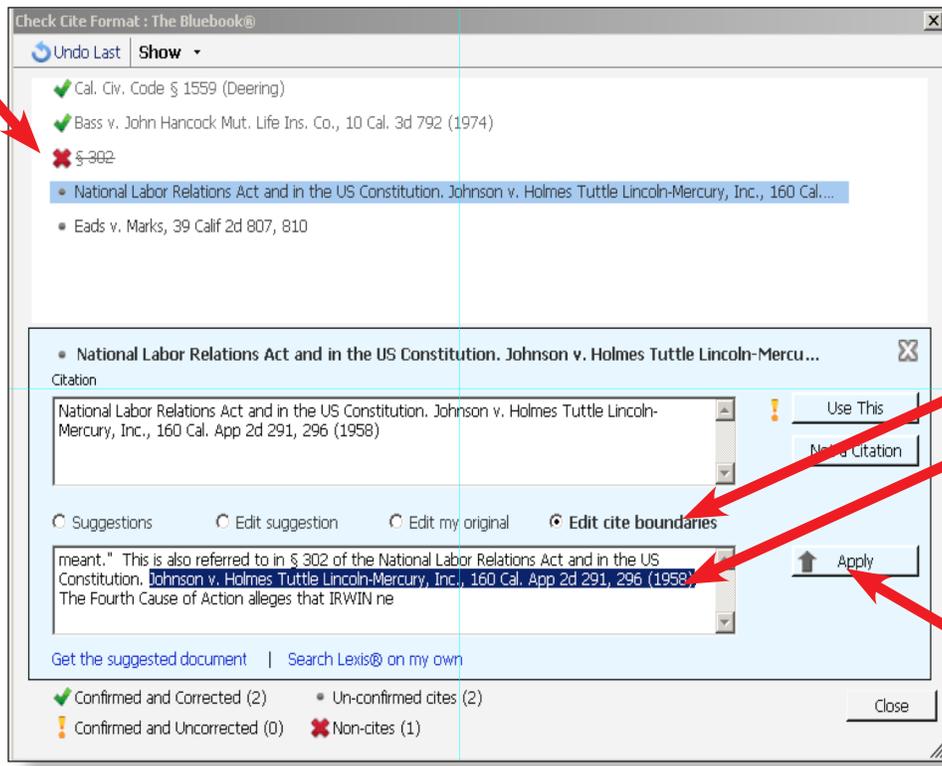
Check Cite Format: Redefining the Start and End of Citations—*continued*

2.

The tool will check what you have highlighted in the bottom box for correctness. In this example, there was an error in the inception page used in the citation.
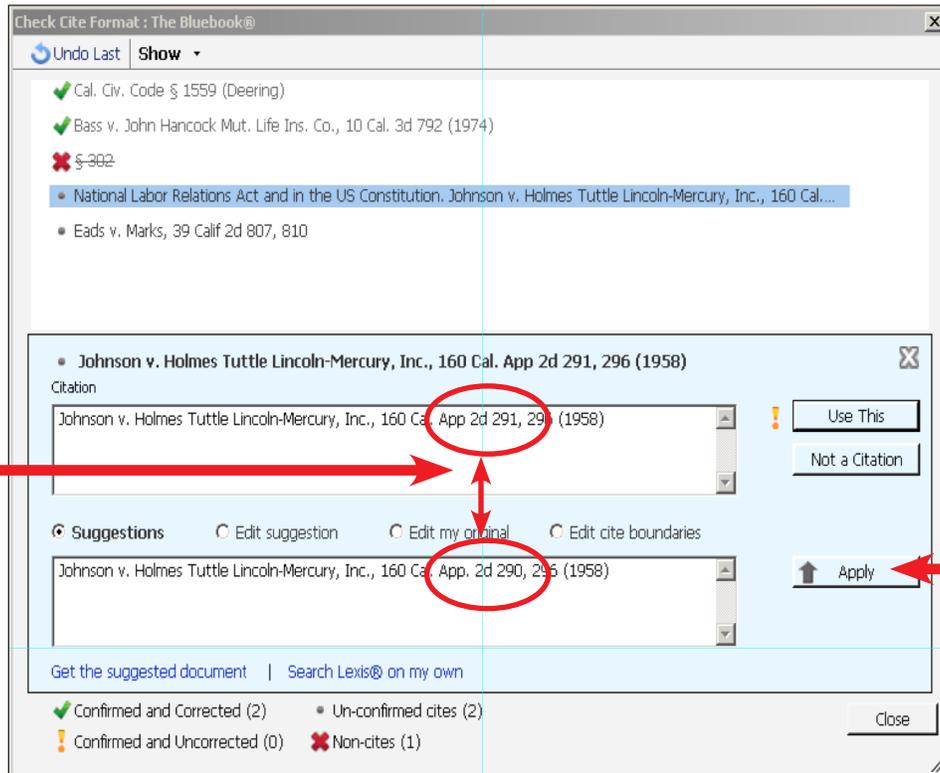
3.

To accept the suggestion, click **Apply** a second time.

4.

Once the suggestion has been accepted, you will receive a **Correct format** message in the bottom box.
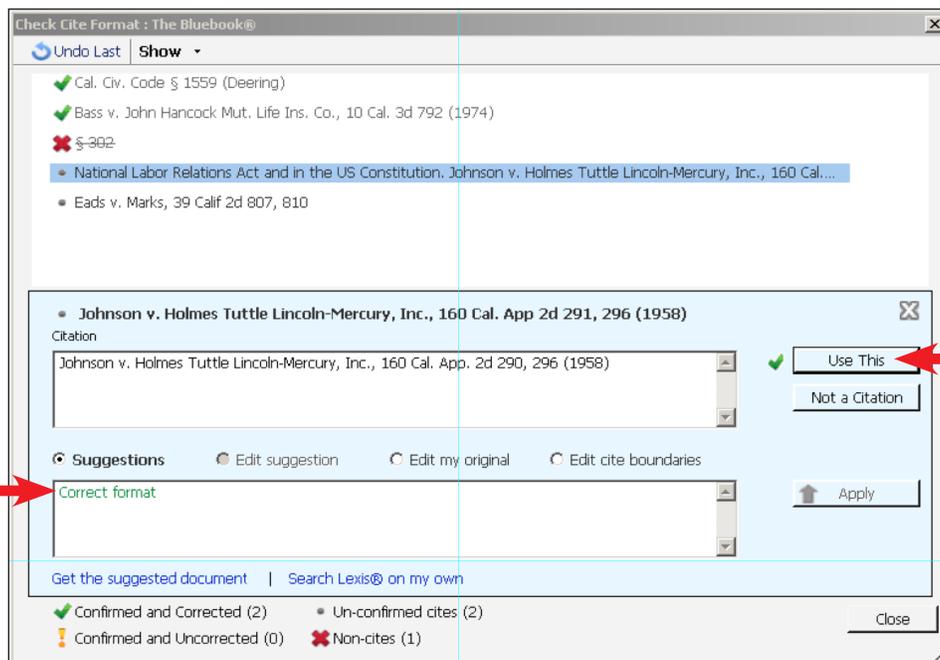
5.

Click **Use This** to have the change incorporated in the document; the citation will now be "managed."

Check Cite Format: Editing Suggestions

1.

In this example, you should revise the suggestion provided by Lexis *for* Microsoft Office using **Edit suggestion** to remove "Cal." from the court parenthetical as it is redundant based on the citation to Cal. 2d. Please note that all editing in **Check Cite Format** must be done in the bottom box.

Check Cite Format : The Bluebook®

Undo Last | Show ▾

✔ Cal. Civ. Code § 1559 (Deering)
✔ Bass v. John Hancock Mut. Life Ins. Co., 10 Cal. 3d 792 (1974)
✖ § 302
✔ Johnson v. Holmes Tuttle Lincoln-Mercury, Inc., 160 Cal. App. 2d 290, 296 (1958)
● Eads v. Marks, 39 Calif 2d 807, 810

● **Eads v. Marks, 39 Calif 2d 807, 810**
Citation
Eads v. Marks, 39 Calif 2d 807, 810

Use This
Not a Citation

○ Suggestions ● Edit suggestion ○ Edit my original ○ Edit cite boundaries
Eads v. Ma...9 Cal. 2d 807, 810 (Cal. 1952)

↑ Apply

Get the suggested document | Search Lexis® on my own

✔ Confirmed and Corrected (3) ● Un-confirmed cites (1)
❗ Confirmed and Uncorrected (0) ✖ Non-cites (1)

Close

2.

After removing "Cal." from the court parenthetical, click **Apply**.

3.

Now that you have received a **Correct format** message, click **Use This** to have your citation confirmed, receive a green checkmark and have the citation "managed."

Check Cite Format : The Bluebook®

Undo Last | Show ▾

✔ Cal. Civ. Code § 1559 (Deering)
✔ Bass v. John Hancock Mut. Life Ins. Co., 10 Cal. 3d 792 (1974)
✖ § 302
✔ Johnson v. Holmes Tuttle Lincoln-Mercury, Inc., 160 Cal. App. 2d 290, 296 (1958)
● Eads v. Marks, 39 Calif 2d 807, 810

● **Eads v. Marks, 39 Calif 2d 807, 810**
Citation
Eads v. Marks, 39 Cal. 2d 807, 810 (1952)

✔ Use This
Not a Citation

● Suggestions ○ Edit suggestion ○ Edit my original ○ Edit cite boundaries
Correct format

↑ Apply

Get the suggested document | Search Lexis® on my own

✔ Confirmed and Corrected (3) ● Un-confirmed cites (1)
❗ Confirmed and Uncorrected (0) ✖ Non-cites (1)

Close

Check Cite Format: Editing Your Original Citation Text

1. In this circumstance, you can choose to **Edit my original** to correct the abbreviation of the reporter from "Calif." to "Cal." Please note that even though you are editing the original citation, it must be done in the bottom box.
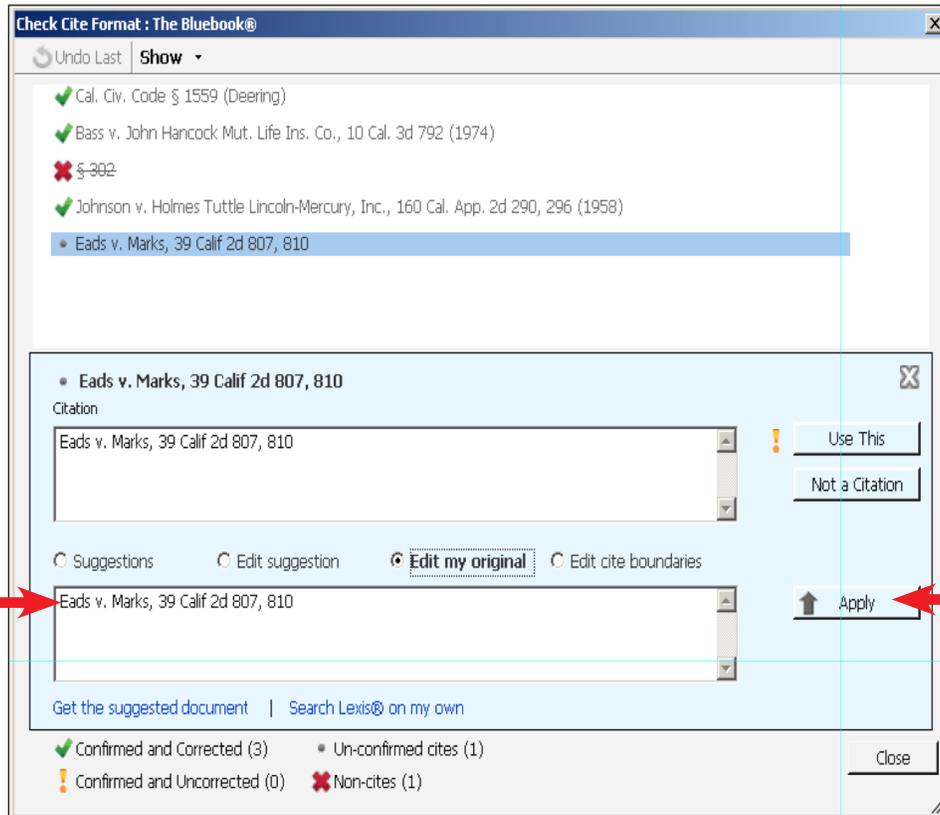
2. After you have made your edits, click **Apply**.

3. Once the edit has been accepted, you will receive a Correct format message in the bottom box.
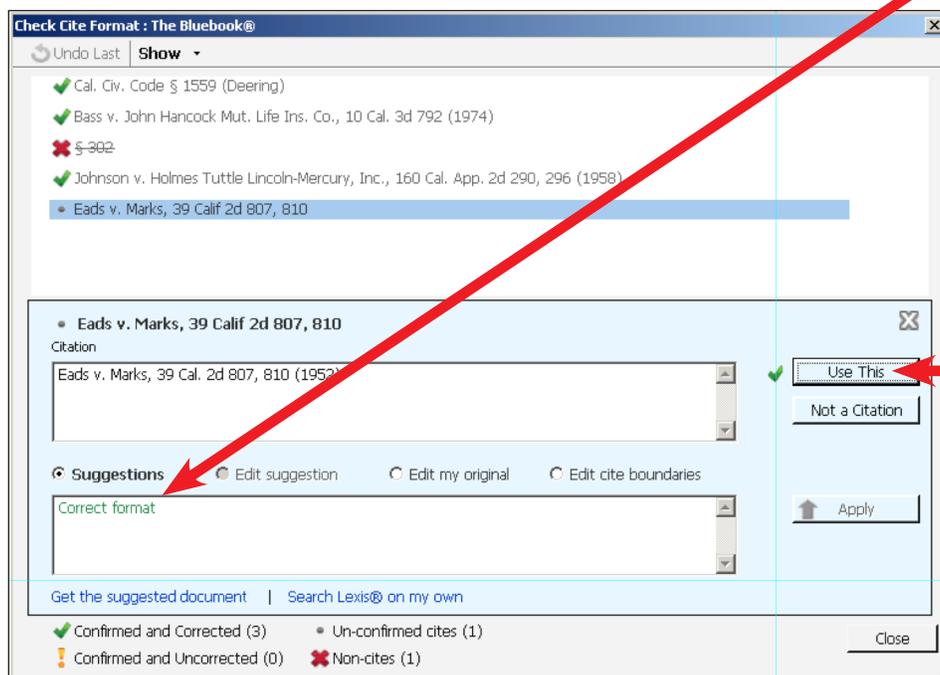
4. After Lexis *for* Microsoft Office has checked your edits and added a date of decision, click **Use This** to confirm the cite, obtain a green checkmark, and have the citation "managed."

LexisNexis® Customer Support: **888.539.4770**

Check Cite Format: Reviewing Citation Format Decisions

For purposes of showing how the status of each citation is treated differently, note that the citations in the list at the top of the dialog box have either a green checkmark, red X or yellow exclamation point.

A yellow exclamation point (which is used when a Lexis *for* Microsoft Office suggestion is not accepted by the user) indicates Lexis *for* Microsoft Office will NOT automatically update long/short citation formats according to the sequence of citations for the same case or statute. The citation will appear under the "Other" section in the Table of Authorities.

Check Cite Format : The Bluebook®

↺ Undo Last   Show ▾

✔ Cal. Civ. Code § 1559 (Deering)

✔ Bass v. John Hancock Mut. Life Ins. Co., 10 Cal. 3d 792 (1974)

✖ § 302

✔ Johnson v. Holmes Tuttle Lincoln-Mercury, Inc., 160 Cal. App. 2d 290, 296 (1958)

❗ Eads v. Marks, 39 Calif 2d 807, 810

Creating a Table of Authorities (TOA)

A Table of Authorities can only be created after all citation formats have been reviewed using **Check Cite Format**.

1.

If you want headings in your TOA, choose either a Jurisdiction-specific TOA **OR** a General-purpose TOA that is first sorted by Jurisdiction.

Insert Table of Authorities

Select a format for the Table of Authorities

◉ General-purpose Table of Authorities:

    Sort by: Jurisdiction ▾

    Then by: Order of appearance ▾

○ Jurisdiction-specific Table of Authorities:

    ⊞ Federal Courts

    ⊞ State Courts

☐ From now on, skip this step and use this selection as my default choice.
Tip: To change this setting at any time, click Preferences > Table of Authorities.

2.

When using the **Insert TOA** tool, if you choose to perform the **Sort by**: using either "Alphabetic" order **OR** Order of appearance, your Table of Authorities will not contain headings for each section.

3.

Check the box in the Table of Authorities dialog box to ensure your selected Table of Authorities are used in future documents.

4.

Citations in the document that had a green checkmark are placed under specific headings. The citation to § 302, which was marked as **Not a Citation**, is not included in the Table of Authorities. More specifically, because the citation to the Eads case had a yellow exclamation point next to it, the citation was placed under Other since it was uncorrected.

TABLE OF AUTHORITIES

California State Opinions

Bass v. John Hancock Mut. Life Ins. Co., 10 Cal. 3d 792 (1974) 2

Johnson v. Holmes Tuttle Lincoln-Mercury, Inc., 160 Cal. App. 2d 290 (1958) 3

California State Statutes

Cal. Civ. Code § 1559 (Deering) 1

Other

Eads v. Marks, 39 Calif 2d 807, 810 3

5.

You can edit the Table of Authorities manually and move a citation to a different section. But, this should only be done after no other citations are added/deleted/checked since using the **Update TOA** functionality will overwrite any manual Table of Authorities edits.

Once the TOA is created, it should be updated (by selecting **Update TOA** in the ribbon) whenever you add, delete, or check citations to ensure accuracy.